FINAL SUMMARY — Complete Action Plan for Todd

Date: December 13, 2025 **Status:** Ready to send email and prepare for call **Key Updates:** Realistic pricing ($225/hour), EcomExperts positioning, reality check on expectations

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🎯 THE SITUATION (Your Reality Check)

What Greg Knows:

1. **Todd is talking to EcomExperts** (US consultant, monthly fee model)
2. **Amazon.ca is 10x smaller than US market** (lower volume, slower path to profitability)
3. **Product validation ≠ guaranteed success** (depends on PPC budget, execution, timing, market conditions)
4. **First order almost always loses money** (break-even on first order = win)
5. **Todd might be looking for a "magic bullet"** (unrealistic expectations = red flag)

Greg's Concerns:

- "I don't want to over-promise and under-deliver"
- "Success depends on many variables I can't control (PPC budget, creative quality, execution)"
- "If Todd has unrealistic expectations (profit in 90 days, $500/month PPC budget), I'll be blamed when it doesn't work"
- "I need to qualify Todd BEFORE committing to Phase 0"

Greg's Goal:

- Qualify Todd as a client (realistic expectations, adequate budget, strong execution capability)
- Set expectations upfront (validation reduces risk, doesn't guarantee success)
- Protect reputation (don't take money from wrong client)

- Complement EcomExperts (don't compete)

📁 **COMPLETE DOCUMENT PACKAGE (8 Files)**

🔴 **PRIORITY 1: Read These First**

1. REALITY_CHECK_Expectations.md ⚠️ **READ THIS FIRST** - The 5 harsh realities Todd needs to understand - 6 qualifying questions to ask on the call (BEFORE positioning Phase 0) - 5 red flags (when to walk away) - Expectation-setting script - "Walk Away" script (if Todd has unrealistic expectations)

Why this matters: This protects you from taking on the wrong client. If Todd expects guaranteed profit in 90 days with a $500/month PPC budget, no amount of product validation will save him — and you'll be blamed.

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2. ACTION_GUIDE_EcomExperts.md 📋 **YOUR CALL PLAYBOOK** - **UPDATED:** Qualifying questions are now PRIORITY 1 (before positioning) - How to position vs EcomExperts (complement, don't compete) - What TO do and what NOT to do - 4 likely scenarios and how to handle each - Quick comparison chart (you vs EcomExperts)

Why this matters: This is your step-by-step guide for the call. Qualify Todd first, understand EcomExperts second, position Phase 0 third.

🟡 **PRIORITY 2: Send This Email**

3. EMAIL_With_EcomExperts_Positioning.md 📧 **SEND THIS TODAY** - Acknowledges EcomExperts (not ignoring the elephant in the room) - Positions you as complementary (validation before execution) - Proposes Phase 0 at $225/hour, $10,500 cap - Emphasizes Canada expertise - Sets homework for Todd (Coleman check, insurance quotes) - Includes P.S. about Canada specialization

Why this matters: This is the right email to send given the EcomExperts situation. It's collaborative, not competitive.

🟢 **PRIORITY 3: Reference During Call**

4. COMPETITIVE_Positioning_EcomExperts.md 🌲 **DEEP DIVE** - What we know (and don't know) about EcomExperts - Likely EcomExperts pricing models (10-15% of sales, or $2K-5K/month) - 4 differentiation strategies - What NOT to do (don't trash-talk, don't assume competition)

5. NURISE_Product_Analysis_RedFlags.md 🔍 **PRODUCT DEEP DIVE** - 9 product categories analyzed - Specific SKU recommendations (GO/HOLD/KILL) - Top 5 red flags (Coleman, trampolines, high-cube floats, seasonality, 2026 NEW) - Top 3 opportunities (swim accessories, sleeping pads, pet products)

6. REVISED_Pricing_Approach.md 💰 **PRICING STRATEGY** - Realistic time estimate: 35-45 hours (not 18-20) - Three pricing options: Hourly with cap / Tiered fixed-fee / 3-month retainer - Risk disclaimer (success depends on execution, not just validation)

🔵 **PRIORITY 4: Background Reference**

7. NURISE_Consulting_Framework.md 📋 **METHODOLOGY** - Complete 4-phase framework - Product scorecard (6-factor framework) - **NOTE:** Pricing is outdated ($4.5K), use REVISED_Pricing_Approach.md instead

8. PRICING_Decision_Tree.md 🌲 **NEGOTIATION GUIDE** - How to handle every response Todd might give - Fallback options if he says "too expensive" - Boundary-setting scripts

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✅ **YOUR ACTION PLAN (Step-by-Step)**

STEP 1: Send the Email (TODAY — Dec 13)

Send: EMAIL_With_EcomExperts_Positioning.md

Key points: - Phase 0: $225/hour, 35-45 hours, $10,500 cap - Positions you as complementary to EcomExperts (validate before execute) - Emphasizes Canada expertise - Proposes call next week

STEP 2: Prepare for the Call (This Weekend)

Read in this order: 1. **REALITY_CHECK_Expectations.md** — Memorize the 6 qualifying questions 2. **ACTION_GUIDE_EcomExperts.md** — Your call playbook 3. **NURISE_Product_Analysis_RedFlags.md** — Specific SKU insights for reference

Do your homework: - Search Amazon.com for Coleman SKUs (90708-90711, 90703-90704) - Run high-cube items through FBA fee calculator - Review top 5 red flags and top 3 opportunities

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STEP 3: The Call (Next Week — Dec 17-19)

Call Structure (60 minutes):

Part 1: QUALIFY TODD FIRST (15-20 minutes)

Ask the 6 qualifying questions (BEFORE you pitch anything): 1. "What does success look like for you in 12 months?" 2. "What's your PPC budget for the first 6 months?" 3. "What happened with your last Amazon attempt? Why did you lose money?" 4. "Do you have budget for professional photography and A+ Content?" 5. "How much time can your internal team member dedicate to Amazon daily?" 6. "What's your timeline expectation for profitability?"

Listen for red flags: - Unrealistic expectations (profit in 90 days) - Low PPC budget ($500/ month or less) - No ownership of past mistakes (blames external factors only) - No budget for creative (wants to use factory photos) - No time commitment (team member only has "a few hours a week") - Impossible timeline (need results in 3 months or project gets killed)

⚠️ **IF 2+ RED FLAGS: Use the "Walk Away" script from REALITY_CHECK_Expectations.md**

If Todd's answers are GOOD → Proceed to Part 2

Part 2: UNDERSTAND ECOMEXPERTS (10 minutes)

Ask about EcomExperts: 1. "What does EcomExperts' proposal include?" 2. "What's their monthly fee and contract length?" 3. "Are they Canada-focused or US-focused?" 4. "How do you see me fitting in with EcomExperts?"

Listen for: - Do they do validation or just execution? - What's the monthly cost? ($2K? $3K? $5K?) - Does Todd want to choose (you OR EcomExperts) or use both?

If Todd wants to use BOTH → Position as complementary (you validate, they execute)

Part 3: SET EXPECTATIONS (10-15 minutes)

Use the expectation-setting script from REALITY_CHECK_Expectations.md:

"Todd, I want to be transparent about what Phase 0 can and can't do.

What I CAN do: - Validate product selection, identify low-risk SKUs, eliminate high-risk SKUs - Build margin models so you know profitability potential IF all other factors align

What I CANNOT do: - Guarantee sales volume (market demand outside my control) - Guarantee Amazon Retail won't list your products tomorrow - Guarantee your PPC budget will be adequate (assumes $1,500-3,000/month minimum) - Guarantee execution quality (poor creative or weak PPC management kills good products) - Make Amazon.ca bigger than it is (10x smaller than US market)

Think of Phase 0 as risk reduction, not a crystal ball.

I can prevent you from ordering $15K-20K of bad products. That's value.

But I can't guarantee the remaining products will be home runs. That depends on PPC budget, creative quality, timing, execution, and market conditions.

Also: Amazon is a 12-18 month play. First container is almost always an investment (break-even or small loss). Second container is where profit starts.

Does that align with your expectations?"

If Todd says "Yes, I understand" → Proceed to Part 4 If Todd pushes back → Red flag, consider walking away

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Part 4: POSITION PHASE 0 (10-15 minutes)

Now that Todd is qualified and expectations are set, pitch Phase 0:

"Great. Here's how I'd structure Phase 0:

Product Validation & Risk Assessment: - Validate all 50+ SKUs for Canadian market - GO/HOLD/KILL recommendations based on data - Margin models with all Canadian costs (FBA.ca, GST/HST, PPC, insurance, storage) - Competitive research (Amazon.com + .ca, Amazon Retail threat assessment) - Revised container plan (kill bad SKUs, reallocate capital to winners)

Pricing: - $225/hour, estimated 35-45 hours - Hard cap: $10,500 (you won't pay more than this) - Weekly time tracking (full transparency) - Timeline: 2-3 weeks (complete by early Jan before you lock order)

Then you decide: - Take GO list and hand to EcomExperts for execution - Continue with me for setup + training (Phase 1-2) - Use both (me for Canada strategy, EcomExperts for execution)

Does that make sense?"

Part 5: WALK THROUGH RED FLAGS (10 minutes)

Show Todd the top 5 red flags in his draft order: 1. Coleman airbeds = Amazon Retail threat 2. Trampolines = insurance costs unknown 3. Everluxe Floating Mat = 0.802 CBM = storage fee death 4. 90% summer products = seasonal concentration 5. 2026 NEW SKUs = no sales data = inventory risk

Use specific examples from NURISE_Product_Analysis_RedFlags.md

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Part 6: CLOSE (5 minutes)

"Todd, Phase 0 is a $10,500 investment that prevents a $50K mistake.

If we identify and kill $15K-20K of bad SKUs before you order them, Phase 0 pays for itself.

Then you have validated products to launch (whether with EcomExperts, your internal team, or continued support from me).

Does that make sense? Ready to move forward?"

STEP 4: After the Call (Next Steps)

If Todd says YES: - Send engagement letter (1-page SOW: scope, deliverables, $225/hour, $10,500 cap) - Request 50% deposit ($5,250) or set up weekly invoicing - Schedule kickoff call for Dec 18-20 - Start Phase 0

If Todd says "Let me think about it": - Send follow-up email summarizing call - Reiterate timeline urgency (need to start by Dec 20 to finish by Jan 3) - Offer to answer questions - Set follow-up date (Dec 18-19)

If Todd exhibits 2+ red flags: - Use "Walk Away" script from REALITY_CHECK_Expectations.md - Be professional but firm - Protect your reputation (don't take money from wrong client)

🔑 KEY TALKING POINTS (Memorize These)

1. Qualifying Todd (First Thing on Call)

"Before we dive into Phase 0, I want to make sure we're aligned on expectations. What does success look like for you in 12 months?"

2. Setting Expectations (After Qualifying)

"I want to be transparent: Phase 0 is risk reduction, not a magic wand. I can prevent you from ordering bad products, but I can't guarantee sales volume. That depends on PPC budget, execution, timing, and market conditions. Does that make sense?"

3. Positioning vs EcomExperts (After Expectations)

"EcomExperts is great for execution. I complement them by doing upfront validation with a Canada-specific lens. Phase 0 with me happens BEFORE EcomExperts. I validate the products, you get a GO/HOLD/KILL list, then EcomExperts takes that and executes."

4. Pricing (After Positioning)

"Phase 0 is $225/hour, estimated 35-45 hours, hard cap at $10,500. You get full transparency (weekly time tracking) and cost certainty (cap protects you from overruns). If we kill $15K-20K of bad SKUs, Phase 0 pays for itself."

5. Closing (End of Call)

"Phase 0 prevents the $50K mistake. Even if you use EcomExperts after, you're starting with validated products — not guesses. Does that make sense? Ready to move forward?"

⚠️ RED FLAGS (When to Walk Away)

IF 2+ OF THESE, CONSIDER WALKING AWAY:

1. ❌ **Unrealistic expectations:** "We need profit in 90 days"
2. ❌ **Low PPC budget:** "$500/month is all we have"
3. ❌ **No ownership of past mistakes:** "Last time we lost money because Amazon changed the algorithm"
4. ❌ **No budget for creative:** "Can we just use factory photos?"
5. ❌ **No time commitment:** "Our team member has a few hours a week"
6. ❌ **Looking for magic bullet:** "Just tell us which products to order and we'll be fine"

Use "Walk Away" script from REALITY_CHECK_Expectations.md

"Todd, based on our conversation, I'm concerned our expectations might not be aligned. Amazon.ca requires patience, capital, and strong execution. If those constraints are non-negotiable, Amazon might not be the right channel right now. I don't want to take your money and set you up for failure."

✅ FINAL CHECKLIST (Before Sending Email)

- [ ] Reviewed REALITY_CHECK_Expectations.md (qualifying questions, red flags)
- [ ] Reviewed ACTION_GUIDE_EcomExperts.md (call playbook)
- [ ] Reviewed NURISE_Product_Analysis_RedFlags.md (specific SKU insights)
- [ ] Prepared to qualify Todd BEFORE pitching Phase 0
- [ ]

Ready to set realistic expectations (validation ≠ guaranteed success)

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Ready to position vs EcomExperts (complement, not compete)

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Know your "Walk Away" triggers (2+ red flags)

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Confident in $225/hour pricing (you're worth it)

💡 BOTTOM LINE

Greg, you're absolutely right to be cautious.

Your concerns are valid: - Amazon.ca is 10x smaller than US (lower volume, slower profitability) - Product validation ≠ guaranteed success (depends on execution, budget, timing) - First order almost always loses money (break-even = win) - Todd might have unrealistic expectations (magic bullet syndrome)

Your job: 1. **Qualify Todd FIRST** (before pitching anything) 2. **Set realistic expectations** (validation reduces risk, doesn't guarantee success) 3. **Protect your reputation** (don't take money from wrong client) 4. **Complement EcomExperts** (validate before execute, Canada expertise)

If Todd has: - ✅ Realistic expectations (break-even by month 6-9, profit by month 10-12) - ✅ Adequate PPC budget ($1,500-3,000/month minimum) - ✅ Budget for professional creative ($2K-5K) - ✅ Time commitment (1-2 hours/day from internal team) - ✅ Ownership of past mistakes (not just blaming external factors)

→ PROCEED. Todd is a good client.

If Todd has: - ❌ Unrealistic expectations (profit in 90 days) - ❌ Low PPC budget ($500/month or less) - ❌ No budget for creative (factory photos only) - ❌ No time commitment (few hours a week) - ❌ Looking for magic bullet (no ownership of execution)

→ WALK AWAY. Todd is the wrong client.

Your reputation is worth more than $10.5K from the wrong client.

You got this, Greg. 🚀

Send the email, prepare for the call, qualify Todd, set expectations, and protect your reputation.

End of Final Summary