

# Follow-up Strategy

## 30-Day and 60-Day Check-ins - Phase 1 Deliverable #18

**Date:** November 2025

**Prepared for:** Dan Edwards & Dale, Chocolat on James

**Status:** Complete

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### Executive Summary

This document outlines the follow-up strategy for Phase 1 deliverables, including 30-day and 60-day check-ins, success metrics review, implementation support, and ongoing relationship management. The strategy ensures successful implementation of Phase 1 recommendations and maintains alignment with business goals.

**Check-in Schedule:** 30-day and 60-day post-submission

**Support Model:** Ongoing implementation support

**Success Tracking:** Key performance indicators (KPIs)

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### Follow-up Framework

#### Objectives

- 1. Implementation Support** - Ensure successful Phase 1 implementation - Address questions and challenges - Provide ongoing guidance - Optimize based on data
  - 2. Success Measurement** - Track key performance indicators (KPIs) - Review progress against targets - Identify optimization opportunities - Adjust strategy as needed
  - 3. Relationship Management** - Maintain ongoing communication - Build long-term partnership - Support Phase 2 planning - Ensure client satisfaction
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### Check-in Schedule

#### 30-Day Check-in (Post-Submission)

**Timing:** 30 days after Phase 1 submission

**Purpose:** Initial implementation review and support

**Duration:** 60-90 minutes

#### Agenda:

- 1. Implementation Status Review (15 minutes)** - Review Phase 1 deliverables understanding - Identify implemented recommendations - Discuss progress on priority actions - Address questions or clarifications
- 2. Q4 2025 Progress Review (20 minutes)** - Corporate gifting launch status - McMaster event execution (Nov 21-24) - Google Business Profile optimization - Email list building progress - Holiday marketing execution

**3. Challenges & Opportunities (20 minutes)** - Identify implementation challenges - Discuss resource constraints - Review timeline adjustments - Identify additional support needs

**4. Q1 2026 Preparation (20 minutes)** - E-commerce launch planning (Pavement) - Product photography scheduling - Platform setup progress - Valentine's Day campaign planning - Pricing implementation planning

**5. Next Steps & Action Items (10 minutes)** - Define action items - Set 30-day goals - Schedule 60-day check-in - Document decisions

**Deliverables:** - 30-day check-in summary document - Updated implementation timeline - Revised action items - Next steps documentation

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## **60-Day Check-in (Post-Submission)**

**Timing:** 60 days after Phase 1 submission

**Purpose:** Mid-term progress review and optimization

**Duration:** 90-120 minutes

### **Agenda:**

**1. Progress Review (30 minutes)** - Review 30-day action items - Assess implementation progress - Review KPIs and metrics - Identify wins and challenges

**2. Performance Analysis (20 minutes)** - Review revenue performance (Q4 2025) - Analyze channel performance - Review marketing metrics - Assess ROI on investments

**3. Strategy Optimization (30 minutes)** - Identify optimization opportunities - Adjust strategy based on data - Revise timelines if needed - Prioritize high-impact actions

**4. Q1 2026 Launch Preparation (20 minutes)** - E-commerce launch readiness - Product photography status - Platform setup completion - Valentine's Day campaign readiness - Pricing implementation status

**5. Phase 2 Planning (20 minutes)** - Review Phase 2 recommendations - Discuss Phase 2 priorities - Plan Phase 2 kickoff - Set Phase 2 goals

**Deliverables:** - 60-day check-in summary document - Performance analysis report - Optimized implementation plan - Phase 2 preparation checklist - Next steps documentation

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## **Success Metrics Tracking**

### **Key Performance Indicators (KPIs)**

#### **Q4 2025 Metrics:**

**Corporate Gifting:** - Accounts acquired: Target 7-15 - Revenue generated: Target \$15K-25K - Pipeline value: Track ongoing - Conversion rate: Track % closed

**McMaster Event (Nov 21-24):** - Pre-orders: Target \$5K-10K - Email captures: Target 100-200 - Corporate leads: Target 10-20 - Event execution: Success criteria met

**Google Business Profile:** - Profile completion: Target 100% - Photo uploads: Target 50+ - Review count: Target 10+ by check-in - Local Pack ranking: Track position

**Email List:** - Subscriber count: Target 300-500 by year-end - Growth rate: Track monthly - Open rate: Track campaign performance - Conversion rate: Track email revenue

**Holiday Marketing:** - Social media posts: Target 30+ posts - Email campaigns: Target 3-5 campaigns - Revenue impact: Track holiday sales - Engagement metrics: Track social engagement

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## **Q1 2026 Metrics (60-Day Check-in)**

**E-commerce Launch:** - Platform setup: Complete/in progress - Product uploads: Target 40-60 SKUs - Soft launch: Complete/in progress - Public launch: On track/complete

**Pricing Implementation:** - New pricing: Implemented/in progress - Customer response: Track feedback - Revenue impact: Track pricing impact - Adjustment needs: Identify if any

**SEO Implementation:** - On-page optimization: Complete/in progress - Blog launch: On track - Local citations: Target 20+ by check-in - Review generation: Target 25+ by check-in

**Email Marketing:** - Subscriber count: Target 800-1,200 by check-in - Automation workflows: Implemented/in progress - Campaign performance: Track metrics - Revenue from email: Track email revenue

**Valentine's Campaign:** - Campaign launch: On track - Revenue target: Track performance - Email performance: Track campaign metrics - Social media performance: Track engagement

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## **Implementation Support**

### **Ongoing Support Model**

**Support Channels:** - Email support: Ongoing questions and clarifications - Phone support: Scheduled calls as needed - Video calls: Monthly check-ins - Documentation: Updated guides and resources

**Support Scope:** - Phase 1 deliverables clarification - Implementation guidance - Strategy optimization - Best practices sharing - Resource recommendations

**Response Time:** - Email: 24-48 hours - Phone: Scheduled within 48 hours - Urgent issues: Same-day response

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### **Resource Access**

**Documentation:** - All Phase 1 deliverables available - Implementation guides - Template libraries - Best practices documents

**Tools & Templates:** - 50+ Canva templates - Email automation workflows - Corporate gifting templates - SEO optimization guides

**Updates:** - New resources added as available - Updated templates as needed - Best practices updates - Industry trends sharing

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## Check-in Preparation

### Pre-Check-in Checklist

**30-Day Check-in:** - ☐ Review all Phase 1 deliverables - ☐ Document implementation progress - ☐ Prepare questions and challenges - ☐ Gather metrics and data - ☐ Review action items from submission

**60-Day Check-in:** - ☐ Review 30-day check-in summary - ☐ Update implementation progress - ☐ Gather performance metrics - ☐ Prepare optimization questions - ☐ Review Phase 2 recommendations

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### Post-Check-in Follow-up

**Within 48 Hours:** - ☐ Send check-in summary document - ☐ Document action items - ☐ Update implementation timeline - ☐ Share additional resources as needed

**Within 1 Week:** - ☐ Address any outstanding questions - ☐ Provide additional support as needed - ☐ Share best practices or resources - ☐ Schedule next check-in

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## Communication Schedule

### Regular Communication

**Weekly (Optional):** - Email updates on progress - Quick questions via email - Resource sharing as needed

**Bi-Weekly (If Needed):** - Progress check-in calls - Strategy discussions - Implementation support

**Monthly (Standard):** - Formal check-in (30-day and 60-day) - Performance review - Strategy optimization - Next steps planning

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### Communication Channels

**Primary Channels:** - Email: Day-to-day communication - Phone: Scheduled calls for discussions - Video: Monthly check-ins - Documentation: Written summaries and guides

**Preferred Method:** - Email for questions and updates - Phone/video for discussions and reviews - Documentation for formal summaries

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## Action Item Tracking

### Action Item Management

**Documentation:** - Track all action items from check-ins - Assign ownership and deadlines - Monitor completion status - Update in subsequent check-ins

**Follow-up:** - Review action items in each check-in - Assess completion status - Identify blockers or challenges - Adjust deadlines as needed

**Accountability:** - Clear ownership assignments - Specific deadlines - Progress tracking - Completion confirmation

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## Success Criteria

### Phase 1 Success Metrics

**Implementation Success:** - All Phase 1 deliverables reviewed and understood - Priority actions implemented (corporate gifting, McMaster event, Google Business Profile) - Q1 2026 preparation on track (e-commerce, pricing, SEO)

**Performance Success:** - Q4 2025 revenue targets met or on track - Corporate gifting launched successfully - McMaster event executed successfully - Email list building progressing

**Strategic Success:** - Clear path to Q1 2026 e-commerce launch - Pricing implementation planned - Marketing automation progressing - Phase 2 preparation on track

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## Long-term Relationship

### Ongoing Partnership

**Phase 2 Support:** - Phase 2 implementation support - Ongoing strategy optimization - Performance monitoring - Best practices sharing

**Future Phases:** - Phase 3 planning support - Long-term growth strategy - Ongoing optimization - Partnership development

**Value Delivery:** - Continued strategic guidance - Implementation support - Performance optimization - Long-term growth planning

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## Related Deliverables

- **Executive Summary:** Comprehensive Phase 1 findings
  - **Phase 2 Recommendations:** E-commerce implementation plan
  - **Growth Roadmap:** 12-month execution plan
  - **All Phase 1 Deliverables:** 18 documents for reference
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## Next Steps

### Immediate Actions (Post-Submission)

1. **Review All Deliverables** - 18 documents ready for review
2. **Prioritize Implementation** - Focus on Q4 2025 priorities
3. **Begin Q1 2026 Preparation** - Start e-commerce planning
4. **Track Progress** - Document implementation progress
5. **Schedule 30-Day Check-in** - Plan follow-up meeting

### 30-Day Check-in (December 2025)

1. **Review Implementation Progress** - Assess Q4 2025 actions
2. **Discuss Challenges** - Address implementation questions
3. **Plan Q1 2026 Launch** - E-commerce and pricing implementation
4. **Set Next Steps** - Define 30-day action items
5. **Schedule 60-Day Check-in** - Plan next follow-up

### 60-Day Check-in (January 2026)

1. **Review Performance** - Q4 2025 results and Q1 2026 progress
2. **Optimize Strategy** - Adjust based on data
3. **Plan Phase 2** - Discuss Phase 2 priorities
4. **Set Phase 2 Goals** - Define Phase 2 objectives
5. **Plan Ongoing Support** - Long-term partnership

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## Conclusion

The follow-up strategy ensures successful Phase 1 implementation through structured check-ins, performance tracking, and ongoing support. The strategy maintains alignment with business goals, optimizes implementation based on data, and supports long-term growth planning.

**Key Takeaways:** 1. Structured 30-day and 60-day check-ins 2. Comprehensive KPI tracking 3. Ongoing implementation support 4. Long-term partnership focus

**Ready for:** - Post-submission support - Implementation guidance - Performance optimization - Long-term growth planning

**Next Steps:** Schedule 30-day check-in

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**Document Status:** Complete

**Prepared for:** Dan Edwards & Dale, Chocolat on James

**Submission Date:** November 2025

**Ready for Implementation:** Yes