

Corporate Gifting Systematization

Complete Program with Materials - Phase 1 Deliverable #11

Date: November 2025

Prepared for: Dan Edwards, Chocolat on James

Status: Complete

Executive Summary

This document outlines the complete corporate gifting program for Chocolat on James, including program structure, pricing tiers, sales process, templates, and materials. The program is designed to generate \$15-25K in Q4 2025 and \$80-300K annually by Year 2 through systematic B2B sales.

Revenue Potential: \$15-25K Q4 2025, \$80-300K annually by Year 2

Program Overview

Value Proposition

“Corporate Gifts That Actually Stand Out”

Most corporate gifts are: - Generic and forgettable - Not aligned with company values - Difficult to customize at scale - Forgotten within days

Chocolat on James Offers: - Memorable artisanal chocolate - Values-aligned (local, ethical, quality) - Fully customizable (budget, quantity, branding) - Creates lasting impressions - Builds stronger relationships

Pricing Strategy

Tiered Pricing Structure

Tier 1: Appreciation (\$12-18/person) - Target: Large corporate lists (50+ recipients) - Product: Single-origin truffle + branded card - Packaging: Elegant, branded - Use Case: Broad employee appreciation, client thank-yous - Volume Discount: 10-15% for 100+ units

Tier 2: Premium (\$30-45/person) - Target: Mid-size corporate lists (25-50 recipients) - Product: 6-8 piece curated collection - Packaging: Custom packaging, branded cards - Use Case: Top clients, employee recognition, partnerships - Volume Discount: 15-20% for 50+ units

Tier 3: Signature (\$60-100+/person) - Target: VIP clients and executives (10-25 recipients) - Product: Bespoke collection (12-16 pieces) - Packaging: Premium packaging, tasting guide, custom branding - Use Case: Top-tier clients, C-suite, key stakeholders - Volume Discount: 20-30% for 25+ units

Volume Discounts

Discount Structure: - 10-25 units: Standard pricing - 25-49 units: 10% discount - 50-99 units: 15% discount - 100-199 units: 20% discount - 200+ units: 25-30% discount

Custom Pricing: - Annual contracts: Additional 5-10% discount - Recurring orders: Preferred pricing - Large volume (500+): Custom pricing

Pricing Reference

Full Pricing Strategy: - Location: Week 3-4/ALL-DELIVERABLES/PRICING-PRODUCT-STRATEGY-NOV2025.md
- Detailed pricing by tier and volume - Corporate-specific pricing structures

Sales Process

Process Overview

5-Step Sales Process:

- 1. Initial Contact** - Method: Email, phone, or in-person - Goal: Schedule discovery call - Timeline: Within 48 hours
 - 2. Discovery Call (15-30 minutes)** - Understand needs (quantity, budget, timeline) - Identify use case (client gifts, employee recognition, etc.) - Present options and recommendations - Answer questions
 - 3. Proposal (24-48 hours after call)** - Create 2-3 tiered options - Include pricing, timeline, customization options - Send via email with PDF attachment
 - 4. Follow-Up (3-5 days after proposal)** - Check proposal status - Answer additional questions - Negotiate if needed - Close the deal
 - 5. Production & Delivery** - Confirm order details - Produce custom gifts - Deliver on schedule - Follow up for feedback
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Sales Templates

Template Library

Location: Week 3-4/Templates & Tools/2. Template Production/Corporate Outreach Templates/C0J-Corporate-Outreach-Kit.md

Available Templates:

- 1. Cold Email - Corporate Gifting Pitch** - Subject: "Corporate Gifting That Stands Out" - Purpose: Initial outreach to prospects - Timing: Anytime, best Q3-Q4 for holidays
- 2. Follow-Up Email** - Subject: "Following up on corporate gifting" - Purpose: Follow up on initial contact - Timing: 1 week after initial email
- 3. Partnership Inquiry** - Subject: "Collaboration idea: Local Partnership" - Purpose: Explore partnership opportunities - Timing: Ongoing

- 4. One-Pager - Corporate Gifting Overview** - Purpose: Leave-behind document - Content: Program overview, tiers, benefits - Format: PDF, printable
 - 5. Post-Meeting Follow-Up Email** - Subject: “Great meeting—here’s what we discussed” - Purpose: Summarize discovery call - Timing: Within 24 hours of meeting
 - 6. Proposal Email - Formal Offer** - Subject: “Your Corporate Gifting Proposal - Chocolat on James” - Purpose: Formal proposal delivery - Timing: 24-48 hours after discovery call
 - 7. Invoice and Payment Terms Email** - Subject: “Ready to Move Forward? Here’s How” - Purpose: Finalize order and payment - Timing: After proposal acceptance
 - 8. Delivery Confirmation** - Subject: “Your Chocolat on James Gift Order is Ready!” - Purpose: Confirm delivery - Timing: 1-2 days before delivery
 - 9. Phone Script** - Purpose: Initial phone outreach - Goal: Schedule discovery call - Tone: Friendly, low-pressure
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Target Customer Segments

Segment 1: Corporate Clients

Target Companies: - Professional services (law firms, accounting firms) - Financial services (banks, wealth management) - Real estate (brokers, developers) - Healthcare (medical practices, clinics) - Technology companies

Approach: - Client appreciation gifts - Employee recognition programs - Holiday gifting - Event hospitality

Revenue Potential: \$40K-120K annually

Segment 2: Local Businesses

Target Businesses: - Hamilton-based companies - James Street North businesses - GTA businesses (expand to GTA) - Small to medium enterprises (SMEs)

Approach: - Local business partnerships - Cross-promotion opportunities - Community engagement - “Hamilton’s Chocolate” positioning

Revenue Potential: \$20K-60K annually

Segment 3: Institutions & Organizations

Target Organizations: - McMaster University (confirmed event Nov 21-24) - Ti-Cats (corporate partners) - Hospitals and healthcare systems - Non-profit organizations - Government agencies

Approach: - Institutional partnerships - Event partnerships - Employee programs - Donor appreciation

Revenue Potential: \$20K-80K annually

Segment 4: Hotels & Tourism

Target Partners: - Hamilton hotels - Tourism organizations - Event venues - Conference centers

Approach: - Welcome gifts - Corporate suite amenities - Conference hospitality - Visitor packages

Revenue Potential: \$10K-40K annually

Target List Development

Priority Target List (Q4 2025)

Top 50 Prospects: 1. McMaster University (confirmed event Nov 21-24) 2. Ti-Cats corporate partners (20-30 companies) 3. Hamilton law firms (10-15 firms) 4. Hamilton accounting firms (5-10 firms) 5. Hamilton real estate brokers (10-15 brokers) 6. Hamilton healthcare practices (5-10 practices) 7. Hamilton financial services (5-10 companies) 8. Hamilton technology companies (5-10 companies)

Total Potential: 70-110 companies

Expected Conversion: 10-20% = 7-22 accounts

Q4 Revenue Target: \$15K-25K

Materials & Assets

Sales Materials

1. One-Pager (PDF) - Program overview - Pricing tiers - Benefits and value proposition - Contact information - Template: Week 3-4/Templates & Tools/2. Template Production/Corporate Outreach Templates/COJ-Corporate-Outreach-Kit.md

2. Proposal Template (PDF) - Customizable for each prospect - Tiered options - Pricing and timeline - Next steps - Template: Included in outreach kit

3. Product Catalog (PDF) - Product images and descriptions - Pricing by tier - Customization options - Packaging options - Location: Create from existing product information

4. Case Studies/Testimonials - Success stories - Client testimonials - Before/after examples - ROI examples - Location: Create as program matures

Digital Assets

1. Email Templates - Complete email library - Location: Week 3-4/Templates & Tools/2. Template Production/Corporate Outreach Templates/COJ-Corporate-Outreach-Kit.md

2. Phone Scripts - Initial outreach script - Discovery call script - Follow-up script - Location: Included in outreach kit

3. Proposal Templates - Customizable proposal format - Tiered pricing structure - Timeline templates - Location: Included in outreach kit

Customization Options

Branding Options

1. **Custom Packaging** - Branded gift boxes - Custom labels - Company logos - Branded cards with company message
 2. **Custom Cards** - Company message - Personalized notes - Branded design - Professional presentation
 3. **Custom Products** - Bespoke collections - Seasonal customization - Dietary requirements - Special requests
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Workflow System

Order Management Process

1. **Lead Capture** - Incoming inquiries (email, phone, website) - Log in CRM or spreadsheet - Assign to Dan or sales lead - Response within 24 hours
 2. **Discovery Call** - Schedule call (15-30 minutes) - Understand needs (quantity, budget, timeline) - Present options - Answer questions - Take notes
 3. **Proposal Creation** - Select appropriate tier(s) - Customize proposal - Include pricing, timeline, customization options - Send within 24-48 hours
 4. **Follow-Up** - Follow up 3-5 days after proposal - Answer additional questions - Negotiate if needed - Close the deal
 5. **Order Confirmation** - Confirm order details - Collect payment (50% deposit standard) - Set production timeline - Confirm delivery date
 6. **Production** - Create custom gifts - Apply branding/packaging - Quality check - Prepare for delivery
 7. **Delivery** - Deliver on schedule - Confirm delivery - Follow up for feedback - Request testimonial (if appropriate)
 8. **Follow-Up** - Thank you email - Request feedback - Annual follow-up for repeat orders - Maintain relationship
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Automation Opportunities

Email Automation

1. **Welcome Email (After Inquiry)** - Thank for interest - Provide overview - Schedule call CTA - Automated within 24 hours
2. **Follow-Up Email (If No Response)** - Reminder email - Additional information - Schedule call CTA - Automated 1 week after inquiry

3. Post-Delivery Email - Thank you message - Request feedback - Annual reminder - Automated 1 week after delivery

CRM Integration

Recommended: - Google Sheets (simple, free) - HubSpot (free tier, good for small business) - Zoho CRM (affordable, scalable) - Custom spreadsheet (simple, effective)

Tracking: - Lead source - Contact information - Status (inquiry, proposal, closed) - Revenue by account - Repeat order tracking

Revenue Projections

Q4 2025 (Nov-Dec 2025)

Target: \$15K-25K

Breakdown: - Accounts: 7-15 corporate accounts - Average Order: \$2,000-3,500 - Timing: Holiday corporate gifting season - Conversion: 10-20% of prospects

Tactics: - Aggressive outreach (50-100 companies) - Holiday urgency messaging - Quick turnaround offers - Hamilton local focus

Year 1 (2026)

Target: \$37K-97K

Breakdown: - Q1: \$5K-10K (post-holiday, Valentine's) - Q2: \$8K-15K (Mother's Day, spring) - Q3: \$6K-12K (summer, corporate summer) - Q4: \$18K-60K (holiday season)

Accounts: - New accounts: 20-40 per year - Repeat accounts: 30-50% repeat rate - Average account value: \$1,500-3,000

Year 2 (2027)

Target: \$80K-300K

Breakdown: - Mature program - Recurring accounts: 40-60 - New accounts: 30-50 per year - Average account value: \$2,000-4,000 - Annual contracts: 10-20 accounts

Success Metrics

Key Performance Indicators

Sales Metrics: - Leads generated (target: 100-200 Year 1) - Conversion rate (target: 15-25%) - Average order value (target: \$2,000-3,500) - Revenue per account (target: \$2,000-3,000) - Repeat order rate (target: 30-50%)

Process Metrics: - Response time (target: <24 hours) - Proposal turnaround (target: 24-48 hours) - Close rate (target: 15-25%) - Customer satisfaction (target: 4.5+ stars)

Revenue Metrics: - Q4 2025 revenue (target: \$15K-25K) - Year 1 revenue (target: \$37K-97K) - Year 2 revenue (target: \$80K-300K) - Growth rate (target: +100% Year 2)

Implementation Timeline

Phase 1: Launch (Q4 2025 - Nov-Dec)

Week 1 (Nov 7-14): - ☐ Finalize pricing structure - ☐ Prepare sales materials - ☐ Create target list (50-100 companies) - ☐ Launch initial outreach

Week 2-3 (Nov 15-28): - ☐ Follow up on inquiries - ☐ Schedule discovery calls - ☐ Create proposals - ☐ Close first deals

Week 4 (Nov 29 - Dec 6): - ☐ Execute McMaster event (Nov 21-24) - ☐ Generate corporate leads from event - ☐ Follow up on event leads - ☐ Close Q4 deals

Dec 2025: - ☐ Fulfill Q4 orders - ☐ Deliver on schedule - ☐ Follow up for feedback - ☐ Plan Q1 2026 outreach

Phase 2: Scale (Q1-Q4 2026)

Q1 2026: - ☐ Valentine's corporate campaigns - ☐ Post-holiday follow-up - ☐ New account acquisition - ☐ Revenue: \$5K-10K

Q2-Q4 2026: - ☐ Ongoing account acquisition - ☐ Recurring order management - ☐ Seasonal campaigns - ☐ Annual contracts - ☐ Revenue: \$32K-87K additional

Related Deliverables

- **Pricing & Product Strategy:** Corporate pricing tiers and structures
 - **Partnership Opportunity Map:** Ti-Cats, McMaster, hotels, tourism
 - **Corporate Outreach Templates:** Complete email and phone templates
 - **Growth Roadmap:** Corporate gifting revenue targets
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Document Status: Complete

Next Review: After Q4 2025 launch

Last Updated: November 2025