Clariva

SAMPLE · FULL REPORT · GROWTH PRACTICE

GROWTH AUDIT

Specialty coffee shop · Victoria, BC

DEMONSTRATION DOCUMENT · ALL FIGURES ILLUSTRATIVE

$63.6k	$73.8–76.3k	+$6.7–8.4k
REVENUE NOW / MO	90-DAY TARGET / MO	GP OPPORTUNITY / MO

WHAT THIS IS

The Growth Audit in the format a client receives – published as a sample on an illustrative business. Decision tables are masked in this public copy.

ENGAGEMENTS

Growth Snapshot CA$790 · Growth Audit CA$3,890 · Growth Advisory CA$2,490/mo

PREPARED BY

Clariva · Growth practice · Daria, marketing strategist

CONTACT

info@clarivagroups.ca · clarivagroups.ca

HOW TO READ THIS REPORT

CONTENTS & METHOD

SECTION 01

KEY FINDINGS AND DECISIONS

ACTIVE CLIENTS	VISITS / CLIENT	AVERAGE TICKET	CLIENT LIFETIME
2,350 per month	2.46× per month	$10.98 CAD	6.7 mo average, before churn

THE DIAGNOSIS

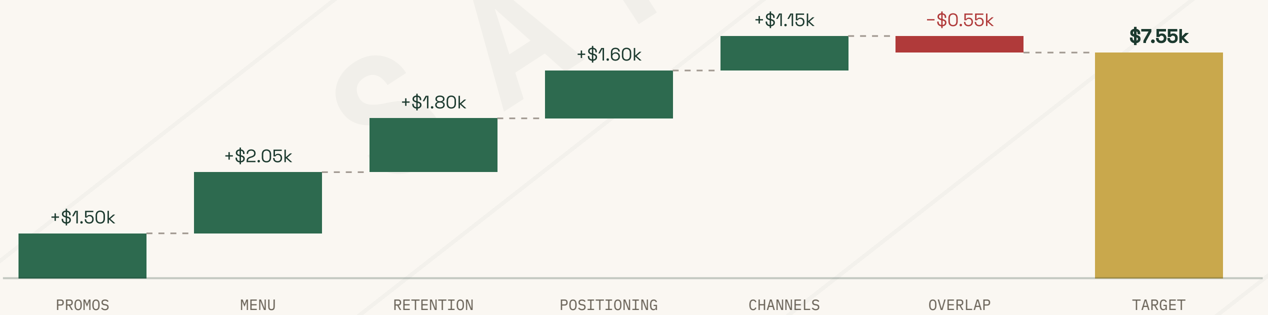
The business already knows how to attract demand – but under-monetizes it in three places: the wrong customer mix is being grown, each visit is monetized below its potential, and there is almost no engineered second visit. On top of that, part of the gross profit is being destroyed by the current discounts and a weak media mix.

#	THE LEAK	WHAT THE DATA SHOWS	DECISION	EFFECT	TIMING
1	**Promos eat the margin**	Happy Hour needs +34.5% volume to break even; it actually delivers +18%.	STOP / rebuild	+$1.45–1.55k GP/mo	7 days
2	**The menu under-monetizes the visit**	38% of tickets are drink-only; 13 tail SKUs occupy 46% of the menu for 13.7% of GP.	Menu cut + food attach + bundles	+$1.8–2.3k GP/mo	2–4 wks
3	**Too few repeat visits**	90-day repeat rate 24%; effectively no CRM sequence after the first purchase.	7/30/60/90 engine + referral	+$1.6–2.0k GP/mo	4–8 wks
4	**Marketing ignores the most valuable customers**	Social + Family are 43.8% of the base but 74.0% of revenue.	Reposition around the meeting / family job	+$1.4–1.8k GP/mo	4–12 wks
5	**31% of media spend sits in weak channels**	$1,300/mo goes to boosted posts and flyers at CAC $33–67.	Reallocate the same $3.6k budget	+$1.0–1.3k GP/mo	4–8 wks
6	**Digital journey sells coffee, not the occasion**	Current message is bean origin / specialty; only ~11% of Instagram followers are local.	Website / GBP / IG rebuilt around social scenarios	Enabler + conversion lift	2–6 wks

The financial bridge: why the pools don't simply add up

STEP	REVENUE / MO	GROSS PROFIT / MO
Sum of the five levers above, taken independently	$11.9–15.1k	$7.3–9.0k
Less: overlap between levers (a bundle sale and a mix-shift sale can be the same sale) and incomplete execution	-$1.7–2.3k	-$0.6k
Realistic steady-state target	**+$10.2–12.8k**	**+$6.7–8.4k**

Annualized: +$122–154k revenue and +$80–101k gross profit. A report that adds its own levers without an overlap deduction is overselling – this one deducts it explicitly.



The same bridge, drawn: midpoints of the ranges above, gross profit per month. The overlap deduction is what keeps the target honest.

SECTION 02

CUSTOMER BASE & POSITIONING

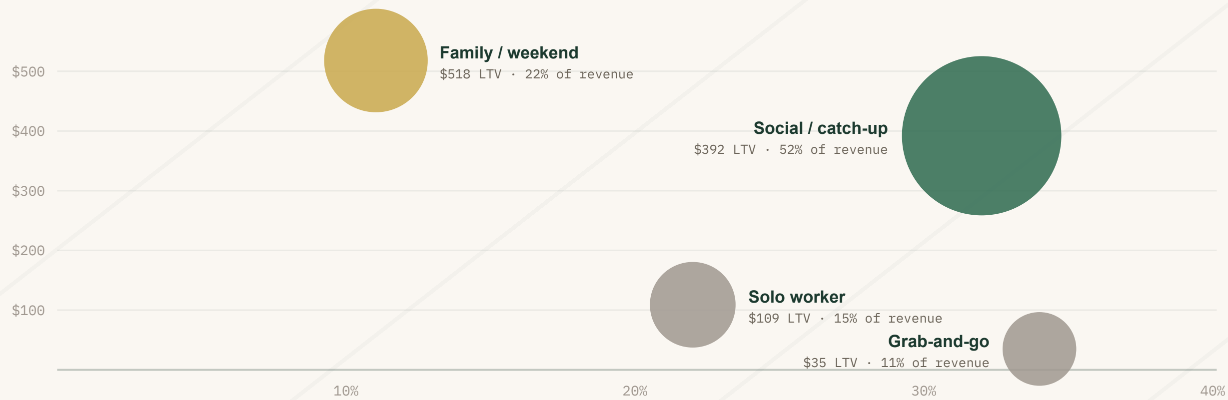
2.1 Structure of the base: 43.8% of customers create 74% of revenue

JTBD SEGMENT	CUSTOMERS	% BASE	FREQ / MO	TICKET	ACTIVE LIFE	REVENUE LTV	% REVENUE	PRIORITY
Grab-and-go	800	34%	1.6×	$5.50	4 mo	$35	11%	LOW
Solo worker	520	22%	2.4×	$7.60	6 mo	$109	15%	MEDIUM
Social / catch-up	760	32%	3.3×	$13.20	9 mo	$392	52%	HIGH
Family / weekend	270	11%	2.8×	$18.50	10 mo	$518	22%	MAX

Segments built from receipt-level baskets, visit context (dine-in vs takeaway, party size, time of day) and staff-tagged visit reasons over 12 months. Revenue LTV = ticket × frequency × active life.

> WHAT THIS MEANS FOR THE BUSINESS
>
> Grab-and-go is the largest segment by headcount – and produces 11% of revenue at a $35 lifetime value. Social / catch-up and Family / weekend are not the most numerous, but they form **74% of revenue** at LTVs of $392–518. Growth must come not from maximizing traffic, but from increasing the share and frequency of the high-LTV scenarios.

The segment map: headcount is on the right – the money is at the top



Y = revenue LTV ($), X = % of the client base, bubble area = monthly revenue. Computed from the segment table above. The two gold-and-green scenarios – not the largest crowds – are where growth pays.

2.2 Which segments to grow – and which not to target

SEGMENT	DECISION	WHY
[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	IN THE CLIENT VERSION [illegible]
[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]

2.3 What the high-LTV customer is actually buying

SEGMENT	THE JOB TO BE DONE	TRIGGERS	BARRIERS
[redacted]	[redacted] IN THE CLIENT VERSION	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]	[illegible]

Demand status: Social is formed demand – the person is already choosing a venue, usually via Maps, recommendations and the look of the space. Family is partly formed – they search café / brunch / family-friendly, not "specialty coffee" as a category.

2.4 The positioning gap: the product is sold as coffee – the high-LTV customer buys a meeting

ELEMENT	TODAY	NEW VERSION	WHAT IT CHANGES
[redacted]	[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]	[illegible]
[redacted]	[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]	[illegible]
[redacted]	[redacted]	[redacted]	[redacted]

IN THE CLIENT VERSION

RECOMMENDED POSITIONING LINE

“The neighbourhood spot to catch up. Specialty coffee, food to share and a warm place to meet in Victoria.” – used verbatim on the website hero, the Google Business Profile description, the Instagram bio and the outdoor sign.

2.5 What to change in the product and the experience to earn that positioning

PRODUCT POINT	TODAY	CHANGE	ECONOMIC EFFECT	CONF.
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

IN THE CLIENT VERSION

THE MIX-SHIFT MATH

If behaviour and acquisition shift just **5% of the base** out of low-LTV scenarios into Social / Family, the full mathematical potential exceeds $3.5k revenue/month. The financial model includes only $2.6–3.3k – deliberately trimmed for incomplete execution and for overlap with the menu bundles counted in Section 04.

SECTION 03

COMPETITORS & ENVIRONMENT

3.1 The competitive scan: a real competitor is whoever the customer considers for the same job

COMPETITOR / ALTERNATIVE	JOB IT PERFORMS	AVG TICKET*	KILLER FEATURE	WEAKNESS	THREAT	WHAT WE DO ABOUT IT
National value chain	Fast / familiar / cheap	~$3.20	Speed + habit	No social experience; weak atmosphere	LOW	Copy the speed and menu clarity; never enter a price war.
Global coffee chain	Get work done / predictable product	~$5.80	Predictability at scale	Corporate, crowded, weak local feel	MED	Copy the frictionless journey; differentiate on warmth and locality.
Local grab-and-go specialty	Quality coffee, fast, to go	~$5.50	Specialty credibility	Minimal seating; the social job is not served	MED	Don't copy the format; keep product credibility.
Local specialty + brunch	Specialty + a meal / a meet-up	~$7.20	Food layer	Busy and noisy; poor for a calm catch-up	MED-HIGH	Copy the food economics; differentiate on calm and conversation.
Local bakery / brunch café	Eat and meet	$10–20	Food + visual display	Slower; often a heavy meal	MED-HIGH	Copy the display and shareable items; stay a light café format.

** Reference points from the project's field scan, used as relative price context — not as a current public price list. Figures illustrative.*

3.2 PEST: the external factors that should shape decisions now

FACTOR	SIGNAL	RISK / OPPORTUNITY	DECISION
P · Regulation	Rising food-service compliance, labour and standards costs	A complex menu gets more expensive even with flat demand	Cut low-volume prep; every new SKU passes a "GP vs complexity" test.
E · Economics	Price-sensitive scenarios compare harder; high-LTV social / family pay for the experience	Discounts attract the wrong mix and dilute margin	Don't fight chains on price; give visible value through bundles.
S · Social CRITICAL	Demand for local places to connect; the wish for "a place of one's own"	Atmosphere becomes part of the product, not décor	Make social connection the central message and the product scenario.
T · Technology	Local choice happens via Maps, reviews, short-form video – and first-party CRM	A weak digital card loses ready demand; no CRM means no repeats	GBP review engine, UTM discipline, POS tags, SMS / email triggers.

3.3 What the reviews say: the space is already stronger than the product story

SOURCE	THEME	SIGNAL	BUSINESS CONCLUSION
This business	Atmosphere / space	67% of positive mentions	The main proof asset of the future positioning.
This business	Socializing / catch-up	41%	Customers have already “hired” the café for exactly the job we need to scale.
This business	Limited food	23% of complaints / requests	A direct signal to grow food attach and dwell time.
This business	Not kid-friendly	12%	Family LTV is the highest in the base – and the product erects a barrier to it.
Global / national chains	Crowded / generic	Qualitative pattern from the scan	The opening to own “personal / local”.
Local grab-and-go specialty	Limited seating	Qualitative pattern	Does not compete for the long social session.
Local specialty + brunch	Busy / noisy	Qualitative pattern	The main open gap: a calm meeting plus good food.

94 public reviews of this business coded by theme; competitor patterns from public review records collected during the field scan. Figures illustrative.

> THE GOLD SEAM
>
> Nobody in the field owns the combination: **specialty quality + a calm social atmosphere + shareable food + family-friendly details**. This business already holds two of the four – the space and the product. Differentiation therefore requires no rebrand: it requires finishing the seating, the food layer, the communication and the CRM.

3.4 Action plan from the competitive analysis

ACTION	WHERE	KPI	EXPECTED EFFECT
[redacted]			

IN THE CLIENT VERSION

SECTION 04

MENU, MARGIN & AVERAGE TICKET

4.1 What happens inside the ticket today

SKUS	UNITS SOLD	ITEMS / TICKET	FOOD ATTACH
28 menu positions	10,450 per month	1.80 average	62% 38% of tickets are drink-only

REVENUE	GROSS PROFIT	GROSS MARGIN	AVG TICKET
$63.6k per month	$40.8k per month	64.1% weighted	$10.98 per transaction

THE GROWTH FORMULA

Gross profit = active customers × visit frequency × average ticket × gross margin. The menu has to lift the last three multipliers at once: what to buy now, what to add to the ticket, and why to come back.

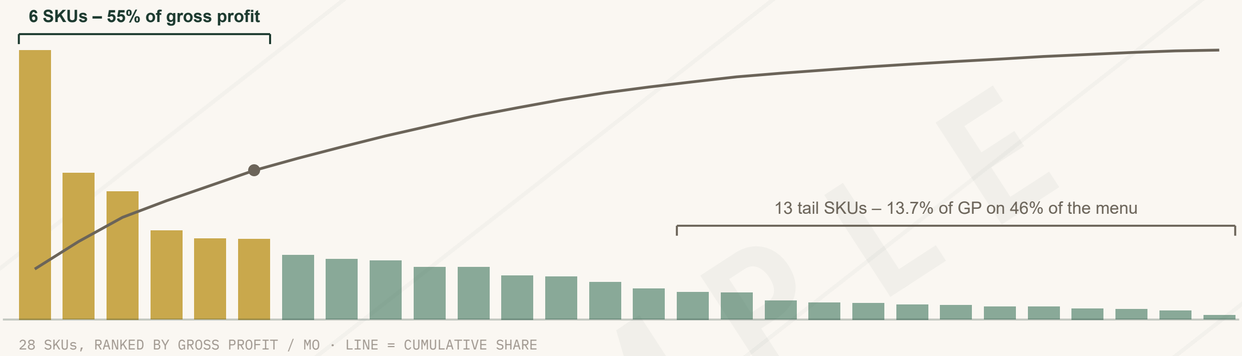
4.2 Three-dimensional ABC: demand / revenue / gross profit

Each SKU carries a three-letter code, read left to right: **Units** (demand), **Revenue**, **Gross-profit contribution**. `BAA` = mid demand but a high share of revenue and GP; `CCB` = weak demand and revenue, but the margin or a strategic role can still justify the slot.

THE ABC VERDICT

The 6 strongest SKUs create **~55% of gross profit**. Thirteen tail positions occupy 46% of the menu and deliver 13.7% of GP. That does not mean “delete everything C” – the Kids Snack, for instance, exists for the Family job. But every C-SKU must either support a high-LTV scenario, run as a seasonal test, or go.

Where the gross profit concentrates



Computed from the decision table on the next pages (revenue × gross margin per SKU). Figures illustrative.

4.3 The decision on every position

Every SKU is graded on three axes and given one of five verdicts – keep, scale, optimize, test or cut – with the reason attached. The extremes of the list are shown here; the client version carries all 28 rows.

SKU	ABC	PORTFOLIO	UNITS	REVENUE	GM%	ROLE	PRICE	DECISION
Latte	AAA	A – protect	1,709	$11,108	69%	Hero / core	$6.50	**Keep.** Anchor of the bundles; "large?" asked by default.
Breakfast Sandwich	AAA	A – protect	783	$7,438	56%	Ticket driver	$9.50	**Scale.** Available until close; combo with a drink.
Americano	AAA	A – protect	1,068	$4,806	76%	Margin core	$4.50	**Keep.** Never discount; use in loyalty.
Croissant	AAA	B – optimize	641	$3,077	56%	Cross-sell	$4.80	**Scale.** Display at the register; pair / morning bundle.
Avocado Toast	BAA	B – optimize	249	$3,112	54%	Premium food	$13.00 test	**Optimize.** Limit hours if prep >5 min; +$0.50 price test.
18 OF 28 ROWS HIDDEN IN THIS SAMPLE · THE CLIENT VERSION GRADES EVERY POSITION ON THE MENU								
Hot Chocolate	BBB	C – tail	128	$704	67%	Family support	$5.50	**Keep strategically** for the family job, despite the grade.
Herbal Tea	CCC	C – tail	107	$455	80%	Tea core	$4.25	**Keep** as the non-caffeine option.
Salad Bowl	CBC	C – tail	64	$704	45%	Complexity	remove	**Cut.** Low margin, high prep complexity.
Soup Cup	CCC	C – tail	71	$497	50%	Seasonal	seasonal	**Seasonal only.** Not a year-round position.
Kids Snack	CCC	C – tail	57	$200	60%	Family enabler	$3.50	**Keep strategically**; bundle with hot chocolate.

A weak grade is not an automatic cut: Hot Chocolate and Kids Snack stay because the Family job needs them. That judgement is what the grade cannot make on its own.

4.4 Where the menu cannibalizes itself

ZONE	SKUS	PROBLEM	FIX
Sweet latte cluster	Matcha / Mocha / Chai / Hot Chocolate	Four near-identical choice scenarios splitting one volume pool	Two core + one rotating seasonal; Hot Chocolate stays as the family enabler.
Tea cluster	Earl Grey / Breakfast / Herbal	Three positions on low volume; Breakfast duplicates	Earl Grey + Herbal stay; Breakfast Tea goes.
Pastry cluster	Croissant / Cookie / Muffin / Banana Bread / Granola	Too many similar add-ons – each starves	Croissant + Cookie core; one rotating bakery special; cut 2–3 tails.
Slow food	Avocado / Parfait / Salad / Soup	Low volume + prep complexity + queue risk	Avocado limited hours; Soup seasonal; Salad / Parfait cut or redesigned.
Premium coffee	Pour-over vs core espresso	Not price cannibalization – a service-speed risk	Off-peak experience only; never promoted at weekend peak.

4.5 The new product ladder

ROLE	PRODUCT	TASK	KPI
Entry	Drip 12 oz · $3.75	Remove the first-purchase barrier; never price it lower	Conversion to 2nd visit
Core	Latte / Cappuccino / Matcha	The obvious main choice – 60–70% of menu attention	Core mix / GP
Cross-sell	Croissant / Cookie / Breakfast Sandwich	Food attach at the moment the wallet is already open	Attach rate
Upsell	Large / premium milk	An upgrade that costs no extra order or time	+$ / transaction
Bundle	2 drinks + pastry · $17.20	Monetizes the social occasion at only ~5.5% off list	Pair ticket
Downsell	Small drink + cookie · $7.90	Keeps the price-sensitive customer inside without discounting core	Retention
Maximizer	Beans / gift card	The trust upsell + gifting	High-margin revenue
Return trigger	7-day offer / seasonal rotation	Extends the chain past the first ticket	Frequency / LTV

4.6 Rebuilding the menu and the display

POINT	TODAY	CHANGE	WHY
[redacted]			

IN THE CLIENT VERSION

4.7 The financial effect of the menu block

LEVER	CALCULATION	REVENUE / MO	GP / MO	CONF.
Food attach +8 pts	~463 extra add-on sales × ~$4.80	+$2.22k	+$1.25k	MED-HIGH
Pair bundle	~250 social transactions × +$3.20 net mix	+$0.80k	+$0.45k	MED
Upsell large / premium	~300 upgrades × ~$1.20	+$0.36k	+$0.28k	HIGH
Menu simplification / throughput	+2% transactions at peak-equivalent	+$1.27k	+$0.80k	MED
Selective price tests	Matcha / pour-over / avocado	+$0.25–0.40k	+$0.22–0.35k	MED

NET OPPORTUNITY OF THIS BLOCK

Before overlaps the sum exceeds $4.9k revenue/month. To avoid counting the same purchase twice, the overall target includes **$3.1–3.8k revenue and $1.8–2.3k GP per month** from the menu block.

SECTION 05

PROMOTIONS: THE ECONOMICS OF EACH MECHANIC

5.1 Happy Hour −20%: more traffic, less gross profit

METRIC	WITHOUT PROMO	WITH PROMO	CHANGE
Drink transactions / week in the window	400	472	+18%
Average drink price	$7.10	$5.68	−20%
Revenue / week	$2,840	$2,681	−$159
COGS / drink	$1.56	$1.56	–
GP / drink	$5.54	$4.12	−25.6%
GP / week	**$2,216**	**$1,945**	**−$271**

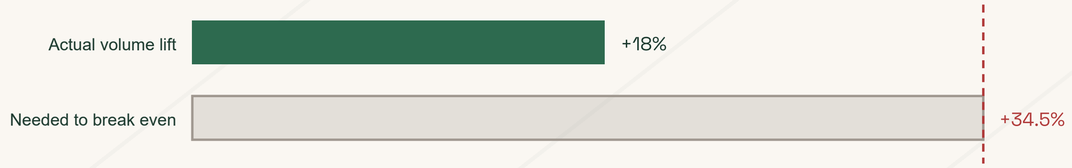
Figures are for the weekday afternoon promo window only; all-day SKU volumes in Section 04 are unaffected.

VERDICT – STOP

Break-even needs roughly **538 transactions/week (+34.5%)** in the window. The actual lift is 472 (+18%). The current mechanic destroys about **$1.17k of GP per month** – and trains existing customers to wait for the discount.

WHAT REPLACES IT

The traffic goal Happy Hour was meant to serve is handled by the targeted mechanics in 5.4 – each one buys a specific behaviour, not a cheaper version of behaviour that was already happening.



THE GAP – 16.5 PTS SHORT – IS THE −$271 OF GP EVERY WEEK

5.2 First-order discount: not a loss-maker – but too weak to scale

PARAMETER	VALUE	COMMENT
Redemptions / mo	280	Promo code
Discount	15%	$1.65 on the average $10.98 ticket
Truly incremental share	38%	~106 purchases that would not have happened anyway
90-day repeat, promo cohort	15%	below the 24% base rate – the discount buys weaker customers
Marketing / creative	$180	for the period
Net incremental GP	~+$0.27k / mo	working model
Effective LTV:CAC	**~1.1×**	**far too thin a cushion to scale**

VERDICT – FIX, DON'T SCALE

The problem is not the discount itself: it buys the first ticket but not the second. The mechanic earns its place only if the promo code collects consent and automatically fires the 7-day return offer. Scale rule: incremental share ≥45%, 90-day repeat ≥22%, GP LTV:CAC ≥2.5×.

5.3 Free donut with a latte: the volume never pays for the giveaway

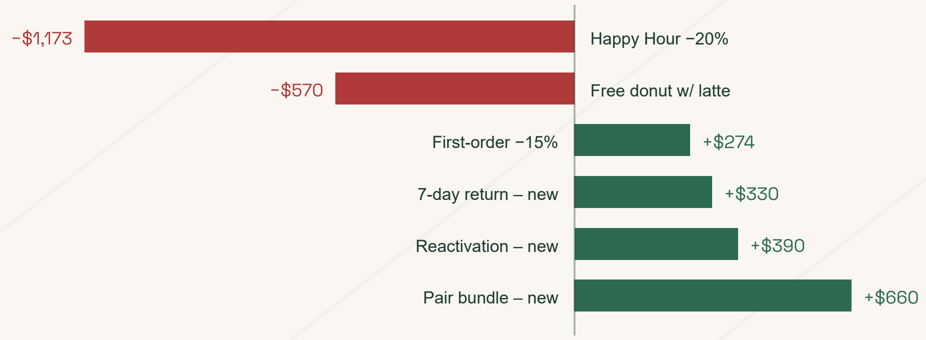
PARAMETER	VALUE	LOGIC
Latte orders in the promo window, baseline	456 / mo	modelled baseline for the limited afternoon window
Orders with promo	520 / mo	+14%
Latte GP without the gift	$4.50	$6.50 price − $2.00 COGS
Promo GP / order	$3.25	less ~$1.25 gift COGS
Direct GP delta	−$0.36k / mo	the volume lift does not cover the gift
Cannibalized pastry GP	~−$0.21k / mo	some recipients would have paid for food
Net effect	**~−$0.57k / mo**	**preliminary**

VERDICT — REBUILD

Don't hand free food to anyone who orders a latte. Move the free item to where it changes the behaviour we need: a lapsed customer with two drinks, a referral visit, or a first family visit. Then the gift becomes an acquisition / retention cost – not a discount to the existing base.

Data status: Happy Hour is computed on the actual configured mechanic. For the first-order and donut promos the POS export lacked full redemption logs; the working models above carry threshold rules and must be replaced with actual redemptions / incrementality / repeat at final validation.

The promo portfolio at a glance



NET GP EFFECT, $ / MONTH · RED DESTROYS MARGIN, GREEN BUYS A SPECIFIC BEHAVIOUR

Monthly steady-state. 7-day return = 90-day GP LTV ÷ 3; reactivation = one wave per month; modelled mechanics marked in 5.2–5.3 – validate against POS redemptions.

5.4 What to run instead of blanket discounts

MECHANIC	OFFER	THE HOLE IT CLOSES	ECONOMICS	KPI
[redacted]				

IN THE CLIENT VERSION

5.5 The rule for any future promotion

01 Fix the target behaviour first – first visit, second visit, food attach, referral, reactivation. Never “increase sales in general”.

02 Compute baseline GP without the promo. If the baseline is unknown, the promo cannot be evaluated.

03 Compute break-even: how many extra transactions must cover the discount + COGS + media cost.

04 Separate incremental customers from those who would have bought anyway. A discount to the existing base is cannibalization.

05 Track not just redemptions but the 30/60/90-day repeat and GP LTV of the new cohort.

06 Write the kill / scale threshold before launch. A promo without a stop-loss becomes a permanent margin leak.

SECTION 06

ACQUISITION & RETENTION

6.1 Customer stages: today the system ends at the first purchase

STAGE	TASK	INSTRUMENTS	TODAY	DECISION
Not thinking about it	Create the occasion / scenario	Local UGC, creators, neighbourhood partnerships	Occasional UGC	Social / family stories; >60% geo-local audience.
Aware of the scenario	Show “this place is for me”	Meta local, content, Maps discovery	Meta runs, message is product-first	Rewrite creatives around meet-up / family.
Choosing a venue	Remove risk and friction	Google Search, GBP, reviews, website	Google works; GBP under-managed	Scale intent; photos / reviews / menu.
First visit	Capture an identifier + segment	POS / QR / receipt	No stable capture	Consent + JTBD + source tag.
Second visit	Create a concrete reason	7-day SMS, return offer	None	BUILD
Days 30–90	Prevent silent churn	Reactivation, seasonal, occasions	Almost none	BUILD
Loyalty	Referral + a favourite routine	Referral / CRM / staff recognition	Word-of-mouth exists, unmanaged	Formalize referral + personalisation.

6.2 Current channel economics

CHANNEL	SPEND / MO	NEW / MO	CAC	90D ROMI	VERDICT
Google Search	$1,100	95	$11.58	185%	SCALE / fix
Meta local	$900	48	$18.75	76%	FIX
Boosted posts	$800	12	$66.67	-50%	STOP
Flyers	$500	15	$33.33	-1%	STOP
Creator / UGC	$300	20	$15.00	120%	Keep / test
Google Business Profile	$0	~150 organic	~$0	very high	SCALE
CRM / SMS	~$0	barely used		–	BUILD

THE MAIN HOLE IN THE MEDIA MIX

$1,300 of $3,600 (31%) goes to boosted posts and flyers – channels with CAC of $33–67 and ROMI at or below zero. Meanwhile the two cheapest sources of ready demand and repeat visits – Google Business Profile and CRM – are effectively unmanaged.

6.3 The new media mix: the budget does not grow

CHANNEL	NEW SPEND	RESULT	CAC / CPA	ROMI	WHAT CHANGES
Google Search	$1,100	120 new	$9.17	260%	High-intent + brand / non-brand split; occasion and local queries.
Meta local / social	$700	65 new	$10.77	206%	Creatives about meet-up / family; geo-only.
Referral	$450	55 new	$8.18	303%	Incentive paid only after the invitee's purchase.
GBP + local SEO	$650	70 new	$9.29	255%	Reviews, photos, menu, weekly posts, local pages.
Creator / UGC	$300	20 new	$15.00	120%	Only local creators with geo-relevant audiences.
CRM reactivation	$400	60 returns	$6.67	260%	Lapsed 30/60/90 + seasonal / occasion triggers.
Total	**$3,600**	**330 new + 60 returns**	**–**	**~243% blended**	**Same spend, reallocated.**

Steady-state at the same $3.6k spend: +$2.4–3.0k revenue/mo and +$1.0–1.3k GP/mo. The point is not buying more impressions – it is paying only where the person is close to a purchase or has already been a customer.

6.4 The retention engine: the second visit is designed, not left to memory

90-DAY REPEAT	FREQUENCY	TIME TO 2ND VISIT	REVENUE LTV
30–32%	2.60–2.65×	<14 days	+13–18%
target · from 24% today	visits / month · from 2.46×	target	at the same CAC

The retention engine, moment by moment – each step exists to manufacture the next visit:

MOMENT	COMMUNICATION	KPI
[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]
[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]
[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]

IN THE CLIENT VERSION

6.5 Stop-loss and scale rules per instrument

INSTRUMENT	STOP IF	SCALE IF
[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]
[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]
[redacted]	[redacted]	[redacted]

IN THE CLIENT VERSION

> WHY THIS SECTION MATTERS MORE THAN ANY SINGLE CHANNEL
>
> Every acquisition dollar is amplified or wasted by what happens after the first visit. Moving the 90-day repeat rate from 24% to 30–32% raises the value of **every** channel in the mix at once – which is why the retention engine is built before the winning channels are scaled.

SECTION 07

DIGITAL JOURNEY: WEBSITE, INSTAGRAM, GBP

7.1 What the customer needs to see in each channel

TOUCHPOINT	CUSTOMER'S QUESTION	WHAT MUST BE THERE	TODAY	THE GAP
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	IN THE CLIENT VERSION	[illegible]	[illegible]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

The digital presence, before and after

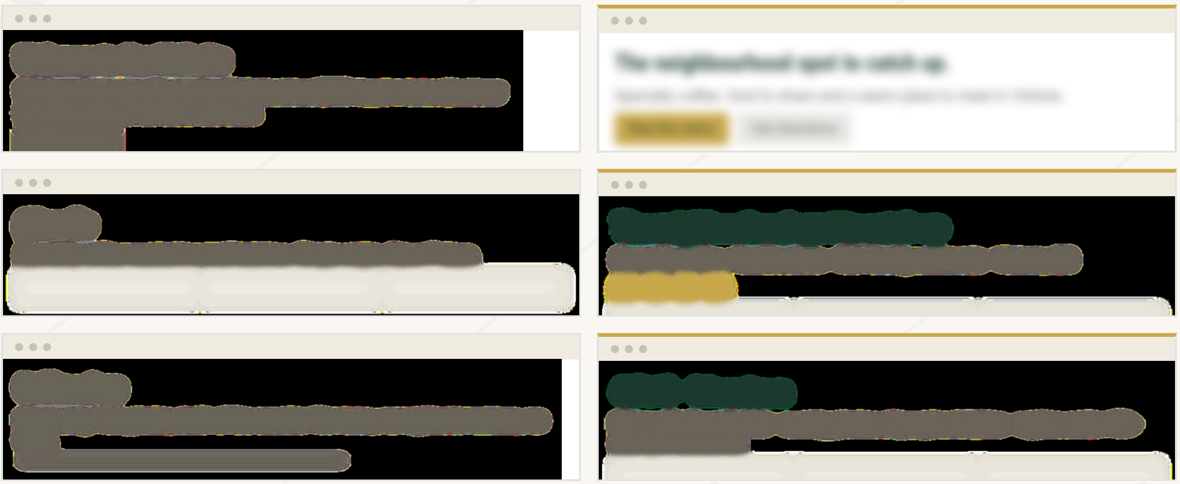
BEFORE · TODAY

AFTER · REBUILT

Website

Social media

Google Maps



Wireframes of the current presence against the rebuilt one, drawn per channel. The exact copy, blocks and settings behind the right-hand column are specified in 7.2–7.4 and delivered in the client version.

7.2 The website: a new first screen and structure

ELEMENT	RECOMMENDED TEXT / BLOCK	WHY
[redacted]	[redacted]	[redacted]

IN THE CLIENT VERSION

7.3 Instagram: from coffee content to local demand

NEW BIO

The neighbourhood spot to catch up
Specialty coffee + food to share
Kid-friendly weekends · Victoria, BC
Link: menu · hours · directions

CONTENT PILLAR	SHARE	KPI
[redacted]	[redacted]	[redacted]

IN THE CLIENT VERSION

Highlights: MENU · MEET HERE · FAMILY · SEASONAL · REVIEWS · FIND US

7.4 Google Business Profile: the cheapest high-intent channel, run as an asset

ELEMENT	ACTION
[redacted]	[redacted]

IN THE CLIENT VERSION

SECTION 08

PRIORITIES & THE 90-DAY PLAN

8.1 The initiative portfolio: what to do first

P	INITIATIVE	COST	TIME	GP / MO	CONF.	OWNER	LEAD KPI
[redacted]							

IN THE CLIENT VERSION

8.2 The roadmap: four phases

DAYS 1–14

CONTROL

Happy Hour, boosted posts and flyers off. Tracking live: source / JTBD / promo tags. Baseline dashboard.

+$1.2–1.5k

GP / MO · COST $0–400

DAYS 15–30

MONETIZE

C-menu trimmed. Food visibility, pair bundle, upsell script. Hero copy on website / GBP.

+$1.0–1.5k

GP / MO · COST $300–1,100

DAYS 31–60

RETAIN

Consent capture. 7-day return, reactivation, family layer, referral pilot.

+$0.8–1.3k

GP / MO · COST $350–1,000

DAYS 61–90

SCALE

Scale Search / Meta winners, local SEO, UGC, price tests. Stop-loss on weak experiments.

Remaining target

BUDGET-NEUTRAL

8.3 Checkpoints: what must be true at each gate

CHECKPOINT	LEADING KPI	DECISION
Day 14	100% of promo and media spend has tracking + break-even logic	No “unknown” spending; Happy Hour off.
Day 30	Food attach +6–8 pts; C-menu trimmed; pair bundle live	GP per transaction is rising.
Day 60	2nd visit +4 pts; reactivation and referral GP-positive	Retention works independently of acquisition.
Day 90	90-day repeat moving to 30–32%; GP LTV:CAC ≥3:1 in scale channels	Budget may grow – only into winners.

8.4 The 90-day target dashboard

KPI	TODAY	90-DAY TARGET	Δ	HOW IT IS COUNTED
Revenue / mo	$63.6k	$73.8–76.3k	+16–20%	Clients × frequency × ticket
Gross profit / mo	$40.8k	$47.5–49.2k	+$6.7–8.4k	Revenue × GM
Gross margin	64.1%	65–66%	+0.9–1.9 pts	Menu / pricing / promo
Avg ticket	$10.98	$11.55–11.75	+5–7%	Food attach + upsell
Frequency	2.46×	2.60–2.65×	+6–8%	Retention engine
90-day repeat	24%	30–32%	+6–8 pts	Cohort
Food attach	62%	70–74%	+8–12 pts	POS basket
Paid CAC	$18.95	$9–12	-37–52%	New customers only
Managed ROMI	~74% blended	220–245%	~3× quality	GP-based
Marketing spend	$3.6k	$3.6k	0%	Reallocation only

THE 90-DAY BUSINESS EFFECT

From a $63.6k/month base to a conservative steady state of **$73.8–76.3k revenue/month at the same marketing budget**. Gross profit: +$6.7–8.4k/month. The key risk is not the ideas – it is execution discipline, tracking, and the weekly closing of weak hypotheses.

The final decision map

DECISION	WHAT FALLS UNDER IT	BUSINESS RESULT
STOP	Happy Hour −20%; boosted posts; generic flyers; Breakfast Tea; Salad Bowl; the unsystematic free donut	Margin and focus returned.
FIX	First-order offer; Meta message; slow-prep food; the current website / Instagram / GBP; Matcha and pour-over pricing	The economics become manageable.
BUILD	Pair bundle; family layer; 7-day return; reactivation; referral; POS tags; CRM cohort dashboard	Ticket + frequency + LTV growth.
SCALE	Google Search; GBP / reviews; food heroes; social / family creative; local UGC	More high-fit demand at the same spend.

THE FINAL BEARING

In 90 days this business should earn more not because “there is more advertising”, but because every element of the model got stronger: a more valuable customer enters the base, each visit monetizes better, the customer returns sooner – and every marketing dollar goes where its gross profit can be measured.

SECTION 09

APPENDIX: CALCULATION LOGIC & CONTROL

9.1 The formulas behind the decisions

METRIC	FORMULA & USE
Revenue	Active customers × frequency × avg ticket – shows which multiplier growth comes from.
Gross profit	Revenue × gross margin – the deciding metric for menu, promo and channel calls.
Revenue LTV	Avg ticket × frequency × active life – compares segment value.
CAC	Marketing spend / new customers – kept separate from reactivation.
GP LTV : CAC	Gross-profit LTV / CAC – the scale gate; target ≥3:1.
ROMI	(Attributed GP − spend) / spend – always on GP, never on revenue.
Promo incremental GP	Incremental GP − cannibalized GP − incentive and media cost – the only number that decides stop / fix / scale.
Break-even discount volume	Baseline GP / GP per discounted order – the volume a discount must clear to not destroy GP.

9.2 The fields POS / CRM must collect

OBJECT	MINIMUM FIELDS
Transaction	id, timestamp, SKU, qty, gross revenue, discount code, net revenue, COGS / GP
Customer	id / consent, first visit, last visit, JTBD tag, family / social flag
Source	Google / Meta / GBP / referral / UGC / walk-in / unknown
Campaign	UTM / promo code / campaign id
Visit context	takeaway / work / social / family
Review	date, rating, theme, response time

9.3 The weekly operating rhythm – 75 minutes

TIME	WHAT IS REVIEWED – WHAT IS DECIDED
15 min	Revenue / GP / transactions / ticket / food attach – is the whole model moving.
15 min	Repeat / 2nd visit / reactivation / referral – is retention working.
15 min	CAC / ROMI / GP LTV:CAC by channel – what to switch off, what to scale.
10 min	Promo incremental GP – no promotion runs without its economics.
10 min	Top 10 / tail 10 SKUs – menu, waste, availability.
10 min	Experiment log: hypothesis, KPI, result, decision. Close tests, don't hoard ideas.

NOTE ON THIS SAMPLE

This document shows the complete format of a Clariva Growth Audit. The business is illustrative, competitors are described by role, and all figures are illustrative – in a client engagement every number is computed from the client's own POS, CRM and channel data, and validated at the Day-90 results check.

CLARIVA · GROWTH PRACTICE · WHAT HAPPENS NEXT

THE NEXT 90 DAYS, WITH US IN THE ROOM

A plan is worth what gets executed from it. The roadmap in section 08 is sequenced, budgeted and owned – but the businesses that hit the target are the ones that keep score weekly, kill the weak experiments on time and adjust as the data arrives. That is what Growth Advisory is for.

GROWTH ADVISORY · CA$2,490 / MONTH

CMO-level oversight

We oversee your team's execution of the roadmap: the weekly rhythm from section 09, the dashboard from 8.4, stop / scale calls made on time, and every initiative reported against the gross profit it was supposed to produce. Available only after a Growth Audit; month to month, leave at the end of any month.

WHAT YOU GET EVERY MONTH

Control

A monthly report against the audit's own KPIs – not vanity metrics. Checkpoints at day 14, 30, 60 and 90, each with the decision it forces. Experiments closed, not hoarded.

WHAT YOU GET ALONG THE WAY

New insight

Three months of fresh data answers questions this audit could only model. We bring what the numbers reveal as they arrive – the next opportunity, not a repeat of this one.

THE ENGAGEMENT	
Cadence	Weekly 75-minute review (section 9.3) · monthly written report · day-14 / 30 / 60 / 90 checkpoints
Decisions	Channel scale and stop-loss rules (6.5), promo economics before launch (5.5), menu and pricing tests (4.7)
Terms	CA$2,490 / month · available exclusively after a Growth Audit · month to month · leave at the end of any month
Strategist	Daria – marketing strategist, 12+ years, from local businesses to global brands. Clariva's growth practice lead.
Contact	info@clarivagroups.ca · clarivagroups.ca

THE DAY-90 CHECK IS FREE EITHER WAY

Whether or not you continue with us, we come back at day 90 and measure the actuals against this plan – in writing. A plan nobody checks is a document; a plan that gets checked is a decision. That check is included in the audit you already have.

NOTE ON THIS SAMPLE

An anonymized demonstration document: a representative business built end-to-end to show the depth and format of a Clariva Growth Audit. Decision tables are masked in this public copy. The business, its competitors and all figures are illustrative; your report is built the same way – from your own numbers.