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Email Marketing Strategy

Templates and Automation Workflows - Phase 1 Deliverable #9

Date: November 2025
Prepared for: Dan Edwards, Chocolat on James
Status: Complete

Executive Summary

This document outlines the comprehensive email marketing strategy for Chocolat on James, including list-building tactics, segmentation strategies, automation workflows, and campaign templates. The strategy focuses on building a loyal subscriber base, driving repeat purchases, and maintaining customer relationships through targeted email communications.

Strategy Overview

Objectives

1. **Build Email List:** Grow from 0 to 2,500+ subscribers Year 1
2. **Drive Revenue:** Generate \$30K-60K revenue through email Year 1
3. **Retain Customers:** Increase repeat purchase rate to 25-30%
4. **Nurture Relationships:** Maintain ongoing customer engagement
5. **Support Business Goals:** Drive traffic, sales, and brand awareness

Current Status

Email List: 0 subscribers (building from scratch)
Platform: TBD (Klaviyo recommended)

Status: Foundation needed - high opportunity

Email Platform Recommendations

Recommended: Klaviyo

Why Klaviyo: - E-commerce integration (for Pavement website) - Advanced segmentation capabilities - Automation workflows - Email and SMS in one platform - Cost-effective scaling - Local business friendly

Pricing: - Free: Up to 250 contacts - Paid: \$20-45/month for 2,500-5,000 contacts - Scales with business growth

Alternative Options: - **Mailchimp:** Good for beginners, lower cost - **Constant Contact:** Simple interface, local business focus - **ConvertKit:** Content-focused, good for newsletters

Setup Requirements: 1. Create Klaviyo account 2. Connect to Pavement website (once live) 3. Set up email domain authentication 4. Configure double opt-in 5. Set up GDPR/Canada compliance

List Building Strategy

Phase 1: Foundation (Q4 2025 - Q1 2026)

Target: 300-500 subscribers

Capture Methods:

1. In-Store Tablet Signup - Offer: 10% off first online order - Process: Staff asks every customer - Frequency: Daily - Expected: 5-10 signups/day = 150-300/month

2. Website Popup (Once E-commerce Launches) - Offer: "Join Hamilton Chocolate Club - 10% off first order" - Timing: Exit-intent popup - Frequency: After 30 seconds or exit-intent - Expected: 2-5% conversion = 20-50/month

3. Events - McMaster Event (Nov 21-24, 2025) - Art Crawl events - Local markets - Expected: 100-200 signups (events)

4. Social Media - Instagram Stories link - Facebook posts - Link in bio - Expected: 20-50/month

Phase 2: Growth (Q2-Q4 2026)

Target: 2,500+ subscribers

Additional Methods:

1. Referral Program - Offer: "Give \$10, Get \$10" - Process: Subscribers refer friends - Expected: 50-100/month

2. Content Upgrades - Downloadable guides (gift guides, pairing guides) - Newsletter-exclusive content - Expected: 30-50/month

3. Partnerships - Cross-promotion with partners - Ti-Cats, McMaster, hotels - Expected: 100-200/month

4. Paid Advertising - Facebook/Instagram ads - Google ads - Expected: 100-200/month

Segmentation Strategy

Customer Segments

1. New Subscribers - Just joined email list - Haven't purchased yet - Welcome series (3 emails)
- Goal: First purchase

2. First-Time Buyers - Made first purchase - Post-purchase series (3 emails) - Goal: Second purchase

3. Repeat Customers - 2+ purchases - VIP treatment - Goal: Increase frequency and value

4. High-Value Customers - 5+ purchases or \$200+ lifetime value - Exclusive offers - Goal: Retention and advocacy

5. Corporate Customers - Corporate gifting buyers - B2B content - Goal: Recurring orders

6. Dormant Customers - No purchase in 90+ days - Re-engagement campaigns - Goal: Reactivation

Segmentation Criteria

Purchase Behavior: - Total purchases - Average order value - Last purchase date - Product categories purchased - Purchase frequency

Engagement Behavior: - Email open rate - Click rate - Email engagement recency - Website visits (if tracked)

Demographic: - Location (Hamilton, GTA, other) - Age (if available) - Preferences (if collected)

Automation Workflows

Workflow 1: Welcome Series (3 emails)

Trigger: New subscriber joins list

Duration: 7 days

Goal: First purchase

Email 1: Welcome (Immediate) - Subject: "Welcome to Hamilton Chocolate Club!" - Content: Welcome message, brand introduction, subscriber discount (10% off) - CTA: Shop now, Visit us - Goal: First purchase

Email 2: Our Story (Day 2) - Subject: "Hamilton's Chocolate Story" - Content: Chocolat on James history, "Hamilton's Chocolate" positioning, artisan process - CTA: Visit us on James Street - Goal: Brand connection

Email 3: First Order Encouragement (Day 7) - Subject: “Don’t miss out - 10% off expires soon!” - Content: Popular products, gift guide, reminder of discount - CTA: Shop now (with discount) - Goal: First purchase conversion

Workflow 2: Abandoned Cart (3 emails)

Trigger: Add to cart but no purchase within 2 hours

Duration: 5 days

Goal: Complete purchase

Email 1: Reminder (2 hours after abandonment) - Subject: “Your chocolate is waiting...” - Content: Cart reminder, products in cart, free shipping (if applicable) - CTA: Complete purchase - Goal: Immediate conversion

Email 2: Incentive (24 hours after abandonment) - Subject: “10% off your cart - valid for 48 hours” - Content: Cart reminder, 10% discount code, limited time - CTA: Complete purchase with discount - Goal: Conversion with incentive

Email 3: Last Chance (5 days after abandonment) - Subject: “Last chance - your cart expires tomorrow” - Content: Final reminder, urgency messaging - CTA: Complete purchase - Goal: Final conversion attempt

Workflow 3: Post-Purchase (3 emails)

Trigger: First purchase completed

Duration: 14 days

Goal: Second purchase

Email 1: Thank You (Immediate) - Subject: “Thank you for your order!” - Content: Order confirmation, delivery tracking, thank you message - CTA: Track order, Shop again - Goal: Customer satisfaction

Email 2: Product Care (Day 3) - Subject: “How to store your chocolate for best flavor” - Content: Storage tips, tasting suggestions, pairing ideas - CTA: Shop again, Learn more - Goal: Education and engagement

Email 3: Second Purchase Encouragement (Day 14) - Subject: “Ready for more? 15% off your next order” - Content: Product recommendations, customer favorites, 15% discount - CTA: Shop now with discount - Goal: Second purchase

Workflow 4: Re-engagement (2 emails)

Trigger: No purchase in 90+ days

Duration: 14 days

Goal: Reactivation

Email 1: We Miss You (Day 90) - Subject: “We miss you! Here’s 20% off” - Content: Re-engagement message, new products, special offer (20% off) - CTA: Shop now with discount - Goal: Reactivation

Email 2: Last Chance (Day 105) - Subject: “Last chance - are we still a match?” - Content: Preference survey, unsubscribe option, final offer - CTA: Update preferences or unsubscribe - Goal: Clean list or reactivate

Workflow 5: VIP Program (Ongoing)

Trigger: 5+ purchases or \$200+ lifetime value

Frequency: Monthly

Goal: Retention and advocacy

Monthly VIP Email: - Subject: “Your VIP update - exclusive access” - Content: Exclusive products, early access, special discounts, VIP perks - CTA: Shop VIP collection - Goal: Retention and increased value

Campaign Calendar

Recommended Email Frequency

Best Practice for E-commerce: - **Minimum:** 2 emails per week (104 emails/year) - **Target:** 3 emails per week (156 emails/year) - **Optimal during campaigns:** 4-5 emails per week during holidays

Why Weekly Frequency Matters: - Maintains top-of-mind awareness - Drives consistent website traffic - Increases customer lifetime value - Industry benchmarks show 2-3 emails/week optimal for specialty food retail

Weekly Email Schedule

Tuesday: Newsletter & Content - Subject focus: Education, stories, Hamilton news - Content: Chocolate tips, behind-the-scenes, local spotlights - Timing: 10:00 AM - Goal: Engagement and brand building

Thursday: Product & Promotional - Subject focus: Products, offers, new arrivals - Content: Featured products, subscriber discounts, seasonal items - Timing: 10:00 AM or 6:00 PM - Goal: Drive sales and traffic

Saturday: Weekend & Event Focus - Subject focus: Weekend specials, events, gift ideas - Content: In-store promotions, event reminders, gift guides - Timing: 10:00 AM - Goal: Drive foot traffic and event attendance

Optional 4th Email (Peak Seasons): - Subject focus: Urgency, flash sales, last chance - Content: Time-sensitive offers, limited inventory - Timing: As needed - Goal: Conversion during campaigns

Email Content Mix

Content Distribution: - 40% Promotional (products, sales, offers) - 30% Educational (chocolate tips, pairing guides, stories) - 20% Community (Hamilton events, partnerships, UGC) - 10% Transactional follow-ups (post-purchase, reviews)

Seasonal Campaigns

Holiday Campaigns: - Valentine's Day (February) - Easter (March/April) - Mother's Day (May) - Father's Day (June) - Halloween (October) - Thanksgiving (October) - Christmas (November/December)

Campaign Structure (Multi-Email Sequences): - Pre-campaign: Preview (2 weeks before) - 1-2 emails - Main Campaign: Product launch (1 week before) - 2-3 emails - Urgency: Last chance (2-3 days before) - 1-2 emails - Post-Campaign: Thank you and recap (1 week after) - 1 email

Holiday Email Volume: - Valentine's Week: 5-6 emails - Easter Week: 4-5 emails - Mother's Day Week: 5-6 emails - Christmas Season (Nov-Dec): 3-4 emails per week

Promotional Campaigns

Types: - Flash sales (24-48 hours) - Weekend promotions - Clearance sales - New product launches - Event promotions

Frequency: - Woven into weekly schedule (primarily Thursday/Saturday) - 2-3 promotional emails per week during campaigns - Balance promotional with value-driven content

12-Month Email Calendar 2026

January 2026 (12 Emails)

Week 1: - Tue: New Year, New Chocolate Discoveries - What's New in 2026 - Thu: Post-Holiday Self-Care - Treat Yourself Collection - Sat: Weekend Special: Buy 2 Bars, Get 1 Free

Week 2: - Tue: Chocolate Tasting 101 - How to Taste Like a Pro - Thu: Winter Comfort Collection - Cozy Flavors for Cold Days - Sat: Art Crawl This Weekend - Visit Us on James Street

Week 3: - Tue: Behind the Scenes - Our January Chocolate Making Process - Thu: Valentine's Preview - Early Bird 15% Off Pre-Orders - Sat: Corporate Gifting Special - Start Planning Q1 Gifts

Week 4: - Tue: Customer Spotlight - Your Chocolate Stories - Thu: New Arrival: [Seasonal Flavor] Truffle Collection - Sat: Last Week of January - Month-End Flash Sale

February 2026 (16 Emails - Valentine's Focus)

Week 1: - Tue: Valentine's Gift Guide - Find the Perfect Match - Thu: Heart-Shaped Truffle Collection Now Available - Sat: Valentine's Countdown - 2 Weeks to Go! - Sun: Subscriber Exclusive: Early Access Valentine's Collection

Week 2: - Tue: The History of Chocolate & Romance - Thu: Last Chance for Valentine's Shipping (Order by Friday!) - Sat: Valentine's Weekend Prep - Gift Ideas by Price - Mon: Valentine's Week Kickoff - 10% Off Everything

Week 3: - Tue: Happy Valentine's Day! In-Store Specials Today - Thu: Post-Valentine's Self-Love Sale - 20% Off - Sat: Weekend Clearance - Valentine's Collection

Week 4: - Tue: Thank You for a Record Valentine's Week! - Thu: March Preview - Spring Flavors Coming Soon - Sat: Leap Day Special (if applicable) or Winter Clearance

March 2026 (12 Emails)

Week 1: - Tue: Spring Has Sprung - Lighter, Brighter Flavors - Thu: New: Citrus & Floral Truffle Collection - Sat: Women's History Month - Women in Chocolate

Week 2: - Tue: Easter Preview - Order Early for Best Selection - Thu: Spring Pairing Guide - Chocolate + Wine + Cheese - Sat: St. Patrick's Day Special - Mint Chocolate Collection

Week 3: - Tue: How We Source Our Cocoa - Bean to Bar Story - Thu: Easter Collection Full Launch - Hop to It! - Sat: Corporate Easter Gifts - Deadline Approaching

Week 4: - Tue: Easter Week Countdown - Last Shipping Date Friday - Thu: Easter Gift Guide - Ideas for Every Basket - Sat: Easter Weekend In-Store Events

April 2026 (12 Emails)

Week 1: - Tue: Post-Easter Thank You + Spring Forward Sale - Thu: April Showers, Chocolate Powers - Rainy Day Treats - Sat: Staff Picks for April - Our Team's Favorites

Week 2: - Tue: Mother's Day Early Bird - Pre-Order Now, Save 15% - Thu: Spring Cleaning Your Chocolate Stash (Storage Tips) - Sat: Earth Day Special - Sustainable Chocolate Practices

Week 3: - Tue: Hamilton Local Spotlight - Our Favorite Partners - Thu: Mother's Day Gift Sets - Something for Every Mom - Sat: Art Crawl Weekend - Special In-Store Tastings

Week 4: - Tue: The Science of Chocolate - Why It Makes Us Happy - Thu: Last Week for Mother's Day Shipping! - Sat: Mother's Day Weekend Prep - Gift Wrapping Available

May 2026 (16 Emails - Mother's Day Focus)

Week 1: - Tue: Mother's Day Final Countdown - Order by Wednesday! - Thu: Last Minute Mother's Day - Gift Cards Available - Sat: Happy Mother's Day Weekend! In-Store Specials - Sun: Mother's Day - Treat the Mom in Your Life

Week 2: - Tue: Thank You for Making Moms Smile! - Thu: Post-Mother's Day Self-Care - You Deserve Chocolate Too - Sat: Spring Sale - 20% Off Selected Items

Week 3: - Tue: Victoria Day Long Weekend Preview - Thu: BBQ Season - Chocolate Desserts for Outdoor Parties - Sat: Long Weekend Special - Stock Up and Save

Week 4: - Tue: Summer Preview - Refreshing Chocolate Ideas - Thu: Father's Day Early Bird - Pre-Order Opens - Sat: Memorial Weekend (US visitors) - Welcome Specials

June 2026 (16 Emails - Father's Day Focus)

Week 1: - Tue: Father's Day Gift Guide - Chocolate for Dad - Thu: Dark Chocolate Collection - Bold Flavors for Bold Dads - Sat: Pride Month - Love is Love, Chocolate is Universal

Week 2: - Tue: Father's Day Collection Full Launch - Thu: Last Chance Father's Day Shipping - Order by Friday - Sat: Father's Day Gift Ideas by Interest

Week 3: - Tue: Happy Father's Day Weekend! In-Store Specials - Thu: Post-Father's Day - Summer Kickoff Sale - Sat: Summer Solstice Celebration - Longest Day, Best Treats

Week 4: - Tue: Summer Storage Tips - Keep Chocolate Cool - Thu: Canada Day Preview - Red & White Collection - Sat: End of Q2 - Thank You for an Amazing Spring!

July 2026 (12 Emails)

Week 1: - Tue: Happy Canada Day! Red & White Chocolate Collection - Thu: Summer Road Trip - Chocolate Travel Tips - Sat: July 4th Weekend - Welcome American Visitors!

Week 2: - Tue: Beat the Heat - Frozen Chocolate Treats - Thu: Summer Entertaining - Chocolate Platter Ideas - Sat: Art Crawl Special - Summer Edition

Week 3: - Tue: Hamilton Supercrawl Preview - Get Excited! - Thu: Mid-Summer Sale - 15% Off Summer Collection - Sat: Weekend Warrior - Ice Cream + Chocolate Pairings

Week 4: - Tue: Behind the Scenes - Summer at the Shop - Thu: August Preview - Back-to-School Coming Soon - Sat: Christmas in July? Start Corporate Gift Planning!

August 2026 (12 Emails)

Week 1: - Tue: Civic Holiday Weekend - Summer Celebration Sale - Thu: Back-to-School - Teacher Appreciation Gifts - Sat: Long Weekend Special - Stock Up!

Week 2: - Tue: Hamilton School Guide - Chocolate for Teacher Gifts - Thu: Fall Preview - Warm Spice Flavors Coming - Sat: Art Crawl - Last Summer Edition

Week 3: - Tue: Supercrawl Countdown - 3 Weeks to Go! - Thu: Labour Day Early Bird - Pre-Order Fall Collection - Sat: End of Summer Sale - Last Chance for Summer Flavors

Week 4: - Tue: Thank You for an Amazing Summer! - Thu: Labour Day Weekend Preview - Sat: Labour Day Sale - 20% Off Sitewide

September 2026 (12 Emails)

Week 1: - Tue: Fall is Here - Warm Spice Collection Launch - Thu: Supercrawl Week! Visit Our Booth - Sat: Supercrawl Special - Event-Only Flavors

Week 2: - Tue: Post-Supercrawl Recap - What a Weekend! - Thu: Pumpkin Spice Season - Yes, We Have It - Sat: Fall Pairing Guide - Chocolate + Apple Cider

Week 3: - Tue: Corporate Gifting Season Opens - Book Early! - Thu: McMaster Welcome Week - Student Specials - Sat: Art Crawl Returns - Fall Edition

Week 4: - Tue: Halloween Preview - Spooky Sweets Coming - Thu: Thanksgiving (Canada) Early Planning - Sat: End of September Flash Sale

October 2026 (16 Emails - Thanksgiving & Halloween)

Week 1: - Tue: Thanksgiving Collection Launch - Share the Thanks - Thu: Corporate Thanksgiving Gifts - Order Deadline Friday - Sat: Thanksgiving Weekend Prep - Host Gifts Ready

Week 2: - Tue: Happy Thanksgiving! In-Store Specials - Thu: Post-Thanksgiving - Halloween Full Speed Ahead - Sat: Halloween Collection Launch - Trick or Treat!

Week 3: - Tue: Spooky Chocolate Creations - Behind the Scenes - Thu: Halloween Party Guide - Chocolate for Your Bash - Sat: Halloween Week Countdown - Last Orders Friday

Week 4: - Tue: Happy Halloween! Spooky In-Store Event - Thu: November Preview - Holiday Season Begins - Sat: All Saints Day - Fall Clearance Sale

November 2026 (16 Emails - Holiday Season Launch)

Week 1: - Tue: Holiday Collection Preview - First Look! - Thu: Corporate Gifting Guide - Book Your Orders Now - Sat: Remembrance Day - Gratitude & Chocolate

Week 2: - Tue: Black Friday Preview - VIP Early Access Coming - Thu: Holiday Gift Guide - Something for Everyone - Sat: Small Business Saturday Prep - Shop Local

Week 3: - Tue: Black Friday VIP Early Access - 25% Off - Thu: Black Friday - Our Biggest Sale of the Year! - Sat: Small Business Saturday - Thank You Hamilton! - Sun: Cyber Monday - Online Exclusive Deals

Week 4: - Tue: December Countdown - Holiday Rush Begins - Thu: Advent Calendar Collection - Count Down with Chocolate - Sat: Corporate Order Deadline Approaching!

December 2026 (20 Emails - Peak Holiday Season)

Week 1: - Tue: December is Here! Holiday Collection Full Launch - Thu: 12 Days of Christmas Sale - Day 1 - Sat: Hanukkah Gifts - Light Up the Season - Sun: 12 Days of Christmas - Day 4

Week 2: - Tue: Last Week for Standard Shipping! - Wed: 12 Days of Christmas - Mid-Week Special - Thu: Corporate Gift Final Call - Order by Friday! - Sat: 12 Days of Christmas - Weekend Deals - Sun: Gift Guide Reminder - Still Need Ideas?

Week 3: - Tue: Express Shipping Only - Order by Wednesday! - Wed: Last Chance Online Orders - Gift Cards Always Arrive! - Thu: In-Store Extended Hours - Last-Minute Shopping - Sat: Christmas Eve - We're Open! Final Hours - Sun: Merry Christmas! Thank You for an Amazing Year

Week 4: - Tue: Boxing Day Sale - 30% Off Holiday Collection - Thu: Year-End Reflection - 2026 Highlights - Sat: New Year's Eve - Ring in 2027 with Chocolate - Sun: Happy New Year! 2027 Preview Coming Soon

Annual Email Summary

Total Planned Emails for 2026: 168 emails - Average: 14 emails per month / 3.2 emails per week - Peak months (Feb, May, June, Oct, Nov, Dec): 16-20 emails each

This Calendar Provides: - Consistent weekly touchpoints - Strategic holiday campaign sequences - Mix of promotional and value content - Clear subject line inspiration for each send - Balance between sales and relationship building

Email Template Library

Available Templates

Location: Week 3-4/Templates & Tools/2. Template Production/Email Marketing Templates/C0J-Email-Templates-Welcome-Series.md

Template Types:

- 1. Welcome Series (3 emails)** - Welcome email - Brand story email - First purchase encouragement
 - 2. Transactional Emails** - Order confirmation - Shipping notification - Delivery confirmation - Receipt
 - 3. Promotional Emails** - Sale announcements - New product launches - Seasonal campaigns - Flash sales
 - 4. Content Emails** - Newsletter template - Educational content - Product highlights - Event announcements
 - 5. Automation Emails** - Abandoned cart series - Post-purchase series - Re-engagement series - Birthday emails
-

Subject Line Strategy

Best Practices

Effective Subject Lines: - Personalization: Use first name - Urgency: Limited time, last chance
- Curiosity: Questions, teasers - Value: Discounts, offers - Local: Hamilton references

Subject Line Examples:

Welcome: - “Welcome to Hamilton Chocolate Club! ” - “You’re in! 10% off your first order” -
“Welcome to the club, [Name]!”

Promotional: - “Flash Sale: 20% off ends tonight” - “New: Valentine’s Collection just launched”
- “Last chance: Holiday orders close tomorrow”

Content: - “This week in Hamilton Chocolate” - “Your weekly dose of chocolate” - “What’s new
at Chocolat on James”

Local: - “Hamilton’s Chocolate Weekly” - “James Street Chocolate Updates” - “Your Hamilton
Chocolate Club”

Success Metrics

Key Performance Indicators

Email Volume: - Emails per week (target: 3 minimum) - Emails per month (target: 12-16) -
Total emails Year 1 (target: 168+) - Automation emails (target: 5 active workflows)

List Growth: - Subscriber count (target: 2,500+ Year 1) - Growth rate (target: 150-200/month)
- List health (churn rate < 5%) - Source tracking (in-store, online, events)

Engagement: - Open rate (target: 25-35%) - Click rate (target: 3-5%) - Click-to-open rate (target:
10-15%) - Unsubscribe rate (target: < 0.5%)

Revenue: - Email revenue (target: \$30K-60K Year 1) - Revenue per email sent (target: \$180-360
per email) - Revenue per subscriber (target: \$12-24) - Conversion rate (target: 2-4%)

Customer Retention: - Repeat purchase rate (target: 25-30%) - Customer lifetime value (target:
\$200-300) - Purchase frequency (target: 2-3x per year) - Average order value (target: \$55-70)

Implementation Timeline

Phase 1: Setup (Q4 2025)

- ☐ Select email platform (recommend Klaviyo)
- ☐ Set up email domain authentication
- ☐ Configure double opt-in
- ☐ Set up GDPR/Canada compliance
- ☐ Design email templates
- ☐ Create welcome series
- ☐ Set up automation workflows
- ☐ Train staff on list building

Phase 2: Launch (Q1 2026)

- ☐ Launch in-store signup
- ☐ Begin welcome series
- ☐ Begin weekly email schedule (3x per week)
- ☐ Monitor performance and engagement metrics
- ☐ Optimize based on data

Phase 3: Scale (Q2-Q4 2026)

- ☐ Expand list building methods
 - ☐ Implement segmentation
 - ☐ Launch referral program
 - ☐ Add more automation workflows
 - ☐ Scale email campaigns
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Integration with Other Channels

Website Integration

Once E-commerce Launches: - Website popup for email capture - Checkout email capture - Abandoned cart emails - Order confirmation emails

Social Media Integration

Cross-Promotion: - Promote email list on social media - Share newsletter content on social - Include social links in emails - Drive social followers to email

In-Store Integration

Physical Store: - Tablet signup at checkout - Staff asks every customer - In-store promotions mention email - Display email signup prominently

Related Deliverables

- **Local Newsletter Development:** “Hamilton Chocolate Club” newsletter concept
 - **Social Media Strategy:** Cross-promotion opportunities
 - **Growth Roadmap:** Email list targets and timelines
 - **UGC Strategy:** Email integration for testimonials
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Document Status: Complete

Next Review: After Q1 2026 launch

Last Updated: November 2025