

Week 1-2: Discovery & Analysis - Execution Plan

Phase 1 Deliverable 3.1 - Detailed Implementation Guide

Created: October 27, 2025

Last Updated: October 31, 2025

Timeline: Week 1-2 (October 21 - November 7, 2025)

Status: Updated and ready for execution

Data Source: Fresh analysis, current market conditions as of October 31, 2025

Executive Summary

This plan details the execution of Week 1-2 deliverables for Phase 1 of the Chocolat on James project. We will complete 4 critical analysis deliverables using available MCPs and existing research documentation. The plan includes specific prompts for each agent and leverages the comprehensive research already completed in the proposal phase.

CORE STRATEGIC FOCUS: All deliverables must integrate the "Chocolat on James - Hamilton's Chocolate" brand positioning strategy, ensuring every analysis, recommendation, and implementation plan supports this critical market differentiation opportunity.

Week 1-2 Deliverables Overview

Deliverable 1: Competitive Analysis (COMPLETED)

- **Status:** Already completed via migration
- **File:** 2. Competitive Analysis/proposal-competitive-analysis.md
- **Content:** 8+ competitors analyzed with detailed feature comparisons

- **Action:** Review and adapt for Phase 1 format

Deliverable 2: Website Audit (IN PROGRESS)

- **Status:** Partially completed, needs enhancement
- **Files:** 4. Website Audit/technical-seo-audit.md , platform-comparison.md
- **Action:** Enhance with additional technical analysis

Deliverable 3: Financial Analysis (TO START)

- **Status:** Needs to be created
- **Target:** 5. Financial Analysis/
- **Action:** Create comprehensive financial analysis

Deliverable 4: Market Research (TO START)

- **Status:** Needs to be created
 - **Target:** 3. Market Research/
 - **Action:** Create Hamilton-specific market research
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MCP Requirements & Agent Delegation

Available MCPs:

- **firecrawl-mcp** (ENABLED): Website scraping, competitor analysis
- **perplexity-ask** (ENABLED): Market research, competitor identification
- **playwright** (ENABLED): Instagram scraping, social media analysis
- **dataforseo-mcp-server** (DISABLED - NEEDS ENABLING): Keyword research

Required MCPs for Week 1-2:

1. **firecrawl-mcp** - Website audits, competitor analysis
2. **perplexity-ask** - Market research, demographic data
3. **playwright** - Social media analysis, Instagram research

Detailed Execution Plan

DAY 1-2: Website Audit Enhancement

Agent Assignment: Technical SEO Specialist

MCP Required: firecrawl-mcp, playwright

Prompt for Agent:

You are a technical SEO specialist working on the Chocolat on James website audit.

CONTEXT:

- Client: Chocolat on James (chocolatonjames.com)
- Location: Hamilton, ON, James Street North
- Current platform: WordPress with Divi theme
- Business: Artisan chocolate shop with ice cream bar
- Goal: Comprehensive technical SEO audit for e-commerce readiness

EXISTING RESEARCH AVAILABLE:

- Technical SEO audit: `4. Website Audit/technical-seo-audit.md`
- Platform comparison: `4. Website Audit/platform-comparison.md`
- Competitive analysis: `2. Competitive Analysis/proposal-competitive-analysis.rmd`

TASKS:

1. Use firecrawl-mcp to perform fresh website analysis of chocolatonjames.com
2. Analyze technical SEO elements:
 - Page load speed (mobile & desktop)
 - Core Web Vitals
 - Mobile responsiveness
 - SSL certificate status
 - Meta tags and structured data
 - Internal linking structure
 - Image optimization
 - JavaScript/CSS optimization
3. Use playwright to test mobile user experience
4. Compare current state with competitor benchmarks from competitive analysis
5. Identify critical issues preventing e-commerce implementation
6. Create prioritized action plan for technical improvements

DELIVERABLE:

Create comprehensive technical SEO audit report in `4. Website Audit/enhanced-te

- Current technical score (0-100)
- Critical issues (P1, P2, P3 priorities)
- Performance benchmarks vs competitors
- E-commerce readiness assessment
- Implementation timeline and costs
- Specific recommendations for Shopify migration

REFERENCE MATERIALS:

- Review existing technical-seo-audit.md for baseline
- Use competitive analysis data for benchmarking
- Focus on e-commerce readiness requirements

DAY 3-4: Financial Analysis Creation

Agent Assignment: Financial Analyst

MCP Required: perplexity-ask (for industry benchmarks)

Prompt for Agent:

You are a financial analyst specializing in small business growth and e-commerce.

CONTEXT:

- Client: Chocolat on James (chocolatonjames.com)
- Business: Artisan chocolate shop in Hamilton, ON
- Current revenue: ~\$537K annually (from proposal phase analysis)
- Goal: 3-year financial projections and growth analysis

EXISTING RESEARCH AVAILABLE:

- Revenue analysis: `1. Proposal phase/financial-analysis/revenue-analysis.md` (migrated)
- Competitive analysis: `2. Competitive Analysis/proposal-competitive-analysis.rmd` (migrated)
- Market research: `1. Proposal phase/research/market-research.md` (migrated)

TASKS:

1. Use perplexity-ask to research:

- Canadian chocolate industry growth rates
- E-commerce adoption rates in food retail
- Hamilton business demographics and spending patterns
- Small business growth benchmarks for food retail

2. Analyze current financial performance from existing revenue analysis
3. Create 3-year financial projections including:
 - Revenue growth scenarios (conservative, moderate, aggressive)
 - E-commerce revenue projections
 - Corporate gifting revenue projections
 - Seasonal revenue smoothing analysis
4. Calculate ROI for Phase 1 investments
5. Identify key financial metrics and KPIs
6. Create break-even analysis for e-commerce implementation

DELIVERABLE:

Create comprehensive financial analysis in `5. Financial Analysis/financial-anal`

- Executive summary with key findings
- Current financial health assessment
- 3-year revenue projections (3 scenarios)
- Investment requirements and ROI analysis
- Break-even analysis
- Key performance indicators (KPIs)
- Risk assessment and mitigation strategies
- Recommendations for financial optimization

REFERENCE MATERIALS:

- Use existing revenue analysis as foundation
- Incorporate competitive pricing data
- Align with market research findings
- Focus on Phase 1 investment requirements

DAY 5-7: Market Research Creation

Agent Assignment: Market Research Specialist

MCP Required: perplexity-ask, firecrawl-mcp

Prompt for Agent:

You are a market research specialist focusing on local business development and

CONTEXT:

- Client: Chocolat on James (chocolatonjames.com)
- Location: Hamilton, ON, James Street North arts district

- Business: Artisan chocolate shop with seasonal ice cream bar
- Goal: Hamilton-specific market research and opportunity sizing

EXISTING RESEARCH AVAILABLE:

- Market research: `1. Proposal phase/research/market-research.md` (migrated)
- Competitive analysis: `2. Competitive Analysis/proposal-competitive-analysis.r
- Kickoff meeting notes: `1. Kickoff meeting/chocolat_kickoff_meeting_oct20_ACTL

TASKS:

1. Use perplexity-ask to research:
 - Hamilton demographics and economic indicators
 - James Street North development and foot traffic
 - Hamilton food scene and consumer spending patterns
 - Local business partnerships and opportunities
 - Tourism and visitor patterns in Hamilton
2. Use firecrawl-mcp to analyze:
 - Hamilton tourism websites
 - Local business directories
 - James Street North business listings
 - Hamilton event calendars and festivals
3. Analyze market opportunity sizing:
 - Total addressable market (TAM) for chocolate in Hamilton
 - Serviceable addressable market (SAM) for artisan chocolate
 - Serviceable obtainable market (SOM) for Chocolat on James
4. Identify key market segments:
 - Local residents (demographics, income, preferences)
 - Corporate clients (business density, gifting culture)
 - Tourists and visitors (events, attractions, spending)
 - Online customers (e-commerce potential)
5. Assess competitive landscape in Hamilton specifically
6. Identify partnership opportunities (McMaster, Ti-Cats, hotels, etc.)

DELIVERABLE:

Create comprehensive market research report in `3. Market Research/market-research-report.md`:

- Executive summary with key market insights
- Hamilton demographics and economic profile
- Market opportunity sizing (TAM/SAM/SOM)
- Consumer behavior analysis
- Competitive landscape in Hamilton
- Partnership opportunity analysis
- Market entry and growth strategies
- Risk assessment and market challenges

REFERENCE MATERIALS:

- Use existing market research as foundation
- Incorporate competitive analysis insights
- Focus on Hamilton-specific opportunities
- Align with Phase 1 corporate gifting strategy

DAY 8-10: Integration and Quality Review**Agent Assignment: Project Coordinator****MCP Required:** None (review and integration)**Prompt for Agent:**

You are a project coordinator responsible for integrating and quality-checking all deliverables from Day 7.

CONTEXT:

- All 4 deliverables should be completed by Day 7
- Need to ensure consistency and integration across all reports
- Prepare for Week 3-4 strategy development phase

TASKS:

1. Review all completed deliverables for:
 - Consistency in data and findings
 - Alignment with Phase 1 objectives
 - Quality and completeness
 - Professional formatting and presentation
2. Cross-reference findings across reports:
 - Ensure financial projections align with market research
 - Verify competitive analysis supports market positioning
 - Confirm website audit findings support e-commerce strategy
3. Identify gaps or inconsistencies that need resolution
4. Create integrated executive summary highlighting:
 - Key findings across all 4 deliverables
 - Critical insights for Phase 1 implementation
 - Priority recommendations for Week 3-4
5. Prepare handoff materials for strategy development phase

DELIVERABLE:

Create integration report in `WEEK-1-2-INTEGRATION-REPORT.md` including:

- Executive summary of all findings
- Cross-deliverable insights and recommendations
- Priority action items for Week 3-4
- Quality assurance checklist
- Handoff notes for strategy development phase

REFERENCE MATERIALS:

- All 4 completed deliverables
- Phase 1 PRD requirements
- Competitive analysis findings
- Market research insights

Execution Timeline

Week 1 (October 21-27, 2025)

- **Day 1-2:** Website Audit Enhancement
- **Day 3-4:** Financial Analysis Creation
- **Day 5-7:** Market Research Creation

Week 2 (November 1 - November 7, 2025)

- **Day 8-10:** Integration and Quality Review
- **Day 11-12:** Final review and handoff preparation
- **Day 13-14:** Buffer time for revisions and refinements

Quality Assurance Checklist

For Each Deliverable:

- [] Professional formatting and presentation
- [] Data accuracy and source citations
- [] Alignment with Phase 1 objectives

- [] Actionable recommendations included
- [] Integration with other deliverables
- [] Client-ready quality standards

For Integration:

- [] Consistent findings across reports
 - [] No conflicting recommendations
 - [] Clear priority hierarchy
 - [] Executive summary captures key insights
 - [] Ready for strategy development phase
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Risk Mitigation

Potential Challenges:

1. **MCP Availability:** Have backup research methods ready
2. **Data Quality:** Cross-reference multiple sources
3. **Timeline Delays:** Built-in buffer time in Week 2
4. **Integration Issues:** Daily coordination check-ins

Mitigation Strategies:

1. **Parallel Execution:** Run multiple tasks simultaneously where possible
 2. **Quality Gates:** Review each deliverable before moving to next
 3. **Regular Check-ins:** Daily progress reviews
 4. **Backup Plans:** Alternative research methods if MCPs fail
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Success Metrics

Completion Criteria:

- [] All 4 deliverables completed and reviewed
- [] Integration report created
- [] Quality assurance checklist completed
- [] Ready for Week 3-4 strategy development
- [] Client-ready materials prepared

Quality Standards:

- Professional presentation and formatting
 - Data-driven insights and recommendations
 - Clear action items and priorities
 - Integration across all deliverables
 - Alignment with Phase 1 objectives
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Next Steps After Week 1-2

Week 3-4 Preparation:

1. **Strategy Development Phase** begins
2. **12-Month Growth Roadmap** creation
3. **Pricing & Product Strategy** development
4. **SEO & Content Strategy** planning
5. **Social Media Strategy** creation

Handoff Materials:

- All 4 completed analysis reports
 - Integration summary with key insights
 - Priority recommendations for strategy development
 - Data and research foundation for strategic planning
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Document Status: Complete and ready for execution

Created: October 21, 2025

Next Review: After Week 1-2 completion

Owner: Project Team

Timeline: 2 weeks (October 21 - November 4, 2025)