

Poki Yoki — The Next 90 Days, Down Two

Paths

PATH B Classic DTC sales vs **PATH A** Game-first free model. Week-by-week projected numbers, a reality-checked verdict, and the one decision to make on Day 1.

v1 · 2026-06-13 · budget anchor: \$15,000 media / 90 days (~\$5K/mo) · figures reality-checked by an adversarial CFO pass · for marketing/ad review

How to read this. §1 is the verdict + the 5 numbers for the wall. §2 shows the two 90-day curves side by side (the shapes are the whole story). §3 is the reality-checked scorecard. §4 is the unit-economics fix that changes everything. §5 is cash & survival. §6 is the budget-sensitivity (it matters a lot). §7 is the recommended plan. §8 is the three things you must measure. §9 is the precedent that should give everyone pause. **The team's first projections were optimistic; every number here is the corrected, conservative version.**

Contents

1. The verdict & 5 numbers for the wall
2. The two 90-day curves (week by week)
3. Reality-checked 90-day scorecard
4. The unit-economics fix: lead with Family
5. Cash flow & survival
6. Budget sensitivity (\$7.5K / \$15K / \$30K)
7. The recommended 90-day plan
8. The 3 things you must measure (kill-switches)
9. The precedent that should give everyone pause
10. Sources

1 The verdict & 5 numbers for the wall

Path B makes more cash. Path A builds a more valuable asset. Neither is profitable in 90 days.

At a \$15K media budget, **neither path produces positive contribution-after-CAC in 90 days** — that's the honest headline. Both are investments in proving channel economics and building an audience. **Path B (classic DTC) wins on cash in every scenario** (it generates revenue from Week 1); **Path A (game-first) builds a bigger long-term list asset** but burns far more cash to do it and converts almost nothing inside 90 days. The right move is **not "pick one"** — it's Path B as the revenue engine, restructured around the Family SKU, with a small, stage-gated Path A test.

Five numbers to put on the wall

#	THE NUMBER	WHY IT MATTERS
1	Path B ≈ 270 orders vs Path A ≈ 44 orders in 90 days (at \$15K)	A 6x gap. Path A's rosier "234-order" draft contained a 7.5x math error between list size and per-week funnel; 44 is the reconciled figure.
2	Path B ≈ \$10,600 cash vs Path A ≈ \$5,500 cash at Day 90	The \$5,100 gap = 1–2 months of extra runway for a company starting at ~\$19.7K cash with \$3–5K/mo burn.
3	Starter (\$45) is first-order unprofitable above ~\$22 CAC; Family (\$85) is profitable below ~\$43 CAC	The single most important unit-economic fact. Every Day-1 decision should be judged through it.
4	Corrected base CAC ≈ \$55 vs breakeven \$22 (Starter) / \$43 (Family)	You need a ~30% CAC cut <i>or</i> a ~30% AOV lift. The AOV lift is available on Day 1: lead with Family.
5	Neither path is profitable at Day 90	The real question isn't "which makes money in 90 days" (neither) — it's "which best positions Month 4–12 given the cash constraint." Answer: Path B + a small Path A slice.

2 The two 90-day curves (week by week)

The endpoints matter less than the **shapes**. Path B earns from Week 1 and ramps as the pixel learns and retargeting kicks in. Path A earns almost nothing for 4–6 weeks (it's building a list), then accelerates — but never catches up inside the window.

PATH B Classic DTC — cumulative, corrected base (\$15K)

BY END OF...	SPEND (CUM)	ORDERS (CUM)	REVENUE (CUM)	CONTRIBUTION CM2	CASH ON HAND	PHASE
Week 2	\$2,100	~28	\$1,290	\$620	\$18,185	Learning phase, CPM penalty
Week 4	\$4,200	~70	\$3,220	\$1,540	\$17,005	Exits learning ~now
Week 6	\$6,300	~120	\$5,520	\$2,640	\$16,005	Creative iteration
Week 8	\$8,400	~170	\$7,820	\$3,740	\$15,005	Retargeting warms
Week 10	\$10,500	~220	\$10,120	\$4,840	\$14,005	Family-SKU weeks turn CM3+

Week 12 (Day 90)	\$15,000	~270	\$12,420	\$5,940	~\$10,600	0.83x ROAS · \$55 CAC
-------------------------	----------	------	----------	---------	-----------	-----------------------

PATH A Game-first — cumulative, corrected base (\$15K)

BY END OF...	SPEND (CUM)	CUP ORDERS (CUM)	REVENUE (CUM)	VERIFIED MOMS ON LIST	CASH ON HAND	PHASE
Week 2	\$1,400	0–1	~\$50	~140	\$18,300	Infra + first plays; \$0 sales
Week 4	\$3,800	~3	~\$150	~280	\$15,950	First trickle (welcome flow)
Week 6	\$6,600	~9	~\$450	~520	\$13,500	List building, retargeting on
Week 8	\$9,400	~18	~\$900	~780	\$11,150	"Your Poki needs a real cup"
Week 10	\$12,000	~30	~\$1,500	~1,040	\$8,400	Hard push + promo code
Week 12 (Day 90)	\$15,000	~44	\$2,200	~1,270	~\$5,500	0.15x ROAS · \$341 CAC

The crossover: Path A never catches Path B inside 90 days

Path A's contribution accelerates in Weeks 9–12 as the list matures, but it can't close the deficit built in Weeks 1–8 when Path B was producing **2–6x more buyers per dollar**. The two only cross *beyond* the window — and only if Path A's email list is genuinely large and converting (the optimistic case). With the corrected ~1,270-mom list, Path A's 12-month follow-on revenue is **~\$8K/yr**, not the \$180K the first draft implied.

3 Reality-checked 90-day scorecard

Low / base / high bands at \$15K, after the adversarial pass (CVR ceilings lowered, repeat rate halved to ~6%, AOV adjusted for launch skew, Path A list-size reconciled).

PATH B Classic DTC

METRIC	WORSE	BASE	BETTER
--------	-------	------	--------

Effective AOV (after discounts)	\$42	\$46	\$52
Peak CVR (Week 12)	1.4%	1.8%	2.5%
Total orders (incl. ~6% repeat)	175	270	413
Gross revenue	\$7,350	\$12,420	\$21,476
Blended ROAS	0.49x	0.83x	1.43x
Blended CAC	\$86	\$55	\$36
CM3 (contribution – media)	-\$11,500	-\$9,060	-\$5,088
Cash at Day 90	~\$8,200	~\$10,600	~\$14,600
Email list built	~350	~540	~825

PATH A Game-first

METRIC	WORSE	BASE	BETTER
Viral coefficient (k)	0.10	0.30	0.45
Kid-contamination multiplier	2.5x	2.0x	1.7x
Verified moms on list (Day 90)	600	1,270	2,100
90-day list → buyer conversion	1.5%	3.5%	6.0%
Cup orders (cohort model)	9	44	126
Gross revenue (~\$50 AOV)	\$450	\$2,200	\$6,300
Blended ROAS	0.03x	0.15x	0.42x
Blended CAC	\$1,667	\$341	\$119
CM3 (contribution – media)	-\$14,820	-\$14,120	-\$12,480
Cash at Day 90	~\$4,800	~\$5,500	~\$7,200

4 The unit-economics fix that changes everything: lead with Family

Starter \$45 → CM2 ≈ \$22 → unprofitable above ~\$22 CAC Family \$85 → CM2 ≈ \$43 → profitable below ~\$43 CAC ← lead with this

The path to profitability is **not** better CVR, lower CPM, or faster learning — those take weeks. It's **higher AOV through Family-SKU emphasis**, which is in your control on Day 1. If Family mix rises

from ~30% to ~45–50% of orders, blended CM2 climbs from ~\$22.57 to ~\$31–33, CM3 per order improves by ~\$10, and the path to first-order profitability shortens from **Week 9–10 to Week 5–6**.

⚠ Operational tension to resolve first

The "lead with Family" play is the single highest-leverage lever — **but Family inventory is reportedly down to ~5–6 units (May 2026 data)**. Leading with Family requires a Family restock first, or the strategy stalls on availability. Confirm Family stock before building the campaign around it. (Also worth noting: actual paid ROAS to date is ~0.2x on a small sample — which is *why* the corrected base uses 0.83x, not the 2.17x category median.)

5 Cash flow & survival — the real constraint

~\$19.7K

starting cash (Feb 2026) ·
~4–6 months runway at \$3–
5K/mo burn

-\$1.5K

Path B max contribution
trough (Week 9), then
recovers

-\$15–21K

Path A trough at Day 90 —
never recovers in-window

For a founder-funded company (\$25K deferred salary owed, a second production run to finance), **cash timing is decisive**. Path B generates revenue from Day 1 and consumes ~14% of the **3,443-unit inventory** (489 units in the higher-spend cash model) — healthy sell-through that funds Amazon/retail next. Path A converts almost no inventory (~38 units / 1.1%) while spending the same media plus game/COPPA overhead — it depletes cash with little to show inside 90 days. **The ability to earn in Week 1 vs. Week 6 is the difference between surviving to Day 180 and not.**

6 Budget sensitivity — it changes the answer

BUDGET / 90 DAYS	PATH B	PATH A	READ
\$7,500	110–140 orders; stuck in perpetual learning phase (under the ~\$1,050/wk/ad-set minimum to exit)	Don't run it — never builds list mass; ~20 orders, ~\$1K	Below min viable. Redirect to influencer seeding + Amazon.
\$15,000	270 orders, \$12.4K, ~\$10.6K cash	44 orders, \$2.2K, ~\$5.5K cash	A 60/40 split here is the worst of both — neither gets enough.

\$30,000	550–700 orders, \$25–32K rev, ~2.0x ROAS ; weekly CM3-positive ~Week 7–8	~85–100 orders, ~\$4.4–5.2K; list worth ~\$18–22K/yr	The threshold where Path B is genuinely <i>viable</i> and a hybrid makes real sense.
----------	--	--	--

Implication: at \$15K, don't dilute — concentrate on the proven path and run Path A as a small bounded test. The hybrid logic gets stronger as budget rises toward \$30K.

7 The recommended 90-day plan

★ Run Path B restructured around Family; run Path A as a \$2,500 stage-gated test

Follow the proven 70/20/10 split: **~70% to the proven channel, ~20% to the emerging game channel, ~10% to creative/influencer tests.** Path B is the revenue engine and control arm (continuous). Path A is a bounded experiment that must **prove verified-mom → buyer conversion before earning more budget** — it cannot be the majority allocation with ~\$19.7K cash and 3,443 units to protect.

\$15,000 / 90-day allocation

BUCKET	\$	%	PURPOSE
B Meta paid social (Mawn)	\$9,000	60%	Revenue engine · 2 ad sets max · Family as hero
B Creative production (UGC/static/video)	\$1,500	10%	10–15 assets/mo to feed the algorithm
B Influencer seeding (mom micro-creators)	\$1,500	10%	30–50 gifted units; amplify winners as dark posts
A Game traffic (TikTok/Meta) + promo	\$2,250	15%	Build ~400–500 verified moms + a ~1,500 retargeting pool
Buffer / holdout-test cost	\$750	5%	CPA rescue, clean holdout, pivots

Stage-gates: run to the thresholds, not the calendar

- **Day 30** — The <\$5K proof-of-conversion sprint (Weeks 1–4) reports. **A** gate: is the contamination rate acceptable and is anyone converting? **B** gate: has Meta exited learning, and is Family ≥25% of orders?
- **Day 60** — Scale what's working. If Path B CAC is trending to <\$40 on a Family-led mix, increase budget 20–30%. If Path A conversion is invisible, reallocate its budget to B.

- **Day 90** — Decision: does Path A's verified-mom→buyer rate justify a Month-4 scale, or is it a brand/retention asset to keep but not fund as acquisition?

8 The 3 things you must measure (set kill-switches before Day 1)

- **1. Kid-contamination rate.** Post-signup survey, one question: "How old is your youngest child?" If >40% have no kids or kids over 6 by Week 2 → the Path A CPL model is broken; stop the Path A spend.
- **2. Family-SKU landing CVR.** The entire unit-economics fix rests on Family hitting ~45–50% of orders. If Family is below 25% of orders by Week 2 → rebuild the landing-page architecture before Week 3 spend.
- **3. The game's k-factor.** Track share events. If organic signups are <10% of paid signups by Day 14 ($k < 0.1$) → the viral assumption is wrong; shift Path A's budget to Path B.

9 The precedent that should give everyone pause

Every proven "game sells product" case is PAY-FIRST, play-second — not play-free, pay-later

Webkinz (the canonical case, ~\$100M/yr at peak) sold the plush *first*; the game unlocked *after* purchase and drove *repeat* plush buys. When Ganz tried the inverse in 2009 (memberships without a toy purchase), growth **stopped**. **McDonald's Monopoly** (>\$2B incremental/decade) is the same shape: buy → receive game pieces → return to buy more — it accelerates *existing* buyers, it doesn't manufacture cold ones. **KFC's "Shrimp Attack"** (+106% sales) worked because the game dispensed an *expiring discount* redeemable at point of sale. **The historical record is clear: branded games reliably drive repeat and deepening purchases; there is no proven case of a free game generating cold top-of-funnel buyers for a physical product at a profit.** Poki Yoki's Path A would be attempting something the precedent does not support — which is exactly why it must be a measured test, not a launch strategy.

This doesn't kill the game funnel — it **repositions** it. The Arcade's proven role is **retention, repeat purchase, brand love, and a warm retargeting pool** (the Webkinz/Monopoly job), not cold acquisition. That's a valuable asset worth keeping and feeding — just not the channel to bet the launch budget on.

10 Sources

Benchmarks: Triple Whale 2025 (baby Meta CPA \$30.04, CPM \$10.92, CTR 1.91%, CVR 1.85%, ROAS 2.17x) · MHI Growth Engine 2026 (DTC CVR, Meta-vs-TikTok, learning phase) · Varos 2025 (baby Google CPC/CPA) · Lebesgue

/ AdStellar 2026 (Meta learning-phase 50-event threshold, post-learning CAC) · Trendtrack 2025 (creative-iteration CAC reduction) · Klaviyo 2025 (welcome/abandoned-cart, sweepstakes-list conversion) · GoBolt 2025 / Top Growth Marketing (shipping + 3PL costs) · Rijoy 2026 (baby/toddler DTC bounce/loyalty) · Sensor Tower "Parents Wrapped" 2025 (parent-impression share). Precedent: Webkinz (Wikipedia / VirtualPetList / David Kushner) · McDonald's Monopoly (Restaurant Business Online / eventXgames / Chief Marketer) · KFC "Shrimp Attack" (Bazaarvoice). Repo: [company/financials.md](#) · [marketing/key-numbers.md](#) · [brand/positioning.md](#) · [pokiyoki-dashboards-overstate-dtc](#) (actual paid ROAS ~0.2x) · GTM cockpit spec (Mawn \$3K/mo from June 15). Method: 7-analyst research swarm (2023–2026 sources) + an adversarial CFO reality-check that corrected the team's first projections (Path A list-size reconciled, CVR/repeat/AOV adjusted down). Figures are decision-grade estimates; the load-bearing unknown — the 90-day verified-mom→buyer rate — is unmeasured until the §7/§8 sprint runs.

Poki Yoki · The Next 90 Days, Two Paths · for marketing/ad-professional review · the honest read: neither path is profitable in 90 days — Path B preserves cash and builds social proof; Path A is a measured bet on a long-term asset. Run B around Family; test A to a kill-switch.