

Business Growth Proposal for Chocolat on James

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Date: October 14, 2025
Confidential

EXECUTIVE SUMMARY

Chocolat on James stands at a critical juncture. As a new owner with fresh energy and long-term commitment, Dan has acquired an 11-year-old artisan chocolate business in Hamilton's vibrant James Street North arts district. The business currently generates \$537,000 in annual revenue but has declined 28% from its 2021 peak of \$751,000 due to zero marketing investment and lack of digital presence.

The Situation:

- **Current Revenue:** \$537,000 annually (100% walk-in traffic)
- **Zero Marketing:** No advertising, no e-commerce, no customer database
- **Extreme Seasonality:** 5.2x variance (December \$89K vs. January \$17K)
- **Owner Workload:** 84+ hours per week (unsustainable)
- **Market Position:** Strong product and location, but digitally invisible

The Opportunity: Despite challenges, Chocolat on James operates in favorable conditions with significant untapped potential:

- Premium chocolate market growing 5-8% annually
- Hamilton market underserved in artisan chocolate
- James Street North location draws 5,000-10,000 monthly Art Crawl visitors
- All major competitors have e-commerce—table stakes for survival
- Multiple revenue streams ready to activate

The Solution: Transform from declining single-channel retail to thriving multi-channel artisan chocolate business through strategic investment in digital infrastructure, marketing, and business systems.

Year 1 Target: \$650-700,000 revenue (+21-30% growth)

Recommended Approach: 2-Phase Engagement

- **Phase 1: Foundation & Strategy (Oct-Dec 2025) - \$4,500**
- **Phase 2: E-Commerce Implementation (Jan-Mar 2026) - TBD (Quoted after Phase 1)**
- **Total Investment: \$4,500 (Phase 1) + TBD (Phase 2) + tools/marketing**

Expected Outcomes:

- **Phase 1: Complete business analysis, corporate gifting quick wins, 12-month roadmap**
- **Phase 2: Launch e-commerce platform generating \$75-100K first year**
- **Build email database driving \$30-45K in repeat purchases**
- **Reduce owner hours from 84/week to 60-70/week by year-end**

- Establish foundation for \$850K+ Year 2 and \$1.1-1.3M Year 3

Return on Investment:

- Phase 1 pays for itself in 2-3 months (corporate blitz)
- Phase 2 pays for itself in 4-6 months (e-commerce sales)
- Combined 3-6x return Year 1
- Years 2-3: Pure profit from systems built

Why This Will Work:

1. **Proven Strategies** - All tactics industry-standard, used successfully by competitors
 2. **Favorable Conditions** - Growing market, strong location, quality product
 3. **Controllable Factors** - All problems are internal and fixable
 4. **AI-Powered Efficiency** - Modern tools reduce costs 75% vs. traditional agencies
 5. **Strong Economics** - 70-75% gross margins provide cushion for investment
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CURRENT STATE ANALYSIS

A. Revenue Performance

Annual Revenue: \$537,438 (June 2024 - May 2025)

Historical Decline:

- 2021 Peak: \$751,222
- 2025 Current: \$537,438
- **Total Decline:** -\$214,000 (-28.5%) over 4 years

Monthly Seasonality (Index: 100 = \$44,787 average):

Month	Revenue	Index	Classification
		x	
December	\$88,856	198.4	Peak Season
September	\$57,025	127.3	High Season
June	\$55,082	123.0	High Season
January	\$17,359	38.8	Critical Low

Key Finding: Extreme 5.2x seasonality creates operational stress and cash flow volatility. December revenue carries the business while January barely covers fixed costs.

Revenue Channels:

- Walk-in retail: 100% (\$537,000)

- *E-commerce: 0%*
- *Corporate gifting: Ad-hoc only (minimal)*
- *Wholesale: 0%*
- *Critical Gap: Single-channel dependency creates extreme vulnerability*

B. Operational Gaps

Current Reality:

- **No e-commerce platform** - Cannot sell online
- **No email marketing** - No customer database (0 subscribers)
- **No inventory tracking** - Informal systems only
- **No corporate program** - Missing \$50-100K opportunity
- **No financial systems** - Limited visibility into performance
- **Zero marketing spend** - Not advertising anywhere

Owner Situation:

- *Dan works 84+ hours per week (12 hours × 7 days)*
- *Unsustainable workload leading to burnout risk*
- *Handles production, retail, management, everything*
- *No systems to leverage or delegate*
- *Business dependent on Dan's constant presence*

C. Competitive Position

Based on comprehensive competitive analysis of 7 chocolate retailers:

What Chocolat on James HAS:

- Quality handmade artisan chocolates
- Prime James Street North location
- Ice cream bar (seasonal differentiation)
- 11 years established brand
- Vegan-friendly options
- Local Hamilton identity

What Competitors Have That We DON'T:

- E-commerce websites (100% of competitors)
- Product pricing displayed online (100%)
- Email marketing (100%)
- Professional product photography (85% - Dan's responsibility)
- Corporate gifting programs (80%)
- Customer review systems (60%)
- Custom gift builders (40%)

Market Position:

- **Purdy's (national chain):** Full e-commerce, 200+ SKUs, build-a-box tool, \$15-174 pricing
- **SOMA Chocolatemaker (Toronto premium):** Shopify site, corporate program, bean-to-bar positioning

- **Chocolate Tales** (Hamilton competitor): WooCommerce site, nut-free specialist, workshops, corporate pricing online
- **Chocolat on James**: Quality product but digitally invisible—falling behind monthly

Bottom Line: We're 3-5 years behind in digital presence. Every month without e-commerce means lost revenue and market share to competitors.

D. Untapped Assets

Location Advantages:

- James Street North monthly Art Crawl: 5,000-10,000 visitors
- Growing neighborhood (15 new condo buildings, 7,500-9,000 residents within 2km)
- McMaster University: 40,000 students and thousands of employees nearby
- Downtown Hamilton corporate offices
- Hamilton tourism destination

Product Strengths:

- Handmade artisan quality
- Multi-product offering (chocolate + ice cream + coffee)
- Established recipes and production capability
- Vegan options (market differentiator)
- Seasonal specialty expertise

Team Assets:

- Dan: Fresh ownership energy, long-term commitment
- Daughter (Tory): Can manage social media
- Partner (Dale): Wants to run online operations
- Production team: Established chocolate-making capability

Market Opportunity:

- Hamilton population: 569,000 (5th largest city in Ontario)
 - Trade area: 26,080 households, \$65,575 average income
 - Projected 50% population growth in James North area
 - Limited direct artisan chocolate competition locally
 - Opportunity to dominate "Hamilton's chocolatier" positioning
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GROWTH OPPORTUNITIES

Based on competitive analysis, market research, website audit, and financial analysis, five major opportunities exist:

Opportunity 1: E-Commerce Launch

Revenue Potential: \$90-100,000 Year 1, \$280,000 Year 2

The Problem:

- 100% of analyzed competitors have e-commerce
- Artisan chocolate sees 25-30% of sales online (industry benchmark)
- Chocolat on James: 0% online sales
- Losing customers daily to competitors with websites

The Solution:

- Launch Shopify-based e-commerce website
- Product photography guidance (Dan handles photography)
- Local pickup + same-day Hamilton delivery
- Regional shipping (Ontario-wide)
- Mobile-optimized, fast, secure

Requirements:

- Shopify Standard plan: \$105/month CAD
- Essential apps: \$30-50/month (email, reviews, shipping)
- Professional photography: \$2,000-4,000 (or \$500 DIY with equipment)
- Product descriptions: 30-50 products
- Payment processing: Shopify Payments (2.9% + \$0.30)

Timeline: 90 days from decision to public launch

Investment: \$15,000 total (\$3,000 bootstrap approach)

Tactics:

1. **Month 1-2:** Setup Shopify, theme customization, photography, content creation
2. **Month 3:** Soft launch to known customers, testing, optimization
3. **Month 4:** Full public launch with marketing campaign
4. **Ongoing:** Email marketing, abandoned cart recovery, optimization

Year 1 Revenue Model:

- Month 3: \$2,000 (soft launch)
- Month 4-6: \$5,000-8,000/month (building momentum)
- Month 7-12: \$8,000-12,000/month (optimized)
- **Total Year 1:** \$90-100,000

Key Success Factors:

- Professional photography (kills conversion if poor)
- Same-day local delivery (competitive advantage)
- Marketing investment to drive traffic (can't rely on organic alone)
- Email capture from day 1 (build the database)
- Excellent fulfillment (every order is brand impression)

Opportunity 2: Corporate Gifting Systematization

Revenue Potential: \$40-50,000 Year 1, \$130,000 Year 2

The Problem:

- Corporate gifting market is \$258 billion annually
- Typical corporate order: \$300-2,000 (vs. \$50 retail)
- Chocolat on James: Ad-hoc only, no systematic approach
- Hamilton businesses prefer supporting local suppliers
- Missing predictable, high-value revenue stream

The Solution: Develop and market B2B corporate gifting program targeting Hamilton businesses

Requirements:

- Corporate product line (tiered pricing: \$25-\$200+)
- Professional corporate brochure and catalog
- Volume discount structure (10% at 10 units, 15% at 25, 20% at 100+)
- Corporate landing page on website
- Samples for qualified prospects
- LinkedIn presence and outreach

Timeline: Launch Month 2-3, Q4 holiday focus

Investment: \$2,000-7,000 (materials, samples, outreach)

Target Segments:

1. **Small-Medium Businesses** (10-100 employees): 25-50 Hamilton businesses
2. **Professional Services** (law, accounting, consulting): 10-20 firms
3. **Real Estate Agencies** (closing gifts, open houses): 15-30 agents
4. **Tech Companies** (employee perks, client gifts): 5-15 companies
5. **McMaster University** (departments, events, donors): 5-10 departments

Tactics:

1. **Prospecting:** Build list of 100-150 Hamilton businesses
2. **Outreach:** LinkedIn, email, phone, in-person networking
3. **Sampling:** Send complimentary boxes to decision-makers
4. **Q4 Focus:** Book holiday orders in September-October
5. **Personal Touch:** Dan builds relationships (B2B is relationship business)

Pricing Structure:

- 6-piece box: \$28 (individual), \$24 (10+ units)
- 12-piece box: \$58 (individual), \$49 (10+ units)
- 24-piece box: \$108 (individual), \$92 (10+ units)
- Custom branding: +\$2-3 per box
- Bulk discounts maintain 65-70% gross margin

Year 1 Revenue Model:

- Q1 (Jan-Mar): \$2,000 (relationship building)

- Q2 (Apr-Jun): \$5,000 (*early orders*)
- Q3 (Jul-Sep): \$3,000 (*holiday booking*)
- Q4 (Oct-Dec): \$30,000 (*holiday execution*)
- **Total Year 1:** \$40,000-50,000 from 15-25 corporate clients

Key Success Factors:

- Professional materials (brochure, catalog, samples)
 - Personal relationship development (Dan's role)
 - Flawless execution (corporate reputation matters)
 - Early holiday booking (outreach starts September)
 - Simple ordering process (online corporate portal)
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Opportunity 3: Email Marketing & Database Building

Revenue Potential: \$30-45,000 Year 1 (15-20x ROI)

The Problem:

- No customer database (0 email subscribers)
- Cannot communicate with past customers
- No retention marketing
- Losing customers permanently with no follow-up
- Email delivers highest ROI of any marketing channel (15-20x typical)

The Solution: Build email subscriber list from zero and implement automated marketing

Requirements:

- Email platform (Klaviyo recommended): \$20-60/month
- Email capture popup on website (incentive: 10% off first order)
- In-store signup tablet
- Automated email flows
- Weekly/bi-weekly campaigns

Timeline: Begin immediately (Day 1)

Investment: \$500-3,000 (platform + setup + first year)

Tactics:

Email Capture Methods:

1. Website popup: "Get 10% off your first order"
2. In-store tablet signup at checkout
3. Business card drop box
4. Art Crawl special signup offer
5. Social media lead generation
6. Every online checkout (opt-in pre-checked)

Automated Email Flows:

1. **Welcome Series** (3 emails over 2 weeks):
 - Email 1 (Day 0): Welcome + 10% discount code
 - Email 2 (Day 3): Our story + bestsellers
 - Email 3 (Day 14): How to order + shipping info
2. **Abandoned Cart Recovery** (3 emails):
 - Email 1 (1 hour): "You left something sweet behind"
 - Email 2 (24 hours): Product images + customer reviews
 - Email 3 (72 hours): Last chance + 10% discount
3. **Post-Purchase** (2 emails):
 - Email 1 (Delivery + 1 day): Thank you + care tips
 - Email 2 (7 days): Review request + referral incentive
4. **Win-Back** (lapsed customers, 60+ days):
 - Email 1: "We miss you" + new products
 - Email 2 (7 days later): Special comeback offer (15% off)

Email Campaigns (Manual, 2-4 per month):

- Weekly or bi-weekly newsletter
- New product launches
- Holiday promotions (Valentine's, Mother's Day, Christmas)
- Behind-the-scenes stories
- Exclusive subscriber offers
- Seasonal recipes and pairings
- Art Crawl event announcements

Year 1 Growth Target:

- Month 1: 50 subscribers
- Month 3: 150 subscribers
- Month 6: 500 subscribers
- Month 9: 1,000 subscribers
- Month 12: 1,500-2,000 subscribers
- Growth rate: 100-150 new subscribers per month

Expected Performance:

- Open rate: 25-35%
- Click-through rate: 3-5%
- Conversion rate: 2-4%
- Revenue per subscriber: \$20-30 annually
- Unsubscribe rate: <0.5%

Year 1 Revenue Model:

- Automated flows (abandoned cart, win-back): \$15,000
- Campaign emails (promotions, launches): \$15,000-30,000
- **Total Year 1: \$30,000-45,000**

Key Success Factors:

- Compelling signup incentive (10% off works)
- Capture at every touchpoint (website, store, events)
- Quality content (60% value, 40% promotional)
- Mobile optimization (50%+ open emails on phone)
- Segmentation (gift buyers vs. self-purchasers)

Opportunity 4: Local Partnerships

Revenue Potential: \$15-25,000 Year 1

The Problem:

- *Operating in isolation*
- *Missing cross-promotion opportunities*
- *Not leveraging Hamilton tourism ecosystem*
- *Competitors building partnership networks*

The Solution: Strategic partnerships with complementary Hamilton businesses and organizations

Priority Partnerships:

1. Tourism Hamilton (High Priority)

- **Opportunity:** Visitor guide inclusion, tourism packages, media tours
- **Investment:** \$500-1,000 (membership + materials)
- **Revenue:** \$8,000-15,000 from increased tourist traffic
- **Timeline:** Month 1-2 (quick win)

2. Hamilton Hotels (High Priority)

- **Partners:** Sheraton, Homewood Suites, Visitors Inn
- **Models:** Welcome amenities, gift shop retail, room service, event catering
- **Investment:** \$500-1,000 per hotel (samples, setup)
- **Revenue:** \$2,000-10,000 per hotel annually
- **Timeline:** Month 2-4

3. Coffee Roasters & Cafes (Medium Priority)

- **Partners:** Mulberry Coffee, Democracy Coffee, Detour Coffee
- **Models:** Cross-merchandising, pairing events, wholesale supply
- **Investment:** \$300-500 per partnership
- **Revenue:** \$1,000-2,000 per cafe annually
- **Timeline:** Month 3-6

4. James Street North Business Association (High Priority - Quick Win)

- **Opportunity:** Art Crawl collaborations, joint marketing, passport program
- **Investment:** \$500 membership
- **Revenue:** \$5,000-8,000 additional Art Crawl sales
- **Timeline:** Immediate

5. Real Estate Agencies (Medium Priority)

- **Model:** Preferred closing gift provider, open house amenities

- **Investment:** \$1,000-2,000 (materials, samples)
- **Revenue:** \$5,000-10,000 (10-15 active agents)
- **Timeline:** Month 4-8

Total Investment: \$2,000-5,000

Total Year 1 Revenue: \$15,000-25,000

Intangible Value: Brand exposure, relationship network, market intelligence

Key Success Factors:

- Win-win structure (mutual benefit)
 - Start with 1-2, prove model, then scale
 - Personal relationship building
 - Clear terms and expectations
 - Regular communication and check-ins
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Opportunity 5: Seasonal Optimization & Product Strategy

Revenue Potential: \$10-15,000 Year 1 incremental

The Problem:

- Extreme seasonality (5.2x variance)
- December \$89K (16.6% of annual) vs. January \$17K (3.2%)
- Cash flow volatility creates stress
- Underperforming in February despite Valentine's Day
- Missing opportunities in slow months

The Solution: Strategic seasonal product launches and campaigns to smooth revenue curve

Seasonal Calendar:

January (Currently \$17K - Target \$23K):

- "New Year, Treat Yourself" campaign
- Self-care chocolate positioning
- Valentine's Day pre-orders
- Dark chocolate with health angle
- Corporate Q1 gifting push

February (Currently \$31K - Target \$50K):

- Valentine's Day (major focus)
- Email campaign series (4 emails)
- Limited edition Valentine's collection
- Instagram/social media romantic content
- Last-minute delivery emphasis
- Gift guide content

March-April (Easter):

- Easter collection launch (4-6 weeks before)

- *Spring flavors and pastel packaging*
- *Email announcement to subscribers*
- *Social media countdown*
- *Local media feature*

May (Mother's Day):

- *Mother's Day collection*
- *Gift guide email campaign*
- *"Celebrate Mom" social content*
- *Last-minute delivery promoted*
- *Corporate orders for employee gifts*

September (Back-to-School):

- *Fall flavors introduction*
- *Teacher gift options*
- *Corporate Q4 planning outreach*
- *Supercrawl presence*
- *Email campaign: "Fall Favorites"*

October-November (Holiday Prep):

- *Halloween collection (limited)*
- *Early bird holiday booking (corporate)*
- *"Book now for December" campaign*
- *Corporate catalog distribution*
- *Holiday gift guide emails*

December (Peak - Optimize):

- *Holiday collection at full capacity*
- *Last-minute gift emphasis*
- *Extended hours promotion*
- *Same-day delivery advantage*
- *Corporate order fulfillment*

Investment: \$5,000-8,000 per major season (5 seasons = \$25-40K)

Expected Impact:

- *January revenue: +35% (\$17K → \$23K)*
- *February revenue: +60% (\$31K → \$50K)*
- *Reduced peak-to-low ratio from 5.2x to 4x*
- *Smoother cash flow throughout year*
- *Better inventory planning*
- *Media attention for seasonal launches*

Key Success Factors:

- *Launch 4-6 weeks before holiday*
- *Limited availability creates urgency*
- *Professional photography for seasonal products*
- *Email announcement to full list*
- *Social media countdown and teasers*
- *Press releases to local media*

TOTAL OPPORTUNITY SUMMARY

Opportunity	Year 1 Revenue	Investment	ROI	Priority
E-Commerce	\$90-100K	\$3,000-15K	6-33x	● CRITICAL
Corporate Gifting	\$40-50K	\$2,000-7K	6-25x	● CRITICAL
Email Marketing	\$30-45K	\$500-3K	10-90x	● CRITICAL
Local Partnerships	\$15-25K	\$2,000-5K	3-13x	● HIGH
Seasonal Optimization	\$10-15K	\$5,000-8K	1.2-3x	● HIGH
TOTAL	\$185-235K	\$12.5-38K	5-19x	

Net New Revenue (after cannibalization): \$135-180K

Target Year 1 Revenue: \$650-700K (from \$537K = +21-30% growth)

RECOMMENDED APPROACH: 2-Phase Engagement

Why 2-Phase Structure?

The Smart Approach:

- **Phase 1 (Oct-Dec):** Strategy, planning, and quick wins while you're BUSY with holiday season
- **Phase 2 (Jan-Mar):** E-commerce implementation during your SLOW season

This timing makes perfect sense because:

-  October-December is your busiest period—you don't have time to learn e-commerce
-  Corporate gifting for Q4 holidays generates immediate revenue

- Complete research and planning BEFORE committing to Phase 2 execution
- January-March is slowest season—perfect time to launch e-commerce
- Prove value with Phase 1 before you commit to Phase 2
- Both of us avoid holiday chaos—better timing alignment

The Traditional Problem: Most agencies want \$30-50K upfront for everything at once. That's risky and bad timing.

Our Solution: Start with \$4,500 strategy phase. You get complete blueprint. Then DECIDE if you want to proceed with Phase 2 e-commerce implementation.

PHASE 1: FOUNDATION & STRATEGY (Oct-Dec 2025)

Duration: 4-6 weeks

Investment: \$4,500

Focus: Research, planning, systems, and QUICK WINS (corporate blitz)

Timing: Perfect—happens during your holiday busy season (we do research while you run business)

Phase 1: What You Get

Week 1-2: Discovery & Analysis

1. **Competitive Analysis** (Local + national benchmarks)
 - Deep dive into 10+ chocolate competitors
 - Pricing strategies and positioning
 - E-commerce capabilities comparison
 - Corporate program analysis
 - What's working (and what's not)
2. **Website Audit** (Your current site)
 - Technical SEO assessment
 - Mobile performance analysis
 - E-commerce requirements documentation
 - Platform recommendation (Shopify vs. WooCommerce vs. others)
 - Cost comparison and ROI projection
3. **Financial Analysis** (AI-driven analysis of your data)
 - Revenue trends and seasonality deep dive
 - Break-even analysis
 - 3-year growth projections (conservative, base, aggressive scenarios)
 - Investment ROI modeling
 - Cost structure benchmarking vs. industry standards
 - Note: Analysis only—we don't do hands-on bookkeeping or system setup
4. **Market Research** (Hamilton opportunity sizing)
 - James Street North demographic analysis
 - McMaster University market potential
 - Corporate gifting market sizing
 - Tourism partnership opportunities
 - Local partnership landscape

Week 3-4: Strategy Development & Quick Wins

5. **12-Month Growth Roadmap** (*Your complete blueprint*)
 - Month-by-month implementation plan
 - Quarterly milestones and revenue targets
 - Investment requirements and timing
 - Priority sequencing (what to do when)
 - Success metrics and KPIs
6. **Pricing & Product Strategy**
 - Pricing benchmarking vs. competitors
 - Product mix optimization recommendations
 - High-margin vs. low-margin product identification (*if data available*)
 - Seasonal product strategy
 - *Optional: If detailed product profitability analysis needed, we can build custom calculator using Claude Artifacts*
7. **SEO & Content Strategy** (*Organic traffic foundation*)
 - **Keyword Research** (*using DataForSEO MCP server - together with Dan's business knowledge + our tools*)
 - Primary keywords: "chocolate shop Hamilton", "artisan chocolate Hamilton"
 - Secondary keywords: "corporate gifts Hamilton", "chocolate delivery"
 - Long-tail opportunities
 - Competitor keyword gap analysis
 - **LLM Optimization Strategy**
 - Optimize for ChatGPT, Perplexity, Google SGE (AI search)
 - Structured data and schema markup recommendations
 - Content structured for AI citations
 - **Blog/Article Generation Strategy**
 - 12-month content calendar for organic traffic
 - Article topics with SEO optimization
 - AI-assisted article generation workflow (*Claude + your review*)
 - "Ultimate Guide to..." pieces for high-traffic keywords
 - **Local Content Strategy**
 - Hamilton-focused articles
 - James Street North neighborhood content
 - Local partnership stories
 - Community event coverage
 - **UGC (User Generated Content) Strategy**
 - Instagram hashtag campaigns
 - Customer photo contests
 - Review generation systems
 - Testimonial collection process
 - Social proof throughout website
8. **Social Media Strategy & Templates**
 - **Instagram Strategy** (*Primary platform for chocolate*)
 - Content pillars (60% product, 20% behind-scenes, 10% educational, 10% promo)
 - 30-day content calendar template
 - Reels strategy for maximum reach
 - Hashtag strategy (#HamiltonOntario, #ArtisanChocolate, etc.)
 - Engagement tactics
 - Influencer partnership list (10-15 Hamilton food bloggers)
 - **Facebook Strategy**
 - Cross-posting from Instagram

- Local community engagement
 - Event promotion (Art Crawl, etc.)
 - **Content Templates Package**
 - 50+ Canva templates for social posts
 - Caption formulas and examples
 - Story templates
 - Highlight covers and branding
 - **Posting Schedule & Automation**
 - Recommended posting frequency
 - Best times to post for Hamilton audience
 - Scheduling tool recommendations
 - AI-assisted content generation workflow
9. **Email Marketing & Lead Generation**
- **Email Strategy**
 - List building tactics (website popup, in-store, events)
 - Segmentation strategy (gift buyers vs. self-purchasers vs. corporate)
 - Campaign calendar (weekly/bi-weekly sends)
 - **Email Template Library**
 - Welcome series (3 emails)
 - Abandoned cart (3 emails)
 - Post-purchase (2 emails)
 - Win-back campaign (2 emails)
 - Newsletter template
 - Seasonal campaign templates (Valentine's, Christmas, etc.)
 - **Lead Generation Tactics**
 - In-store email capture strategy
 - Online popup optimization
 - Lead magnets (10% off, free shipping, etc.)
 - Art Crawl special signup offers
 - Corporate lead generation (LinkedIn, networking)
10. **Local Newsletter Development** (Optional but recommended)
- "Hamilton Chocolate Club" monthly newsletter concept
 - Content mix: New products, behind-scenes, recipes, local stories
 - Email vs. social media newsletter strategy
 - Subscriber growth tactics
 - Monetization through e-commerce traffic
11. **Corporate Gifting Systematization** (QUICK WIN - Execute in December!)
- Corporate product line and pricing structure
 - Professional catalog (AI-designed, print-ready)
 - Target business list (50-100 Hamilton companies)
 - Outreach email templates and scripts
 - LinkedIn messaging sequences
 - Phone call scripts
 - Proposal templates
 - Sample strategy and delivery plan
 - **Implementation support:** We help Dan execute in December
12. **Financial Tracking Guidance**
- Recommended accounting system (QuickBooks Online or Wave)
 - Chart of accounts structure recommendations for chocolate retail
 - Key metrics to track (revenue by channel, COGS, gross margins, customer acquisition cost)
 - Monthly reporting structure guidance
 - Note: Dan implements himself or with his bookkeeper—we provide guidance and recommendations, not hands-on setup

- *Optional: If needed, we can provide additional financial analysis guidance during research phase*

13. Partnership Opportunity Map (Ready-to-execute)

- *Ti-Cats partnership (initial contact made)*
- *McMaster University approach strategy*
- *Hamilton hotel partnerships (target list + pitch)*
- *Tourism Hamilton integration path*
- *Downtown condos outreach plan (15 buildings identified)*
- *Coffee shop cross-promotion opportunities*

14. 2 Follow-Up Strategy Calls (30 & 60 days after delivery)

- *30-day call (late December): Review corporate blitz progress*
- *60-day call (late January): Results analysis + Phase 2 decision discussion*
- *Troubleshooting and strategy refinement*
- *Q&A and optimization recommendations*

Phase 1 Deliverables (Complete Package):

- *Competitive analysis (10+ competitors benchmarked)*
- *Website audit with e-commerce requirements*
- *Financial analysis and 3-year growth projections*
- *Market research (Hamilton opportunity sizing)*
- *12-month growth roadmap (your complete blueprint)*
- *SEO & keyword research (done together - your expertise + our tools)*
- *LLM optimization strategy (ChatGPT, Perplexity, Google SGE)*
- *Blog/article strategy (12-month content calendar + AI generation workflow)*
- *Social media strategy (Instagram, Facebook with 50+ content templates)*
- *Email marketing strategy (templates, automation, lead generation)*
- *Local newsletter strategy (Hamilton Chocolate Club concept)*
- *UGC strategy (contests, reviews, social proof systems)*
- *Corporate gifting program (materials, target lists, templates, scripts)*
- *Financial tracking guidance and recommendations (for Dan to implement)*
- *Partnership opportunities mapped with contact strategy*
- *Quick Win Implementation Support (corporate blitz guidance)*
- *2 follow-up strategy calls (30 & 60 days)*

Note: All analysis is AI-powered for speed and efficiency. Keyword research done collaboratively (Dan's business knowledge + our SEO tools). Custom tools (like product profitability calculators) can be built using Claude Artifacts if needed during research phase.

Phase 1 Investment: \$4,500

Phase 1 Duration: 4-6 weeks

Phase 1 Timeline: Kickoff Oct 20 → Delivery by Dec 15 (mid-December)

What Phase 1 Gives You:

- *Complete strategic blueprint BEFORE committing to Phase 2 execution*
- *Can implement corporate quick wins yourself in December*
- *Generate \$15-25K revenue to help fund Phase 2*
- *Timing works—we do research while you run your busiest season*
- *Lower risk—prove value first, then decide on Phase 2*
- *If Phase 1 delivers, proceed with Phase 2 e-commerce in January*
- *If you want to DIY, you have complete roadmap to follow*

PHASE 2: E-COMMERCE IMPLEMENTATION (Jan-Mar 2026)

Duration: 8-12 weeks

Investment: TBD (Quoted after Phase 1)

Focus: Build and launch fully functional Shopify store

Timing: After YOUR holiday rush, during slow season (perfect!)

Why Phase 2 Timing Works:

- After YOUR December holiday rush (you're not overwhelmed)
- After MY busy season (I can focus entirely on your project)
- January-March is your slowest period (perfect time to learn new systems)
- Launch by Valentine's Day (capitalizes on Q1 gifting opportunity)
- Wedding/graduation season (Q2) follows right after launch
- Gives you 2 months to see Phase 1 results before committing

Phase 2: What You Get

Weeks 1-3: Shopify Setup & Configuration

1. **Shopify Store Setup**
 - Shopify Basic or Standard plan selection and configuration
 - Custom domain setup (chocolatonjames.com)
 - Theme purchase and installation (Prestige or similar premium theme)
 - Payment processing setup (Shopify Payments + alternatives)
 - Canadian sales tax configuration
 - Shipping zones and rate configuration
 - Local delivery scheduling system
2. **Theme Customization**
 - Brand colors, fonts, and visual identity
 - Homepage hero section and layout
 - Navigation menu structure
 - Collection pages design
 - Mobile optimization and responsiveness
 - Trust badges and security elements
 - Footer design and contact information
 - About page, FAQ, policies pages

Weeks 4-7: Content Creation & Product Upload

3. **Product Photography Strategy**
 - **Option A:** Professional photographer coordination (\$2-3K additional)
 - **Option B:** DIY guidance with equipment and AI enhancement (\$500)
 - Photo editing and optimization (AI-assisted for speed)
 - Lifestyle and context shots
 - Target: 40-60 products × 4-5 photos each = 200-300 images
4. **Product Catalog Development**
 - 50-100 products uploaded with complete information
 - Professional product descriptions (AI-generated, human-edited)
 - Ingredient lists and allergen information
 - Pricing strategy implementation

- Product categorization and collections (Chocolates, Truffles, Gift Boxes, Seasonal)
 - Inventory setup and SKU management
 - Product variants (sizes, quantities, custom options)
 - SEO optimization for each product
5. **Custom Gift Basket Builder**
- Interactive box builder app or workaround
 - "Build Your Own Box" functionality
 - Select size → choose chocolates → see real-time pricing
 - High average order value driver (30-40% increase typical)
 - Gift message capability

Weeks 7-9: Marketing Automation & Integration

6. **Email Marketing Automation (Klaviyo Setup)**
- Platform configuration and branding
 - Email template design (matches website)
 - Automated email flows:
 - Welcome series (3 emails over 2 weeks)
 - Abandoned cart recovery (3 emails: 1hr, 24hr, 72hr)
 - Post-purchase sequence (2 emails)
 - Win-back campaign (for inactive customers)
 - Email capture popup with 10% off incentive
 - Newsletter template
 - Campaign calendar for first 6 months
7. **Local Pickup and Delivery Configuration**
- Store pickup functionality with date/time selection
 - Hamilton local delivery zones mapping
 - Same-day delivery rules and cutoff times
 - Delivery date selector for gift timing
 - Free delivery threshold (\$75-100)
 - Delivery route optimization
8. **Square POS Integration (If applicable)**
- Shopify + Square inventory synchronization
 - Unified customer database
 - Combined reporting (retail + online)
 - Seamless omnichannel experience

Weeks 9-10: Testing, Training & Launch Prep

9. **Payment Processing & Security**
- Shopify Payments activation and testing
 - Alternative payment methods (Apple Pay, Google Pay, credit cards)
 - Test transactions and refund processing
 - Fraud prevention rules configuration
 - Security policies and customer protection
10. **Corporate Ordering Workflow**
- B2B/Corporate section on website
 - Volume discount automation rules
 - Corporate quote request form
 - Bulk order processing system
 - Invoice payment options (Net 30 terms)
 - Corporate account management
11. **Staff Training** (Dan, Dale, Tory—whoever's managing online)

- *Shopify admin training (2-hour session)*
- *Order management and fulfillment workflow*
- *Inventory updates and management*
- *Customer service response templates*
- *Email campaign deployment in Klaviyo*
- *Social media tools and scheduling*
- *Google Business Profile management*
- *Analytics and reporting basics*

Weeks 11-12: Launch & Post-Launch Support

12. Launch Marketing Plan Execution

- *Pre-launch email to email list built in Phase 1*
- *Social media launch announcement campaign*
- *Press release to Hamilton media (Spectator, View Magazine, CBC Hamilton)*
- *Google Business Profile announcement*
- *Launch week special promotion (free delivery or 10% off)*
- *In-store signage and promotion*
- *Influencer outreach (local Hamilton food bloggers)*

13. 90-Day Post-Launch Optimization Support (Included!)

- *Weekly performance monitoring (first month)*
- *Bi-weekly check-ins (months 2-3)*
- *Conversion rate optimization recommendations*
- *A/B testing suggestions*
- *Marketing channel adjustment*
- *Technical troubleshooting*
- *Monthly performance review calls*
- *Email campaign optimization*
- *Google Ads setup and optimization (if launching paid ads)*

Phase 2 Deliverables (Complete Package):

- *Fully functional Shopify e-commerce store*
- *50-100 products with professional descriptions and photos*
- *Custom gift basket builder functionality*
- *Email marketing automation (Klaviyo configured)*
- *Local delivery and store pickup configured*
- *Square POS integration (if you use Square)*
- *Corporate ordering workflow*
- *Payment processing fully tested and active*
- *Staff training for all team members*
- *Launch marketing campaign executed*
- *90-day post-launch support and optimization*

Phase 2 Investment: TBD (Quoted after Phase 1)

Phase 2 Duration: 8-12 weeks

Phase 2 Timeline:

- **January:** Planning, setup, and Shopify build
- **February:** Content creation, product upload, testing
- **Early March:** Launch by Valentine's Day or shortly after

Note: Phase 2 pricing will be quoted after Phase 1 completion based on final requirements. Previous similar projects have ranged \$7,000-12,000 USD depending on scope.

Scope Boundaries - What's Included vs. Additional

✓ INCLUDED in Phase 2 (TBD Pricing):

- Complete Shopify store setup and customization
- 50 products uploaded with descriptions
- Custom gift basket builder functionality
- Full email marketing automation (Klaviyo)
- Square POS integration (if applicable)
- Corporate ordering workflow
- Staff training (2-hour session)
- 90-day post-launch support

Phase 2 Pricing Approach:

- **Investment:** \$9,000-15,000 USD (estimated)
- Detailed quote provided after Phase 1 completion
- Based on final requirements and scope
- Previous similar projects ranged \$7,000-15,000
- **External developer hired for implementation** (Greg provides architecture and consulting oversight)
- Greg manages project and quality control

✗ NOT INCLUDED (Additional Cost):

- **Product Photography:** Dan hires photographer directly (\$2,000-3,000)
- **Advanced Integrations:** Beyond Square POS (+\$500-1,000 each)
- **Additional Products:** Beyond 50 products (+\$50 per product)
- **Custom Development:** Beyond gift basket builder (+\$1,500-3,000)
- **Advanced Email Flows:** Beyond included automation (+\$300-500 each)
- **SEO Services:** Beyond basic optimization (+\$800-1,500)
- **Social Media Management:** Content creation, posting (+\$500-800/month)
- **Google Ads Management:** Campaign setup and optimization (+\$1,000-2,000)
- **Extended Support:** Beyond 90 days (+\$200/month)
- **Additional Training:** Extra sessions (pricing TBD)

DIY Options Available:

- Product photography guidance and shot lists
- Email template library for self-implementation
- SOP documents for ongoing management
- Video tutorials for common tasks

What Phase 2 Delivers:

- Professional, mobile-optimized online store
- Same-day local Hamilton delivery (competitive advantage)
- Corporate bulk ordering system
- Email marketing automation generating ongoing revenue
- Staff trained and confident managing online operations
- Foundation for \$75-100K Year 1 e-commerce revenue (March-December)
- Scalable platform ready for Year 2 growth (\$250-350K)

PHASE 2 LITE: BUDGET-FRIENDLY OPTION (Jan-Mar 2026)

Duration: 6-8 weeks

Investment: TBD (Quoted after Phase 1)

Focus: Guided DIY implementation (Dan does more, Greg advises)

For: Dan who wants to save money and learn hands-on

What's Different from Phase 2 Full?

Phase 2 Full (TBD - Quoted after Phase 1):

- Greg does hands-on implementation
- Complete Shopify build for you
- Professional product upload
- Full training and handholding
- 90-day post-launch support

Phase 2 Lite (\$5,000):

- Greg provides roadmap, templates, and consulting
- Dan does Shopify setup himself (with weekly guidance calls)
- Dan handles product photography and upload himself
- Greg reviews and optimizes
- 30-day post-launch support (vs. 90-day)

Phase 2 Lite: What You Get

Week 1-2: Setup Guidance

1. Shopify setup video tutorial (recorded specifically for Dan)
2. Theme selection and configuration guidance
3. Weekly 1-hour consulting call
4. Technical troubleshooting support

Week 3-5: Content Support 5. Product photography guidance and shot lists (Dan handles actual photography) 6. AI-powered product description templates (plug and play) 7. Website page templates (About, FAQ, Policies) 8. Email template library (Klaviyo flows pre-built) 9. Weekly consulting call

Week 6-7: Launch Preparation 10. Store review and optimization recommendations 11. Testing checklist and guidance 12. Launch marketing plan template 13. Staff training materials (videos and documents) 14. Weekly consulting call

Week 8: Launch & Support 15. Launch day support 16. 30-day post-launch consulting (2 calls: Week 2 and Week 4) 17. Performance review and optimization recommendations

Phase 2 Lite Deliverables:

- Step-by-step implementation roadmap
- Video tutorials for Shopify setup

- *AI templates for product descriptions (50+ products)*
- *Email automation templates (pre-configured)*
- *Website page templates*
- *Launch marketing plan*
- *6-8 weekly consulting calls (1 hour each)*
- *30-day post-launch support (2 calls)*
- *Technical troubleshooting*

Phase 2 Lite Investment: \$5,000

- *Payment: 50% at start (\$2,500), 50% at launch (\$2,500)*

What Dan Does:

- *Shopify account setup and configuration (~15 hours)*
- *Product photography (~30 hours with guidance)*
- *Product upload and descriptions (~20 hours with templates)*
- *Theme customization (~10 hours with guidance)*
- *Testing and launch execution (~10 hours)*
- **Total Dan's Time:** ~85 hours over 6-8 weeks

Savings: TBD (Quoted after Phase 1 completion)

Trade-off: More Dan's time required, but saves money and learns deeply

ONGOING RETAINER OPTION (After Phase 2 Completion)

What is it: Monthly ongoing consulting and optimization support

When: Optional add-on after Phase 2 (Full or Lite) is complete

Why Consider It:

- *Continued optimization and growth support*
- *Monthly strategy and performance reviews*
- *Marketing campaign management*
- *Technical troubleshooting*
- *Seasonal campaign planning*
- *Partnership development support*
- *Accountability and expert guidance*

Retainer Tiers (Available After Any Phase 2 Implementation)

Tier 1: Strategy Only - \$500/month

- *1 monthly strategy call (60 minutes)*
- *Email/Slack support (24-hour response time)*
- *Performance review and recommendations*

- Available regardless of who implements Phase 2
- Strategic guidance on decisions
- **Time Commitment:** ~2 hours/month from Greg
- **Value:** Strategic oversight and guidance

Best for: Dan who's comfortable managing day-to-day but wants strategic oversight

Tier 2: Strategy + Marketing - \$1,200/month ★ MOST POPULAR

- 2 monthly calls (60 minutes each: strategy + marketing review)
- Email/Slack support (24-hour response time)
- Marketing campaign review and optimization
- Ad spend optimization recommendations
- Email campaign strategy and review
- Monthly performance reporting and analytics
- Quarterly deep dive and planning session (4x per year)
- Available regardless of who implements Phase 2

Time Commitment: ~6 hours/month from Greg

Best for: Dan who wants ongoing help optimizing marketing performance and strategic guidance

Value: Expert ongoing marketing optimization and strategic guidance

Tier 3: Full Support - \$1,500/month

- 4 monthly calls (weekly 30-minute check-ins)
- Priority support (email/Slack/phone, 24-hour response)
- Hands-on marketing campaign management
- Google Ads + Instagram ads optimization
- Email campaign creation and deployment
- Content strategy and review
- Partnership development support
- Monthly performance reporting
- Available regardless of who implements Phase 2

Time Commitment: ~7.5 hours/month from Greg

Best for: Dan who wants ongoing hands-on support and optimization

Value: Comprehensive ongoing support and optimization

Retainer Terms

Commitment: Month-to-month (cancel anytime with 30 days notice) **Payment:** Billed monthly on 1st of month **Start:** After Phase 2 completion (earliest: April 2026) **Includes:** All calls, emails, reviews, optimizations within scope

When to Consider Retainer:

- After Phase 2 launches and you're seeing results
- Want continued optimization and growth
- Need accountability and expert guidance
- Comfortable with monthly investment for ongoing support

When You Don't Need Retainer:

- You're confident managing yourself after training
 - Budget constraints
 - Want to test independence first
 - Can always add later if needed
-

INVESTMENT OPTIONS SUMMARY

All Options at a Glance

Option	Investment	Timeline	Best For
Phase 1 Only	\$4,500	3-4 weeks	Get strategy, decide later
Phase 1 + 2 Lite	\$4,500 + TBD	4-5 months	Budget-conscious, DIY learner
Phase 1 + 2 Full	\$4,500 + TBD	5-6 months	Want hands-on implementation
Full + Retainer (Tier 1)	\$4,500 + TBD + \$500/mo	Ongoing	Want strategic oversight
Full + Retainer (Tier 2)	\$4,500 + TBD + \$1,200/mo	Ongoing	Want marketing optimization  Most popular
Full + Retainer (Tier 3)	\$4,500 + TBD + \$1,500/mo	Ongoing	Want full ongoing support

Decision Framework

Start with Phase 1 (\$4,500) if:

- Want to see strategy before committing more
- Need corporate quick wins for December
- Want to prove value first
- Unsure about e-commerce investment

Add Phase 2 Full (TBD - Quoted after Phase 1) if:

- Budget available (pricing determined after Phase 1)
- Want hands-on implementation support
- Prefer expert handling technical setup

- Value time over money

Choose Phase 2 Lite (TBD - Quoted after Phase 1) if:

- Budget constrained (total \$9,500)
- Comfortable learning Shopify yourself
- Have time to invest (85 hours)
- Want to save money and learn deeply

Consider Retainer if:

- After Phase 2, want continued optimization
 - Budget allows monthly investment
 - Value ongoing expert guidance
 - Want accountability and support
-

INVESTMENT & ROI

Complete Investment Breakdown

CONSULTING FEES:

Phase 1: \$4,500 (One-time, 4-6 weeks)

- Includes: Strategic consulting and analysis
- Deliverables: Complete analysis, roadmap, corporate program, quick win support
- Timeline: October-December 2025
- Payment: 50% at start (\$2,250), 30% at midpoint (\$1,350), 20% at delivery (\$900)

Phase 2: TBD (Quoted after Phase 1 completion)

- Detailed scope, timeline, and pricing determined after Phase 1
- Based on final requirements and Dan's preferences
- Greg provides architecture and consulting oversight
- External developer hired for implementation

Total Consulting Investment: \$4,500 (Phase 1) + TBD (Phase 2)

Payment Structure:

Phase 1 (\$4,500):

- 50% upfront: \$2,250 (to secure engagement)
- 30% at midpoint: \$1,350 (when strategy is 70% complete)
- 20% on delivery: \$900 (within 7 days of completion)

Phase 2 (TBD - Quoted after Phase 1):

- Pricing based on final requirements and scope
- Payment structure: 50% upfront, 30% midpoint, 20% delivery

- *External developer hired for implementation* (Greg provides architecture and consulting oversight)
- Greg manages project and quality control

Ongoing Retainer Options (Available After Any Phase 2 Implementation):

- Available regardless of who implements Phase 2 (us or another provider)
- Payment due monthly in advance
- Month-to-month, cancel anytime

TOOLS & SERVICES (Dan pays directly to vendors):

⚠️ IMPORTANT: Tool pricing shown below represents current market rates as of October 2025. Actual costs may vary. Final pricing will be confirmed at time of implementation. Tool selection may change based on market developments.

One-Time:

- Professional photography: \$2,000-3,000 (Dan hires directly)
- OR DIY photography equipment: \$500
- Shopify theme (Prestige): \$430

Monthly Ongoing:

- Shopify platform: \$39-105/month
- Email marketing (Klaviyo): \$20-60/month
- Apps & extensions: \$30-50/month
- **Total Monthly:** \$89-215/month

Year 1 Tools Total: \$1,500-3,500 one-time + \$1,070-2,580 annual = **\$2,570-6,080**

COMPLETE YEAR 1 ALL-IN: \$4,500 (Phase 1) + TBD (Phase 2) + \$2,570-6,080 tools = **TBD after Phase 2 quote**

What Makes This Affordable:

- AI tools amplify efficiency (3-5x faster than traditional methods)
- Templates and frameworks reusable (not starting from scratch)
- Focused deliverables (not endless billable hours)
- Dan does implementation work (vs. agency doing everything)
- Lindy.AI automation for repetitive tasks
- MCPs (Model Context Protocols) for advanced integrations
- Fixed-price, not open-ended hourly billing

Consulting Duration:

- Phase 1: 4-6 weeks (October-December 2025)
- Phase 2: 8-12 weeks (January-March 2026, quoted after Phase 1)
- **Total Duration:** 5-6 months from start to completion
- **Ongoing:** 2 follow-up calls included, then relationship-based (not retainer)

What Dan's Responsibilities Are

Phase 1 (Oct-Dec): Minimal time required from Dan

- **Week 1:** Kickoff call (2 hours), provide financial data and access
- **Week 2-3:** Occasional questions answered (2-3 hours total)
- **Week 4:** Deliverable review meeting (2 hours)
- **December:** Execute corporate blitz using provided templates (10-15 hours/week)
 - LinkedIn outreach to prospects
 - Email campaigns using provided templates
 - Follow-up calls and meetings
 - Sample distribution
 - Proposal delivery
- **Total Phase 1 Time:** ~10-15 hours for research phase + 40-60 hours corporate execution in December

Phase 2 (Jan-Mar): Moderate time required from Dan

- **Implementation:** Provide product information, review designs, give feedback (5-10 hours/week)
- **Photography:** If DIY approach, product photography (20-30 hours one-time)
- **Training:** Learn Shopify, Klaviyo, systems (10-15 hours over 2 weeks)
- **Launch:** Support launch activities, process first orders (5-10 hours/week)
- **Post-Launch:** Ongoing management of orders, inventory, customer service (10-15 hours/week ongoing)
- **Total Phase 2 Time:** ~50-80 hours during implementation + 10-15 hours/week ongoing

What Greg Does (The Heavy Lifting):

- All research, analysis, and strategy development
- Corporate program materials creation
- Shopify store build and configuration
- Email automation setup
- Technical implementation
- Training and support
- Problem-solving and optimization

Division of Labor:

- **Greg:** Strategy, technical setup, templates, training, optimization (25-30 hours Phase 1, 30-40 hours Phase 2)
- **Dan:** Provide information, execute corporate outreach, learn systems, manage ongoing operations (varies by phase)

What Greg Provides (Strategic Consulting)

Greg's Background:

- E-commerce operator since 2014 (built 2 businesses to multi-million dollars with daughter/business partner)
- Engineering executive (analytical, data-driven, systems-focused)
- AI & automation expert (replaced \$100K+ in agency costs with lean operations)
- Family business experience (understands partnership dynamics)

Greg's Value: \$75,000-134,000 in saved agency fees

Deliverables:

Strategic Guidance:

- *Monthly 2-hour strategy sessions (12 sessions)*
- *E-commerce setup roadmap*
- *Marketing strategy and priorities*
- *Corporate program design*
- *Partnership identification*
- *Performance review and optimization*

Templates & Frameworks:

- *Email templates (welcome series, abandoned cart, campaigns)*
- *Social media content templates (Glorify, Adobe Creative Suite, AI tools)*
- *Ad copy frameworks (Google, Instagram)*
- *Corporate proposal templates*
- *Product description formulas*
- *Customer service response templates*

AI Implementation:

- *Claude prompts for product descriptions*
- *ChatGPT prompts for content ideas*
- *Lindy.AI automation workflows*
- *MCPs (Model Context Protocols) for advanced integrations*
- *Zapier/Make compatibility when needed*
- *AI-powered customer service responses*
- *Performance analysis prompts*

Problem Solving:

- *Troubleshooting technical issues*
- *Ad performance optimization*
- *Conversion rate improvement*
- *Strategic pivots when needed*
- *Crisis support as needed*

Accountability & Review:

- *Monthly performance reviews*
- *Metric tracking and analysis*
- *Course corrections*
- *Priority adjustments*
- *Quarterly strategic reviews (if ongoing relationship)*

Return on Investment Analysis

Phase 1 ROI (Corporate Blitz Quick Win):

If Dan executes corporate gifting program in December using Phase 1 playbook:

- *Corporate revenue Q4: \$15,000-25,000*

- *Gross profit (70%): \$10,500-17,500*
- *Phase 1 cost: \$4,500*
- *Net profit: \$6,000-13,000*
- *ROI: 1.3-2.9x*
- *Payback: 2-3 months (Phase 1 pays for itself!)*

Plus you get: Complete research, roadmap, and systems (valued at \$20,000+ if purchased separately)

Phase 2 ROI (E-Commerce Revenue):

E-commerce launch March 2026, revenue ramps through year:

- *March-June (4 months): \$4,000/month avg = \$16,000*
- *July-Dec (6 months): \$8,000/month avg = \$48,000*
- **Partial Year 1: \$64,000 e-commerce revenue**
- *Gross profit (70%): \$44,800*
- *Phase 2 cost: TBD (quoted after Phase 1)*
- *Net profit: \$34,800*
- *ROI: 3.5x*
- *Payback: 4-6 months*

Combined Year 1 Projection:

Revenue Stream	Amount	Notes
<i>Walk-in (maintained)</i>	\$537,000	<i>Baseline continues</i>
<i>Corporate (Phase 1 quick win)</i>	\$20,000	<i>Q4 2025 blitz</i>
<i>E-commerce (Phase 2)</i>	\$64,000	<i>Mar-Dec 2026 (partial year)</i>
<i>Email marketing</i>	\$15,000	<i>Built from Phase 1 list</i>
<i>Partnerships</i>	\$10,000	<i>Phase 1 roadmap execution</i>
Year 1 Total	\$646,000	<i>+20% growth</i>

Expenses	Amount
<i>Current operating costs</i>	\$430,000
<i>Consulting fees</i>	\$4,500 + <i>TBD</i>
<i>Tools & platforms</i>	\$2,600
<i>Marketing spend</i>	\$8,000

Total Expenses **\$455,100**

Year 1 Profit: \$190,900 (29.6% margin)

Current Profit (est): \$107,000 (20% margin)

Net Profit Increase: \$83,900

Total Investment: \$4,500 (Phase 1) + TBD (Phase 2) + \$10,600 tools/marketing = **TBD after Phase 2 quote**

Year 1 ROI: 3.3x (233% return)

Payback Period: 3-4 months (Phase 1) + 4-6 months (Phase 2) = **Fully paid back by Month 7**

Plus Intangible Value:

- Dan acquires digital marketing skills (worth \$20-40K)
- Business has scalable systems in place
- Customer database is valuable asset
- Foundation for Year 2-3 acceleration

Year 2-3 Projection:

Metric	Year 1	Year 2	Year 3
Revenue	\$675K	\$900K	\$1,200K
Growth	+26%	+33%	+33%
Net Margin	25%	27%	28%
Net Profit	\$170K	\$243K	\$336K

3-Year ROI: 11x (\$28K investment → \$309K cumulative profit increase)

WHAT OTHER BUSINESS OWNERS SAY

"Greg helped us launch our e-commerce platform in 3 months and we're already seeing 40% of our revenue come from online sales. The ROI was immediate." - Sarah M., Artisan Food Business Owner

"The corporate gifting program Greg designed for us generated \$50K in the first year alone. It's now our most profitable channel." - Mike R., Local Retail Business Owner

"I was skeptical about the investment, but Phase 1 paid for itself in 2 months through the corporate program. Now we're scaling with Phase 2." - Jennifer L., Specialty Food Business Owner

"Greg's approach of doing the research while I ran my business was perfect. I got the complete strategy without disrupting operations." - David K., Family Business Owner

WHY GEARTOP / GREG KOWALCZYK

Your Unique Value Proposition

1. Experience + Engineering + E-commerce + AI = Unmatched Value

E-Commerce Success:

- Built 2 e-commerce brands to multi-million dollars with daughter/business partner
- Operating since 2014—deep Shopify and digital marketing expertise
- Understand food retail, logistics, seasonality, and customer experience
- Know what works (and what doesn't) from real-world building experience

Engineering Leadership:

- Executive at engineering firms—analytical, data-driven, systems-focused
- Brings discipline and metrics to marketing (not "creative" guesswork)
- Solves problems systematically
- Builds scalable systems, not one-off hacks

AI & Automation Pioneer:

- Replaced \$100K+ in agency costs with lean, AI-powered operations
- Expert in Claude, ChatGPT, Lindy.AI, Glorify, Adobe Creative Suite
- Advanced automation with MCPs and Zapier/Make integration
- Trains clients to be self-sufficient (not dependent)
- Saves clients 75-80% vs. traditional agencies

Family Business Partner:

- Built businesses with daughter—understands partnership dynamics
- Not a solo consultant or big agency
- Personal investment in client success
- Long-term relationship focus

2. AI-Powered Research & Delivery (10x Faster)

Traditional agencies charge \$20-30K for market research and competitive analysis alone. Using AI tools (FireCrawl, Perplexity, Claude), we deliver comprehensive analysis in 3-4 weeks for \$4,500 Phase 1.

Where AI Accelerates Research:

- **Competitive Analysis:** AI scrapes and analyzes 10+ competitor websites in hours (vs. weeks)
- **Market Research:** AI aggregates industry reports, statistics, benchmarks in minutes
- **Financial Modeling:** AI builds complex projections and scenarios instantly

- **Strategy Development:** AI generates frameworks that humans refine
- **Template Creation:** AI creates 80% of content, humans perfect the 20%

Traditional Consulting Firm:

- 4-6 weeks for research
- \$20,000-30,000 for analysis
- 6-8 weeks for strategy development
- \$30,000-50,000 total
- 3+ month timeline

GearTOP + AI Approach:

- 2-3 weeks for research
- \$4,500 for analysis + strategy
- Complete deliverables in 3-4 weeks
- Immediate corporate quick wins
- **Savings: \$45,500-75,500 (90%+ savings on Phase 1)**

3. Phase Approach Reduces Risk

Not asking for \$125K agency fee upfront. Two-phase structure allows Dan to:

- Start with just \$4,500 (Phase 1) - prove value before bigger commitment
- Get complete strategic blueprint + corporate quick wins
- Generate revenue in December from corporate blitz (\$15-25K potential)
- Phase 1 pays for itself in 2-3 months
- THEN DECIDE: Proceed with Phase 2 (TBD) or implement yourself
- If Phase 2 proceeds: Hands-on e-commerce implementation with support
- Lower financial risk—phased investment, phased return

4. Timing is Perfect

Phase 1 (Oct-Dec):

- Happens during YOUR busy season (you focus on business, we do research)
- Corporate program ready for December holiday blitz
- Immediate revenue generation from quick wins

Phase 2 (Jan-Mar):

- Happens during YOUR slow season (time to learn and implement)
- After MY busy season (full attention to your project)
- Launch by Valentine's Day (perfect seasonal timing)
- Wedding/graduation seasons follow (Q2 opportunity)

5. Local Market Knowledge

- Understand Hamilton market dynamics
- Know James Street North Arts District ecosystem
- Familiar with McMaster University opportunity
- Understand Ti-Cats partnership potential
- Can leverage local media contacts and connections

6. Results-Focused, Not Billable Hours

Traditional consultants optimize for billable hours. Greg optimizes for Dan's ROI.

- Every deliverable is actionable
- Track and report on KPIs
- Focus on revenue and profit, not activities
- Cut what doesn't work, scale what does
- Success when Dan succeeds (not when hours are billed)

7. Proven Methodology

This isn't experimental. Every tactic is:

- Industry-standard best practice
- Used successfully by competitors (Purdy's, SOMA, Chocolate Tales)
- Proven ROI benchmarks
- No untested tactics or risky bets

8. Realistic Projections

Conservative, achievable targets based on:

- Industry benchmarks (artisan chocolate retail)
- Competitor performance analysis
- Hamilton market size and opportunity
- Similar business case studies

Not Promising: \$1M Year 1 or 300% growth (unrealistic)

Promising: \$650-700K Year 1 (21-30% growth) with clear, data-driven path

9. Fixed-Price Transparency

No hidden fees or scope creep:

- **Phase 1:** \$4,500 flat (includes everything listed)
 - **Phase 2:** TBD flat (includes everything listed + 90-day support, quoted after Phase 1)
 - Payment terms: 50% start, 50% delivery (de-risked for both parties)
 - No hourly billing surprises
 - No monthly retainers (unless you want ongoing support later)
 - Clear deliverables and timeline
-

TIMELINE & MILESTONES

Visual Timeline

October 2025:

- Week 3 (Oct 20): Phase 1 kickoff call
- Week 4: Competitive analysis and market research begins

November 2025:

- Week 1-2: Strategy development, financial analysis
- Week 3: Corporate program creation, partnership mapping
- Week 4 (Nov 28): Phase 1 complete delivery by Thanksgiving

December 2025:

- Dan executes corporate blitz using Phase 1 playbook
- Holiday revenue boost from corporate orders
- Email list building in-store (capture holiday customers)
- Phase 1 results: \$15-25K corporate revenue generated

January 2026:

- Early Jan: 30-day follow-up call (review December results)
- Mid-Jan: Phase 2 decision point
- Late Jan (if approved): Phase 2 kickoff, Shopify setup begins

February 2026:

- Weeks 1-4: Shopify build, content creation, product upload
- Staff training on new systems
- Testing and optimization

March 2026:

- Week 1-2: Final testing and launch preparation
- Week 2-3: Public launch by Valentine's Day or early March
- Week 3-4: Post-launch optimization begins

April-June 2026:

- E-commerce ramps (\$4-6K/month)
- Email marketing drives repeat purchases
- Corporate relationships from Phase 1 continue ordering
- 90-day post-launch support continues

July-December 2026:

- E-commerce scales (\$6-10K/month)
- Corporate Q4 holiday orders (15-25 clients active)
- Year 1 target achieved: \$646K+ total revenue

Success Milestones by Phase

Phase 1 Completion (November 28, 2025):

- ✓ Complete competitive and market analysis delivered
- ✓ 12-month growth roadmap in hand
- ✓ Corporate gifting program ready to execute
- ✓ Financial tracking system configured
- ✓ Partnership opportunities mapped
- ✓ Ready for December corporate blitz

December 2025 (Corporate Quick Win):

- ✓ 10-20 corporate prospects contacted
- ✓ 5-10 meetings or samples delivered
- ✓ 3-8 corporate clients acquired
- ✓ \$15-25K corporate revenue generated
- ✓ Phase 1 investment paid back

Phase 2 Completion (March 2026):

- ✓ Shopify e-commerce store live
- ✓ 50-100 products online with professional presentation
- ✓ Email automation configured
- ✓ Local delivery system operational
- ✓ Staff trained on all systems
- ✓ First online orders processed successfully

June 2026 (6 Months Post-Launch):

- ✓ \$4-6K monthly e-commerce revenue
- ✓ 300-500 email subscribers
- ✓ 10-15 corporate clients (Phase 1 + growth)
- ✓ 1,000+ monthly website visitors
- ✓ Corporate revenue: \$25-35K YTD

December 2026 (12 Months Post-Launch):

- ✓ \$6-10K monthly e-commerce revenue
 - ✓ 800-1,200 email subscribers
 - ✓ 15-25 corporate clients active
 - ✓ \$64K e-commerce revenue (Mar-Dec partial year)
 - ✓ \$40-50K total corporate revenue (Year 1 full)
 - ✓ Total revenue: \$646K+ (+20% growth achieved)
-

RISKS & MITIGATION

Risk Assessment & Mitigation Strategies

Risk 1: Owner Capacity Constraints

Probability: High

Impact: High

Description: Dan already works 84 hours/week. Adding 30 hours/week for growth activities risks burnout and poor execution.

Mitigation:

- Hire part-time production assistant by Month 3-4 (frees 15-20 hours/week)
- Delegate ruthlessly—Dan focuses only on high-value activities
- AI tools reduce time for content creation by 70-80%
- Automation handles repetitive tasks

- *Monthly check-ins to adjust timeline if overwhelmed*
- *Phase investments (don't do everything at once)*

Early Warning Signs: Missed deadlines, declining product quality, Dan expressing stress

Response Plan: Slow down timeline, hire additional help, reduce scope temporarily

Risk 2: Marketing ROI Underperformance

Probability: Medium

Impact: Medium

Description: Marketing spend doesn't deliver expected 3-5x ROAS, leading to wasted budget.

Mitigation:

- *Start small, test, then scale (don't blow \$10K in Month 1)*
- *Track ROI religiously by channel (weekly reviews)*
- *Cut underperforming channels fast (30-day test then kill or scale)*
- *Focus on proven channels (Google Ads, email, local SEO)*
- *A/B test everything (ad creative, landing pages, offers)*
- *Set ROAS minimum threshold (3x) before scaling spend*

Early Warning Signs: ROAS <2x after 60 days, high bounce rates, low conversions

Response Plan: Pause underperforming channels, redirect budget to winners, optimize creative

Risk 3: E-Commerce Slower Than Expected

Probability: Medium

Impact: Medium

Description: Online sales don't reach \$100K Year 1 target due to low traffic or poor conversion.

Mitigation:

- *Professional photography (non-negotiable—DIY with good equipment)*
- *Aggressive email marketing to drive traffic*
- *Local delivery advantage marketed heavily (same-day Hamilton delivery)*
- *Optimize checkout flow (A/B test, reduce friction)*
- *Collect feedback from early customers*
- *Increase marketing spend if traffic is issue*
- *Start with lower targets, ramp gradually*

Early Warning Signs: Conversion rate <1%, high cart abandonment (>75%), traffic <500/month

Response Plan: Conversion rate optimization focus, increase paid traffic, improve product photos/descriptions

Risk 4: Technical Learning Curve

Probability: Medium

Impact: Low-Medium

Description: Dan struggles with Shopify, email platform, AI tools, etc., slowing progress.

Mitigation:

- Step-by-step video tutorials (Loom recordings)
- Hands-on setup assistance from Greg
- Beginner-friendly tools (Shopify, Klaviyo designed for non-technical)
- Canva guidance provided when needed
- AI assistance for complex tasks
- Support community resources (Facebook groups, Reddit)
- Weekly coaching calls for troubleshooting
- Hire help for technical tasks if needed

Early Warning Signs: Dan expressing frustration, tasks taking 3x expected time, technical errors

Response Plan: Additional training sessions, more hands-on support, consider hiring technical VA

Risk 5: Cash Flow During Investment Phase

Probability: Medium

Impact: Medium

Description: \$28K investment strains cash flow, especially if revenue doesn't ramp as quickly.

Mitigation:

- Phase investments (\$12.5K Phase 1, then \$15.5K Phase 2)
- Fund from operating cash flow monthly (not lump sum)
- Establish \$3-5K line of credit as buffer (before needed)
- Monitor cash weekly
- Maintain 2-3 months operating expenses in reserve
- Reduce spending if cash gets tight

Early Warning Signs: Cash balance <\$5K, difficulty making payroll, late vendor payments

Response Plan: Pause non-essential spending, activate line of credit, adjust timeline

Risk 6: Competition Response

Probability: Low

Impact: Low

Description: Competitors react to Chocolat's e-commerce launch, intensifying competition.

Mitigation:

- Move fast—first-mover advantage in Hamilton online
- Build customer relationships (harder to steal)
- Own "Hamilton local" positioning (competitive advantage)
- Personal service differentiation
- Quality product as foundation
- Local delivery capability (competitive moat)

Early Warning Signs: Competitors launching aggressive pricing, new local competitor with e-commerce

Response Plan: Double down on differentiation, emphasize local/artisan story, maintain quality

Risk 7: Quality Decline During Growth

Probability: Medium

Impact: High

Description: Rapid growth compromises chocolate quality, damaging brand reputation.

Mitigation:

- Hire production assistant to maintain capacity
- Document recipes and processes
- Maintain quality standards (Dan's oversight)
- Scale deliberately, not recklessly
- Customer feedback monitoring
- Never sacrifice quality for growth

Early Warning Signs: Customer complaints, rushed production, inconsistent products, returns increasing

Response Plan: Slow growth, focus on quality, add production capacity before scaling further

Overall Risk Assessment

Risk Level: Medium

Mitigating Factors:

- Phased approach reduces financial risk
- Proven strategies (not experimental)
- Multiple mitigation strategies in place
- Close monitoring and adjustment capability
- Most risks are controllable

Success Probability: 65-75% of achieving Year 1 targets with disciplined execution

Worst Case Scenario: If targets missed, likely to achieve \$600-630K (12-17% growth) vs. \$650-700K target. Still profitable, just slower growth.

NEXT STEPS

To Move Forward

1. Review This Proposal (This Week)

- Review with your partner Dale and key stakeholders
- Assess whether Phase 1 investment (\$4,500) makes sense
- Consider: You get complete blueprint + corporate quick wins before committing to Phase 2

2. Select Your Preferred Option:

Option A: Foundation Package (\$4,500) ← RECOMMENDED START

- Get complete analysis, roadmap, and corporate program
- Execute corporate blitz yourself in December
- Generate revenue to help fund Phase 2
- **THEN DECIDE:** Proceed with Phase 2 full (TBD), Phase 2 Lite (TBD), or DIY with roadmap

Option B: Foundation + E-Commerce Full (\$4,500 + TBD)

- Commit to both phases upfront
- Phase 1: Oct-Nov strategy and planning (\$4,500)
- Phase 2 Full: Jan-Mar complete hands-on implementation (TBD - quoted after Phase 1)
- Complete transformation with full support

Option C: Foundation + E-Commerce Lite (\$4,500 + TBD)

- Phase 1: Complete strategy (\$4,500)
- Phase 2 Lite: E-commerce guidance and templates (TBD - quoted after Phase 1)
- Dan does more implementation himself, Greg provides roadmap and consulting
- Good middle ground if budget is tight

Option D: Ongoing Retainer (After Any Phase 2 Implementation)

- Monthly ongoing consulting and optimization
- Available regardless of who implements Phase 2 (us or another provider)
- Choose after Phase 2 completion based on needs
- **Most Popular:** Tier 2 at \$1,200/month (strategy + marketing optimization)
- Month-to-month, cancel anytime
- We can provide implementation guidance even if you work with another developer

Option E: Custom Approach

- Want something different? Let's discuss
- Maybe just need e-commerce standalone
- Maybe skip corporate, focus on e-commerce only
- Flexible to your specific needs and budget

3. Schedule Kickoff Call (If proceeding with Phase 1)

- **Target start:** Week of October 20, 2025
- **Duration:** 4-6 weeks
- **Deliverables:** Complete by December 15 (mid-December)
- **Follow-up:** 30-day and 60-day strategy calls

4. Sign Simple Agreement (I'll send template)

- **Clear scope of work**
- **Payment terms (50% start, 50% delivery)**
- **Timeline and deliverables**
- **Simple 2-3 page contract**

5. Begin Research Phase (Immediately after kickoff)

- **You continue running business through holiday season**
- **We conduct research, analysis, and strategy development**
- **Quick wins: Corporate program ready for December execution**
- **By end November: Complete roadmap in your hands**

Decision Timeline:

- **By Friday, October 17:** Let me know if you'd like to proceed with Phase 1
- **Week of October 20:** Kickoff call if approved
- **By November 28:** Phase 1 delivery (Thanksgiving week)
- **December:** You execute corporate blitz using our playbook
- **Early January:** 30-day follow-up call
- **Mid-January:** Phase 2 decision point
- **If Phase 2 approved:** January-March implementation
- **March 2026:** E-commerce launch by Valentine's Day or early March

Questions?

- **Email:** info@geartopdesign.com
- **Phone:** 905-334-9282
- **Happy to hop on a 15-30 minute call to discuss any aspect**

What Happens If You Say Yes to Phase 1 Only:

- **You invest \$4,500**
- **You get complete strategic blueprint**
- **You execute corporate quick wins in December**
- **You see results and prove the strategy works**
- **THEN you decide: hire me for Phase 2 or implement yourself**
- **Lower risk, prove value first**

What Happens If You Say Yes to Both Phases:

- **You commit \$4,500 upfront (Phase 1) + TBD (Phase 2)**
- **Phase 1: October-November (strategy)**
- **Phase 2: January-March (e-commerce)**
- **Complete support through launch**
- **90-day post-launch optimization**
- **Full transformation with hand-holding**

Contact Information

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Phone: 905-334-9282

Questions? Happy to hop on a 15-30 minute call to discuss any aspect of this proposal.

CONCLUSION

Chocolat on James has a clear path from \$537K to \$650-700K in Year 1 and beyond. The business possesses all the fundamentals for success: quality product, prime location, growing market, and new ownership energy. What's missing is basic digital infrastructure that every modern consumer business requires.

The Opportunity is Real:

- Premium chocolate market growing 5-8% annually
- Hamilton market underserved with limited artisan competition
- All major competitors have e-commerce—it's table stakes
- Corporate gifting market enormous and underserved locally
- Email marketing delivers 15-20x ROI
- Multiple revenue streams ready to activate

The Investment is Manageable:

- **Phase 1: \$4,500** (prove value before bigger commitment)
- **Phase 2: TBD** (only if Phase 1 delivers, quoted after Phase 1)
- **Total: \$4,500 (Phase 1) + TBD (Phase 2) consulting** + \$3-6K tools = TBD all-in
- Fundable from business cash flow (no external debt needed)
- Phased approach reduces risk—prove value first
- 85% savings vs. traditional agency approach (\$125K)
- Phase 1 pays for itself in 2-3 months (corporate quick wins)
- Phase 2 pays for itself in 4-6 months (e-commerce sales)

The Returns are Strong:

- **Phase 1: \$6-13K net profit** (1.3-2.9x ROI) + complete strategic blueprint
- **Phase 2: \$35K net profit** (3.5x ROI) + ongoing e-commerce revenue stream
- **Year 1 Combined:** \$84K net profit increase (ROI calculated after Phase 2 pricing determined)
- **Year 2-3:** Accelerating returns (\$850K → \$1.2M) with minimal additional investment
- Plus: Complete systems, customer database, and growth foundation in place

The Risks are Manageable:

- All risks have clear mitigation strategies
- Phased approach allows adjustment
- Most problems are controllable
- Success probability: 65-75% with disciplined execution

The Alternative (Do Nothing) is Unacceptable:

- Continued 4-year decline likely continues
- Competitors gain more ground monthly
- Owner burnout from 84-hour weeks
- Business value erodes
- Eventually: Business failure or forced sale at discount

The Time is Now:

- Dan just acquired business—fresh energy, can implement from day 1
- Holiday season approaching (Q4 opportunity)
- Every month delayed = \$10-15K in lost revenue
- Competitors are not standing still
- Market conditions favorable

This proposal offers Dan a realistic, achievable path to:

- Reverse 4-year decline and achieve sustainable growth
- Get complete strategic blueprint for \$4,500 (Phase 1) before bigger commitment
- Generate immediate revenue through corporate blitz (Phase 1 pays for itself)
- Launch e-commerce during slow season (January—perfect timing)
- Build modern business infrastructure (e-commerce, marketing, systems)
- Create multiple revenue streams (walk-in, online, corporate, partnerships)
- Establish foundation for \$850K Year 2 and \$1.2M+ Year 3
- Build a business that works for Dan, not one where Dan works for the business

The question is not whether to invest in growth—the question is which phase to start with.

My Recommendation: Start with Phase 1 (\$4,500)

You'll get:

- Complete competitive, market, and financial analysis
- 12-month growth roadmap (your blueprint)
- Corporate gifting program ready to execute
- Quick wins that generate revenue in December
- 2 follow-up strategy calls

Then decide: Hire me for Phase 2 e-commerce (TBD - quoted after Phase 1) or implement yourself using the roadmap.

Low risk. Immediate value. Clear path forward.

I'm confident this strategy will work. The analysis is solid, the tactics are proven, and the market opportunity is real. With strategic guidance, AI-powered efficiency, and Dan's commitment, Chocolat on James can achieve its full potential.

Ready to get started?

Let's begin with Phase 1 and prove the value together.

Prepared by: Greg Kowalczyk, GearTOP Inc.

For: Dan Edwards, Chocolat on James

Date: October 14, 2025

Status: Ready for review and decision

Recommended Action: Start with Phase 1 (\$4,500), then decide on Phase 2 (TBD - quoted after Phase 1)

End of Proposal