Kickoff_Meeting_Summary_Jan5_2026

Kickoff Meeting Summary

Best Way Amazon Launch Project

Date: January 5, 2026 **Participants:** - Greg Kowalczyk (Consultant) - Todd McDaniel (Client) - Douae Lahlou (Client Team)

Executive Summary

This kickoff meeting served as an in-depth discovery conversation rather than following the structured agenda. The discussion covered team backgrounds, capabilities, and project context in detail, providing valuable foundation for the engagement. The formal project structure (including priority list establishment, workflow planning, and training schedule) will be addressed in subsequent meetings.

Key Outcome: Greg will conduct initial competitive analysis on the product list once received. A **Wednesday follow-up discussion** will review findings and establish a realistic timeline based on analysis results.

Important Note on Timeline: While the factory has indicated this week as ideal for order finalization (to achieve March 30 ship date), the actual ordering timeline depends on multiple factors including analysis results, product validation, and strategic considerations. Proper execution of this project typically requires more time than the compressed timeline initially suggested. The Wednesday meeting will clarify the optimal path forward.

Meeting Structure: Planned vs. Actual

Planned Agenda

The meeting was scheduled to cover: 1. **Introductions & Team Overview** (10 min) - Douae's skills assessment 2. **Project Review & Confirmation** (15 min) - Option C scope, 33 SKUs, deliverables 3. **Current Status Check** (10 min) - Tools, access,

blockers 4. **Establish Priority List** (15 min) - Identify 15 highest-priority SKUs 5. **Plan of Action & Next Steps** (20 min) - Workflow, training schedule, timeline 6. **Q&A & Open Discussion** (10 min)

Total Planned Time: 80 minutes

Actual Meeting Flow

The meeting evolved into an organic discovery conversation: - ✓ **Extended Introductions** (~45 minutes) - Deep dive into all participants' backgrounds, experience, and capabilities - ✓ **Technology & Tools Discussion** (~20 minutes) - AI tools, flat files, content creation capabilities - ✓ **Logistics & Operations** (~15 minutes) - Supply chain, shipping methods, 3PL arrangements - ✓ **Strategy Considerations** (~10 minutes) - Multi-channel approach, pricing, market positioning - ✗ **Formal Project Scope Review** - Not completed - ✗ **Priority List Establishment** - Deferred (list to be sent after meeting) - ✗ **Structured Action Plan** - Not formalized - ✗ **Training Schedule** - Not established

Reflection

While the meeting didn't follow the prepared agenda, the extended discovery conversation provided valuable context about: - Team capabilities and technical skills (particularly Douae's flat file experience) - Historical challenges and lessons learned - Available resources and tools - Complexity of multi-channel operations - Realistic expectations for project execution

Next Steps: The structured elements from the original agenda (priority list, workflow, training schedule, formal timeline) will be addressed after initial product analysis is complete and reviewed on Wednesday.

Background & Context

Todd McDaniel's Background

- **Retail Experience:** Former retail buyer at Canadian Tire and Target Canada across multiple categories
- **Transition to Supplier Side:** Joined partner Kurt in 2014, expanding brands and product lines
- **Recent Challenges:**
  - Moved to remote operations in 2020, gave up Oakville warehouse
  - Pressured into e-commerce by retail partners (Walmart, Canadian Tire) during pandemic
  - First venture (Constant Air inflatable bouncy castles) unprofitable after 3 years
  - High insurance liability costs due to product risk profile
- **Current Approach:** Moving away from high-cube, high-ticket, highly seasonal, high-risk products

Douae Lahlou's Background

- **Experience:** Logistics, supply chain, customer service, and e-commerce

- **International Experience:** Worked in Morocco, Paris, and Germany
- **Recent Role:** French carpet company (retail and drop shipping)
  - Managed bulk listings through Excel import files
  - Worked with Amazon, Wayfair, and other marketplaces
  - Collaborated with product, SEO, and marketing teams
- **Technical Skills:** ERPs (Odoo, ACP), Excel/CSV expertise, Jungle Scout
- **Learning Style:** Hands-on, quick learner
- **New Responsibility:** Will manage day-to-day Amazon account operations (Todd has been the bottleneck)

Greg Kowalczyk's Background

- **Professional Background:** Mechanical engineer, 20+ years managing engineering departments (up to 70 people)
- **International Experience:** Germany (3 years), China, India
- **Amazon Experience:** Full-time since 2014 (11-12 years)
  - Tape Geeks (health/recovery products)
  - GearTop (outdoor products)
- **Team Evolution:** Reduced from 11 to 5 people through optimization and AI implementation
- **Approach:** Data-driven, analytical, heavy AI integration
- **Business Model:** Private label (not arbitrage or drop shipping), some wholesaling
- **Market Split:** 80% US / 20% Canada (Canada growing)

Current Situation Analysis

Best Way Partnership

- **Partnership Duration:** 20-year relationship with Best Way factory
- **Advantages:**
  - Access to P360 company intranet with product specifications, copy, and digital assets
  - Ability to extract data in bulk spreadsheet format
  - Flexibility to modify/create new images and content
  - Existing global presence may provide review history and algorithm recognition

Existing Best Way Amazon Presence

- **Current Listings:** 2 items already listed on Amazon Canada
- **Quality Assessment:** Images competitive for Canadian Tire/Walmart standards but below Amazon optimization levels
- **Account Access:** Recently granted to Douae (within last month)
- **Management Gap:** Todd has been sole account manager, limited to 15-30 minutes daily (insufficient)

Product Selection Progress

- **Initial Screening:** 124 SKUs identified (accessories complementing competitor products)

- **Strategy Rationale:** Broad offering perception vs. limited SKU count
- **Current Filter:** Focusing on $50+ retail price points for better profitability
- **Validation Work:** Douae compiling competitive pricing data
  - Checking bricks-and-mortar customer pricing
  - Identifying similar items on Amazon
  - Capturing URLs and competitive data
- **Final Selection:** ~15 priority SKUs for initial analysis

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Key Discussion Topics

1. Product Research & Analysis Methodology

Greg's Approach: - Deep dive analysis for each item (10-20 competitors per niche) - Comprehensive data scraping: - Competitor reviews and ratings - Sales velocity - Keyword rankings - Market positioning - Competitive strength assessment - Advantage identification from existing global presence - Example: Best Way filter with 4.6 stars and 3,000+ reviews - Algorithm recognition vs. zero-review product launch - Niche correlation analysis (identifying related products that may share market space)

Tools Mentioned: - Jungle Scout (recently introduced to Douae) - Specialized scraping programs for multi-SKU analysis - Various competitive intelligence tools

2. Flat File Management

Importance: - Critical for bulk catalog management - Requires specialized expertise ("art on its own") - Can dramatically reduce time when done correctly - High risk if done incorrectly (can override entire catalog)

Douae's Experience: - Familiar with CSV/Excel bulk imports - Experience with Shopify and marketplace platforms - Detail-oriented approach required (one error copies across entire list)

Best Practices: - Amazon templates change frequently (monthly/weekly) - Requires dedicated team member staying current with changes - Greg's team has specialist handling all flat file operations

3. AI Integration & Content Creation

Current AI Landscape: - Major shift in capabilities over past 1-2 years - Now possible to create professional-grade images, videos, voiceovers, and animations - Greg's team uses AI daily for all content creation

Tools & Platforms Discussed:

Image Generation: - ChatGPT (recent 5.2 update improved image quality) - Google Gemini 3 and Nano Banana (currently near top tier) - Mid Journey (still good but others progressing) - Croma (allows model switching for different creation types) - Cost comparison: $2-3 AI credits vs. $2,000-3,000 professional photo shoot

Business Applications: - ChatGPT for thought partnership and business strategy - Co-pilot for productivity tasks - Claude (Anthropic) mentioned as strong alternative - Administrative work automation (receipt/invoice processing saving weeks of work)

Douae's Current Usage: - ChatGPT and Co-pilot - Attempted Photoshop AI for carpet placement (results not yet convincing)

Greg's Commitment: - Will demonstrate tools and workflows - Can customize prompts and automation for specific needs - Maintains one graphic designer for final 15% touchups - Creates custom solutions for different client requirements

4. Logistics & Supply Chain

Current Setup: - **3PL Partner:** Triumph Logistics (Etobicoke) - **Customs Broker:** CH Robinson - **CARM Registration:** Complete - **Shipping Method:** Historically DDP (Direct Delivery Paid) from Shanghai - **Amazon Fulfillment:** Using UPS (Amazon preferred partner) - Provides platform visibility for inbound shipping costs - Triumph has offered competitive freight rates (not yet utilized)

Shipping Options Discussion: - DDP: Factory handles all freight and duties to 3PL - FOB Shanghai: Alternative option available, requires comparison - Greg's approach: Mix of methods - More DDP recently - LCL (Less than Container Load) for Canada - Full containers for US - LA area logistics center - Niagara Falls warehouse for cross-border needs

Container Flow: - Containers delivered directly to Triumph - Goods flow to Amazon FBA intuitively (needs optimization) - Sometimes using Amazon's recommendations (not optimal) - Limited time has prevented freight rate comparison and optimization

5. Pricing & Retail Strategy

Price Point Threshold: - **Agreed Minimum:** $50+ retail for better profitability margins - **Exceptions:** May exist based on competitive analysis - **Rationale:** Higher price points reduce impact of: - Shipping costs - Picking/packing fees - Warehouse storage - Amazon fees

Market Dynamics: - Lower-priced products attract more sellers (lower barriers to entry) - Higher-priced items may have less competition - Need to balance price point with market demand

Pricing Challenges: - Best Way sold through Walmart 2P (Walmart controls retail) - Walmart pricing algorithms can conflict with Amazon - Risk of losing buy box or triggering price wars - Need to manage multi-channel pricing carefully

6. Multi-Channel Considerations

Current Channels: - Amazon Canada (primary focus) - Walmart.ca (existing 2P relationship) - Canadian Tire, Home Depot (retail partners)

Walmart Considerations: - **1P vs 3P Decision:** Marketplace listing (3P) vs. buyer-managed (2P) - **Pricing Conflict Risk:** Walmart 2P price changes affect Amazon competitiveness - **Reseller Risk:** Products on clearance can be relisted by third parties

Future E-Commerce Strategy:

Best Way Website: - Currently no shopping function (customer service only) - Managed globally from Shanghai with standard templates - Bilingual customization for Canada - **Proposed Solution:** Shopify storefront bolted to existing site - Advantage: Control over pricing and customer experience

Other Brands: - Need to determine separate Shopify stores vs. consolidated approach - Not immediate priority (focus on Amazon launch first)

Digital Marketing: - Currently manage all Best Way digital marketing in Canada - Can drive traffic to Amazon or branded website - Opportunity to leverage brand awareness

7. Product Codes & International Listings

Code Types: - **EAN:** 13-digit codes (European, also used in Canada) - **UPC:** 12-digit codes (US standard) - Best Way has both for most products

Technical Considerations: - Typically EAN = UPC with leading zero - Best Way's codes have different leading digits (non-standard) - Same product may have different codes in different markets - Amazon treats different codes as separate listings - **Implication:** Need to check both codes for existing listings - **Opportunity:** Copy existing global listing data to Canadian listing

Greg's Preference: - Uses EAN codes even in US for consistency - Easier for packaging and operations - Retailer systems may dictate requirements (US prefers UPC)

8. SEO & Future Optimization

Website SEO: - Traditional SEO optimization still important - **New Focus:** LLM Optimization (AI Optimization) - Ensures AI models can discover and understand content - OpenAI planning to enable advertising capabilities - Growing importance in 2026 and beyond

Amazon-Specific: - Keyword optimization critical for discovery - Greg scrapes competitor keyword rankings - Will provide keyword strategy based on competitive analysis

9. Listing Modification Challenges

Todd's Experience: - Submitted changes to existing listings not approved - Amazon disclaimer: "Will use judgment on whether submission improves listing" - Uncertain if rejection or technical issue

Greg's Insight: - Case-by-case evaluation by Amazon - Even brand owners with Transparency labels face rejections - Bot flagging can prevent legitimate changes - Requires understanding of Amazon's approval criteria

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Timeline & Urgency

Factory Timeline Context

- **Factory's Preferred Deadline:** This week (January 5-12, 2026) for March 30 ship date
- **Ship Date from Shanghai:** March 30, 2026 (if ordered this week)
- **Estimated Arrival at Triumph:** End of April 2026
- **Chinese New Year Impact:** Production scheduling becomes more complex after this week
- **Seasonal Consideration:** Late April arrival is late for peak spring season start

Realistic Timeline Assessment

Important Clarification: The order finalization timeline depends on multiple factors beyond factory scheduling:

Factors Requiring Consideration: 1. Product validation through competitive analysis 2. Profitability assessment for each SKU 3. Strategic fit with long-term business goals 4. Risk assessment based on data 5. Inventory investment decisions 6. Market opportunity validation

Greg's Perspective: Proper execution of product analysis and validation typically requires more time than the compressed timeline initially suggested. Rushing critical decisions to meet factory deadlines can lead to the type of costly mistakes experienced in previous launches.

Next Step: Wednesday follow-up discussion will review initial analysis findings and establish a realistic, data-driven timeline that balances: - Market opportunity and seasonality - Thorough product validation - Risk mitigation - Factory scheduling constraints

Pre-Sale Discussion

- **Douae's Suggestion:** Pre-sale to capture early demand
- **Amazon Policy:** Pre-sales not allowed on Amazon
- **Walmart 2P:** Has done pre-sales previously
- **Shopify Option:** Pre-sale capability if e-commerce site launched

Timeline Philosophy

Better to launch later with validated products than rush to meet arbitrary deadlines with unvalidated selection. The goal is sustainable profitability, not just meeting ship dates.

Action Items

Priority: Before Wednesday Meeting

Todd & Douae: - [ ] Identify as many candidate items as possible from Best Way catalog - [ ] Send complete product data to Greg including: - Product specifications - Cost information - DDP quotes (Shanghai to Triumph 3PL) - EAN and UPC codes for all items - Current competitive pricing research - URLs for similar Amazon listings - Available digital assets from P360 system - [ ] Prepare any questions about product identification, classification, and validation criteria

Greg: - [ ] Receive and review product list - [ ] Conduct initial competitive analysis on submitted SKUs - [ ] Scrape competitor data (reviews, keywords, sales, rankings) - [ ] Analyze existing global listings (using both EAN/UPC codes) - [ ] Prepare preliminary findings for Wednesday discussion - [ ] Identify key components important for product identification, classification, and validation

Wednesday Meeting Objectives

Primary Focus: - [ ] **Identify key components for product identification, classification, and validation** - What criteria determine product viability? - What data points are most critical? - What validates market opportunity?

Key Discussion Points: - [ ] Review Greg's preliminary competitive analysis findings - [ ] Assess product viability and profitability potential - [ ] Establish realistic project timeline based on data - [ ] Determine ordering strategy and timeline - [ ] Confirm scope: Which SKUs warrant deeper analysis - [ ] Plan workflow and training schedule - [ ] Address deferred agenda items from kickoff meeting: - Formal project scope confirmation (Option C) - Priority list finalization (15 high-priority SKUs) - Training schedule establishment - Communication cadence

Outcome: Clear, data-driven path forward with realistic timeline and validated product selection criteria

Post-Wednesday (Timeline TBD Based on Meeting)

Greg: - [ ] Complete detailed analysis on confirmed priority SKUs - [ ] Present comprehensive competitive landscape findings - [ ] Provide keyword strategy recommendations - [ ] Identify opportunities from existing global reviews/data - [ ] Demonstrate AI tools and workflows to team

Todd & Douae: - [ ] Review Greg's comprehensive analysis - [ ] Make final product selection decisions (data-driven) - [ ] Obtain FOB Shanghai quotes for freight comparison - [ ] Get Triumph freight quotes for cost analysis - [ ] Finalize order quantities based on validated analysis - [ ] Place factory order (timeline determined by analysis, not arbitrary deadlines)

Douae: - [ ] Continue familiarizing with Amazon Seller Central - [ ] Begin learning flat file management - [ ] Explore AI tools Greg recommends - [ ] Prepare for day-to-day account management role

Medium-Term (Before April Arrival)

Team: - [ ] Optimize product images using AI tools - [ ] Create enhanced listing content - [ ] Prepare flat files for bulk upload - [ ] Set up Triumph-to-Amazon shipping optimization - [ ] Plan inventory flow strategy - [ ] Develop pricing strategy accounting for multi-channel presence

Todd: - [ ] Determine Walmart channel strategy (2P vs. 3P marketplace) - [ ] Evaluate Shopify storefront feasibility for Best Way site - [ ] Consider insurance cost reduction opportunities as product mix changes

Long-Term (Future Considerations)

- [ ] Evaluate separate Shopify stores for other brands
- [ ] Implement LLM/AI optimization for website content
- [ ] Develop digital marketing strategy to drive traffic
- [ ] Consider expansion of wholesale relationships
- [ ] Plan for team AI training and implementation
- [ ] Explore automation opportunities for operations

Preliminary Directions Discussed

Note: Due to the discovery-focused nature of this meeting, formal decisions were not finalized. The following represent preliminary thinking that will be confirmed after analysis is complete:

1. **Price Point Consideration:** General agreement to focus on $50+ retail items (with potential exceptions based on data)
2. **Analysis Approach:** Deep dive analysis preferred over broad shallow review
3. **Account Management:** Douae positioned to take over day-to-day Amazon operations after training
4. **Analysis Method:** Greg's comprehensive competitor scraping approach will be used
5. **Content Creation:** Team interested in leveraging AI tools for optimization
6. **Initial Focus:** Amazon Canada launch as primary channel (other channels secondary)
7. **Timeline Approach:** Data-driven decisions prioritized over arbitrary factory deadlines

Formal Decisions: To be made during Wednesday meeting after reviewing preliminary analysis results

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Questions for Follow-Up

1. **Freight Optimization:** Compare DDP quotes vs. FOB + Triumph rates
2. **Walmart Strategy:** 2P continuation vs. 3P marketplace approach?
3. **Multi-Channel Pricing:** How to manage price conflicts across platforms?
4. **Shopify Timeline:** When to implement e-commerce on Best Way site?
5. **Other Brands:** Strategy for non-Best Way products in portfolio?

6. **Inventory Planning:** Optimal initial order quantities per SKU?
7. **Listing Strategy:** Use existing global listings or create new Canadian listings?

Resources & Tools Mentioned

AI Tools for Content Creation

- ChatGPT (v5.2) - Business strategy, image generation
- Co-pilot - Productivity and administrative tasks
- Claude (Anthropic) - Alternative to ChatGPT
- Google Gemini 3 & Nano Banana - Top-tier image generation
- Mid Journey - Image generation (still viable)
- Krea - Multi-model platform for various creation types

Amazon & E-Commerce Tools

- Jungle Scout - Product research and competitive analysis
- Amazon Seller Central - Account management
- Flat file templates - Bulk listing management
- P360 (Best Way) - Product data and digital assets

Logistics & Operations

- Triumph Logistics - 3PL partner (Etobicoke)
- CH Robinson - Customs brokerage
- UPS - Amazon preferred carrier
- CARM - Customs registration system

Platforms

- Amazon Canada - Primary sales channel
- Walmart.ca - Secondary channel (2P relationship)
- Shopify - Potential future e-commerce platform

Wednesday Meeting Objectives (Next Steps)

1. **Review preliminary competitive analysis findings** - Data-driven assessment of submitted SKUs
2. **Establish realistic project timeline** - Based on analysis complexity and thoroughness required
3. **Validate product selection approach** - Confirm which SKUs warrant deeper analysis
4. **Address deferred agenda items:**
   - Formal project scope confirmation (Option C from proposal)
   - Priority list finalization (15 high-priority SKUs)
   - Training schedule establishment

  - Workflow and communication cadence
5. **Determine ordering strategy** - Timeline driven by validation results, not factory pressure
6. **Plan next phase execution** - Clear action plan based on data

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Notes & Observations

Strengths & Opportunities

- Long-term factory relationship provides flexibility and trust
- Existing global product presence may accelerate Amazon launch
- Access to comprehensive product data and assets
- Team willing to embrace AI and modern tools
- Douae's technical skills align well with requirements
- Greg's data-driven approach reduces risk

Challenges & Risks

- Factory timeline pressure vs. need for thorough analysis (requires balancing)
- Late seasonal arrival if March 30 ship date targeted (end of April for spring products)
- Multi-channel pricing conflicts need management
- Previous Amazon venture was unprofitable (important learning curve to leverage)
- Limited time availability has been historical bottleneck (process improvement needed)
- Insurance costs still elevated from previous product line
- Need to avoid repeating past mistakes of rushing critical decisions

Strategic Considerations

- Moving away from high-risk product profile
- Balancing thoroughness with urgency
- Building sustainable e-commerce operation vs. one-time launch
- Team capability development for long-term success
- AI adoption as competitive advantage

Meeting Organizer's Note

As meeting organizer, I (Greg) take responsibility for the meeting not following the prepared agenda. The conversation evolved into a valuable discovery discussion that provided important context about team capabilities, past experiences, and operational complexity. However, the structured agenda items (project scope review, priority list establishment, action planning) were deferred.

The Wednesday follow-up meeting will address these structured elements with the benefit of preliminary analysis data, allowing for more informed decision-making rather than proceeding with assumptions.

Document Prepared By: Greg Kowalczyk **Date:** January 5, 2026 **Distribution:** Todd McDaniel, Douae Lahlou

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Appendix: Terminology Reference

- **3PL:** Third-Party Logistics provider
- **DDP:** Delivered Duty Paid (seller pays all shipping and customs)
- **FOB:** Free On Board (buyer arranges shipping from port)
- **LCL:** Less than Container Load
- **EAN:** European Article Number (13 digits)
- **UPC:** Universal Product Code (12 digits)
- **2P:** Second-Party (wholesale to retailer who resells)
- **3P:** Third-Party (marketplace seller)
- **FBA:** Fulfillment by Amazon
- **CARM:** Canadian Assessment and Revenue Management
- **LLM:** Large Language Model
- **SEO:** Search Engine Optimization
- **SKU:** Stock Keeping Unit