

BREAKOUT SESSION - ROUND 1

BREAKOUT 1: PromoStandards Best Practices

Dunes Ballroom (Main Room)



Ajay Kaul
IT Operations Leader
SanMar

BREAKOUT 2: Volunteering with PromoStandards

Sandpiper Room (here!)



Jessica Shonebarger
Executive Director
PromoStandards

BREAKOUT SESSION - ROUND 1

BREAKOUT 2: Volunteering with PromoStandards Sandpiper Room



Jessica Shonebarger
Executive Director
PromoStandards

PANELISTS:



Mike Knapick
Co-founder & CIO
SanMar



Amy Rabideau
VP of Client & Community
Engagement
Antera Software

BREAKOUT SESSION - ROUND 2

BREAKOUT 1: Standards Committee - New Standards

Dunes Ballroom (Main Room)



Erica Griffitt
Senior Software Engineer
Staples Promo

BREAKOUT 2: Introduction to PromoStandards

Sandpiper Room (here!)



Steve Luisser
VP of Research
Essent

BREAKOUT SESSION - ROUND 2



BREAKOUT 2:
Introduction to
PromoStandards
Sandpiper Room



Steve Luisser
VP of Research
Essent

Introduction to PromoStandards





Presented by: Stephen Luisser

- Vice President of Research at Essent Corporation
- PromoStandards 2025 Service Provider Person of the Year
- PromoStandards Standards Committee Member
- PromoStandards Best Practices Committee Member



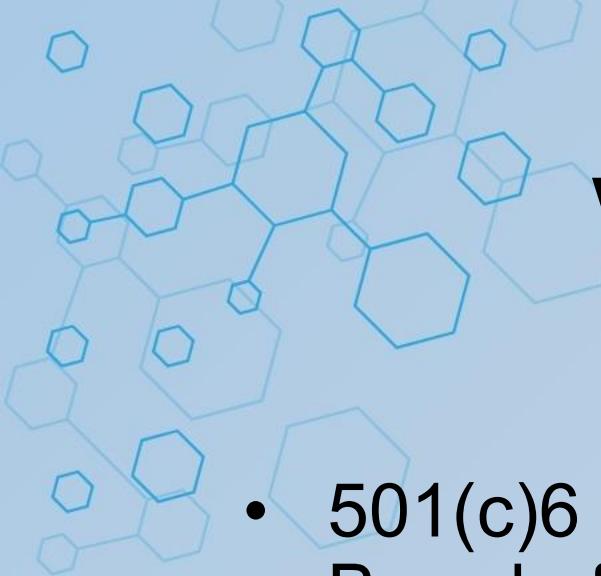
Show of Hands

- Business Type
 - Distributor
 - Supplier
 - Decorator
 - Service Provider
- Current knowledge of PromoStandards
 - None/just getting started
 - Basic
 - Intermediate
 - Expert



Listen, Learn, and Network

- The Tech Summit is the best place to learn about and get started with PromoStandards
- We are an open and welcoming community, so talk with everyone
 - Current and prospective business partners
 - Service providers
 - Even your competitors



What is PromoStandards?

- 501(c)6 non-profit organization
- Board of Directors comprised of technologically-minded suppliers, decorators, distributors and service providers
- Is a standards-based organization that develops and publishes specifications to meet different business needs.
 - Inventory, Product Data, Invoice, etc.
- Organized into committees to handle specific tasks (Executive, Standards, Best Practices, Decorators, membership, marketing and education, etc.)



Mission Statement

Our mission is to facilitate the development and adoption of open interoperability standards, guided by our values, that provide operational efficiencies to companies that process custom products.



Vision Statement

Our vision is to foster inclusive and open standards that provide tangible efficiencies for industry participants of all sizes and roles.



Value Statement

Our values are to collaborate openly and inclusively on the creation of industry-leading open standards to improve customer experiences, reduce transactional friction, and effectively execute digital strategies for industry participants.



Value Proposition

- Transformational way of conducting business between our supply chain
- The preferred systems integration method for the industry
- Has a large community
 - Over 400 suppliers with published endpoints
 - Over 1000 distributors consuming endpoints
 - Growing number of decorators are involved
 - Many service providers that can assist in all facets of integration
- Does not require paying a third party to maintain the “network”
- The only open and free standard in the industry



Benefits

- PromoStandards is designed to be point-to-point. You stay in control of your data and with your trading partners.
- You can compute an ROI
 - Data is at your fingertips, no need to call
 - How much inventory do you have of this item in red?
 - What is the status of my order?
 - Has it shipped yet? What are my tracking numbers?
- Less chance for errors
 - No need to rekey orders
 - Can automate importing of product catalogs



How to Get Involved

- Sign up for an account on promostandards.org
- We offer a different membership levels, so pick the one that best fits your needs
 - All membership levels gives you access to the published standards; even the free tier
- Recommend upgrading to a level that includes access to the PromoStandards community on Slack
 - Engage in the conversation
 - Get up to date information on standards, events, and more
 - Ask questions, and give feedback on the specifications

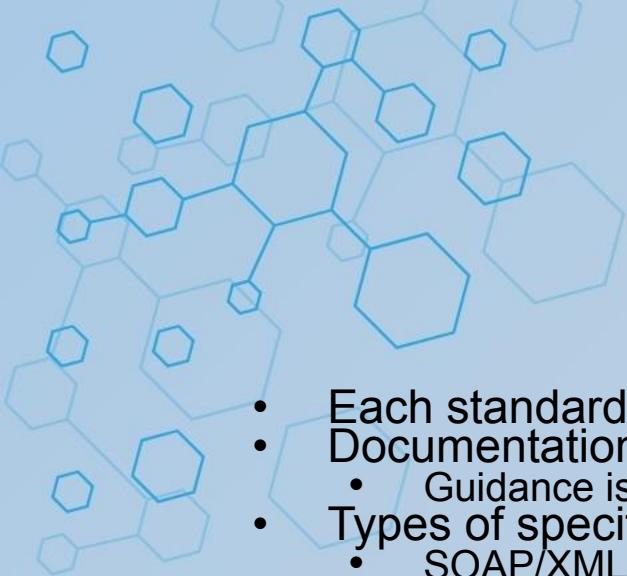
Membership Levels



PromoStandards

PromoStandards Membership Levels

| Membership Level | Advisory Member | Adopting Member | Associate Member | Non-Member |
|---|-----------------|-----------------|------------------|------------|
| Annual Fee | \$5,000 | \$2,500 | \$500 | |
| Membership Benefits | | | | |
| May Draft/Propose Standards | ✓ | | | |
| Vote to Ratify Standards | ✓ | | | |
| Vote to Amend Bylaws | ✓ | | | |
| Eligible for PromoStandards Board | ✓ | | | |
| Eligible for Committees/Work-groups | ✓ | ✓ | | |
| Access to PromoStandards Community on Slack | ✓ | ✓ | ✓ | |
| Number of Slack Users | 10 | 5 | 1 | 0 |
| Use of PromoStandards Logo | ✓ | ✓ | ✓ | |
| Updates on Standards | ✓ | ✓ | ✓ | |
| Access to Member & Non-Member Endpoints | ✓ | ✓ | ✓ | |
| Access to Membership Directory | ✓ | ✓ | ✓ | |
| Comment on Standards | ✓ | ✓ | ✓ | |
| Deploy Standards | ✓ | ✓ | ✓ | ✓ |
| Requires Signed End User License Agreement | ✓ | ✓ | ✓ | ✓ |
| Public Listing of Endpoints on PromoStandards.org | ✓ | ✓ | ✓ | |
| Public Listing Without Endpoint Details | | | | ✓ |



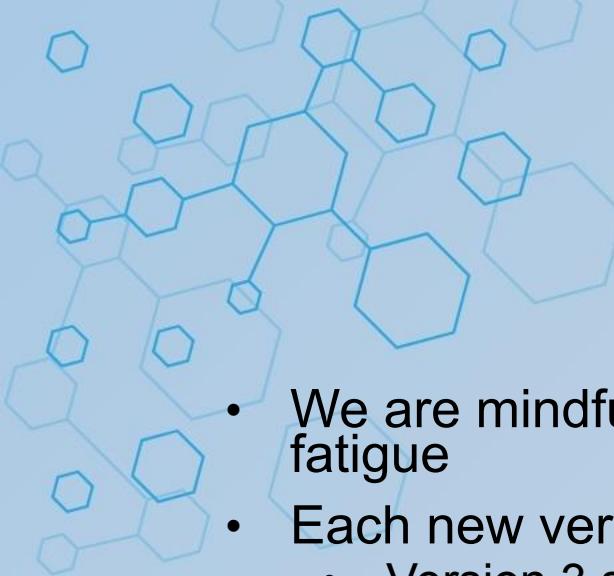
Technical Details

- Each standard defines a specification for a web service
- Documentation describes the methods and fields and includes some guidance
 - Guidance is augmented by the best practices committee
- Types of specifications
 - SOAP/XML
 - Uses in-band/application-level authentication (id, password)
 - Includes WSDL and related XSD files to enforce the data contract
 - REST/OpenAPI/JSON
 - Uses JSON Web token authentication (JWT)
 - Includes an OpenAPI specification document to enforce the data contract
 - Webhooks – coming soon
 - Consumer subscribes to updates for orders, shipments, etc.



Specifications

- *Company Data* – 1.0.0
- *Inventory* – 1.2.0, 2.0.0
- *Invoice* – 1.0.0
- *Media Content* – 1.1.0
- *Order Shipment Notification* – 1.0.0, 2.0.0, 2.1.0
- *Order Status* – 1.0.0, 2.0.0
- *Product Compliance* – 1.0.0
- *Product Data* – 1.0.0, 2.0.0, 3.0.0 (coming soon)
- *Product Pricing and Configuration (PPC)* – 1.0.0
- *Purchase Order* – 1.0.0
- *Remittance Advice* – 1.0.0
- *Webhooks* (coming soon)



Specification Lifecycle

- We are mindful about the number of revisions to the specifications to prevent upgrade fatigue
- Each new version includes additional data, fixes, and other improvements
 - Version 3 starts the migration from SOAP/XML to REST
- Production
 - Current specification, may include multiple versions of a specification
 - Look to support these
- Deprecated
 - Older versions of the specification
 - Create a plan to upgrade to a newer version
- Not supported (sunset)
 - Move to an updated version as soon as possible
 - Suppliers may keep these up, but for how long



How Does it work?

- Publisher implements and publishes a service endpoint for each standard they support
- Consumer requests and receives credentials to a Publishers PromoStandards services
 - Can be id/password or JWT based on the service
- Consumer submits a request to an endpoint and processes the results



Pull or Push

Pull Based

- The consumer requests what they are looking
- All but 3 services are fully pull based

Push Based

- The consumer submits data to the publisher
- Purchase Order – sends purchase orders
- Remittance Advice – how to apply payments
- OSN 2.1.0 – Send Advance Shipment Notification – send advanced notification of a drop shipment from a supplier to a third party most likely a decorator

Suggested Implementation Order

Phase 1 – easiest to start with, quick wins, great ROI

- Inventory, Order Status, Order Shipment

Phase 2

- Product Data, Media Content, Invoice

Phase 3

- Purchase Order, PPC

Phase 4

- Remittance Advice, Product Compliance



Implementation Steps

- Create a project plan for your PromoStandards implementation journey
 - Suggest starting with Phase 1
- Build in house, outsource, or combination of both?
 - The platform you use may already have support
 - Many Service Providers in the ecosystem
- Build your team
 - Executive, Project Management, Development, SME's, etc.
- Line up key customers, suppliers, and service providers to test with
- Inform and train your staff on PromoStandards

Implementation Steps (continued)

Create and implement a credentialing workflow that supports both the id/password and JWT.

For each specification

- Identify the version(s) to implement
- Download and review the specification
- Review the related best practices
- Review guides from key customers/suppliers
- Know the specification inside and out, ask for help as needed
- Ensure that a relevant internal SME is assigned
- Build then deploy for testing
- Publish for production and add the endpoint to the PS website
- Update staff of any updated processes



Working with Service Providers

There are many Service Providers that provide PromoStandards specific services

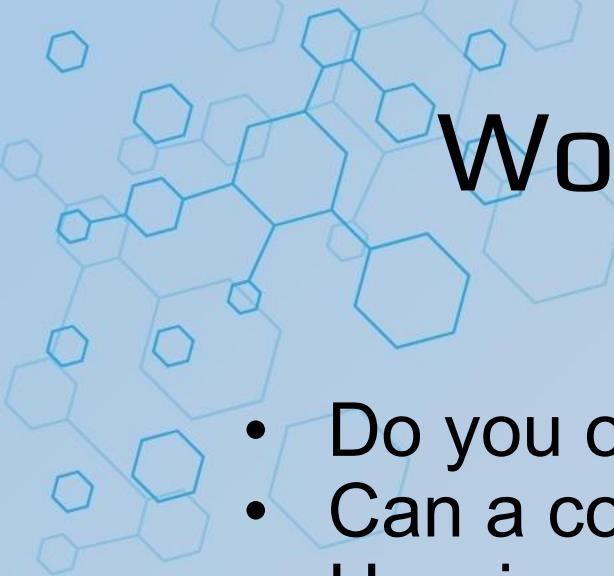
- Do they know promotional products
 - Can a random web developer build what you need
- Do they specialize in the systems you are using
- Levels of engagement
 - Will they do everything you need
 - How much effort on your side is required
- Takeaway – find a good fit



Working with Service Providers (continued)

Consuming Data from aggregators

- Which credentials are used; yours or the aggregator
 - Services not considered customer specific may contain customer specific data
- Is the source data being modified
 - Version upgrade, downgrade
- Verify what are you agreeing to
 - You irrevocably waive any and all moral rights you may have in the Content in our favor and agree that this waiver may be invoked by anyone who obtains rights in the Content through Our Services, including anyone to whom we may transfer or grant (including by way of license or sublicense) any rights in the Content.



Working with Service Providers - Publishers

- Do you own the relationship with your Trading Partners
- Can a competitor gain access your services
- How is your data shared with others
 - Is it used for price comparisons
- Is your source data being modified
 - Version upgrade, downgrade
 - Is there a specific data pipeline for each service version
- Do you have access to the usage of your services



Tips and Tricks

- Engage with the community
 - Tech Summit, Slack, Monthly Training sessions
- Become familiar with the specifications and reference the work published by the best practices committee
 - See the Resources menu on the PromoStandards website when logged in
- When there is a difference between the documentation and the contract, the contract wins
- Create an implementation strategy and get your SMEs involved
- Find an organization to work closely with to test data. This may be a service provider.



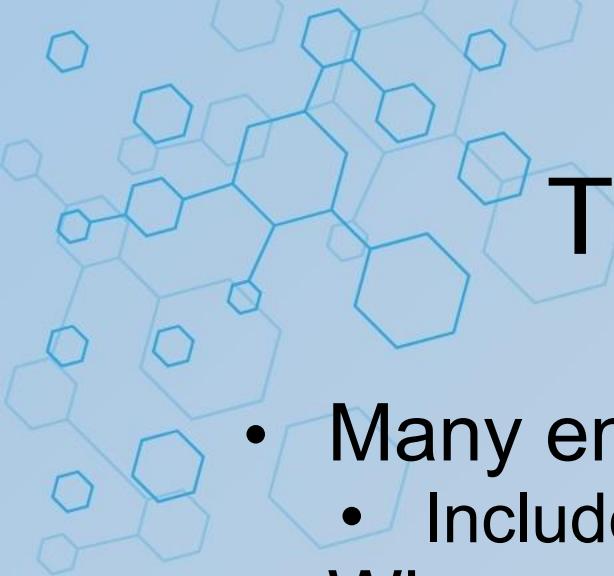
Tricks and Tips (continued)

- Products are organized by productId and partId
 - productId is the style or product family (Gildan 2000 T-Shirt)
 - partId is part number or sku that identifies an item (G2000-RED-XL)
- Some services support multiple part groups
 - Must specify multiple parts to order a product
 - A tumbler might have part groups for the tumbler, lid, and optional straw
- Think of scalability from day one
 - Before you know it, you will be processing millions of transactions a month
- Be prepared to change your internal processes
- You will need to cleanup your data!



Tricks and Tips (continued)

- Create an implementation guide
 - Mostly for publishers, some consumers have one
- There are many tools available to use for testing
 - PromoStandards Web Service Validator
 - SoapUI
 - Postman
- When using the Web Service Validator, look out for optional elements that are populated with a default value
- Some services support multiple part groups
 - Must specify multiple parts to order a product
 - A tumbler might have part groups for the tumbler, lid, and optional straw



Tricks and Tips - Consumers

- Many endpoints require a purchase order number
 - Include one for everything you order, including samples
- When you find inconsistencies or incorrect data, reach out to the publisher first before posting in a public slack channel
- Be mindful how often and how many calls you make
 - Do you really need order status every minute?
 - Some publishers implemented rate limiting
- Submit clean data to the push-based services



Tips and Tricks - Publishers

- Download and fill out the SAQ
- Your implementation guide should include an acceptable use policy
- Don't just hand out credentials to unknown organizations
 - What will they be using the data for
- Populate as many fields as you can to reduce the chance of rework
- Be mindful when caching data - updated frequently enough?
- Log requests, great for troubleshooting



Questions and Comments

BREAKOUT SESSION - ROUND 3

BREAKOUT 1:
AI Tools for Developers
Dunes Ballroom (Main Room)



Raul Rodriguez
CEO
Merch.ai

BREAKOUT 2:
RevOps & PromoStandards
Sandpiper Room (here!)



RJ Hagel
Founder
The Promo CMO



Mika Kayt
Founder & CEO
Outgagge

BREAKOUT SESSION - ROUND 3



BREAKOUT 2: RevOps & PromoStandards

Sandpiper Room



RJ Hagel
Founder
The Promo CMO



Mika Kayt
Founder & CEO
Outgag

REVOPS & LEADING THROUGH FRICTION: Why Leadership and Clarity Matter More Than Adding Headcount

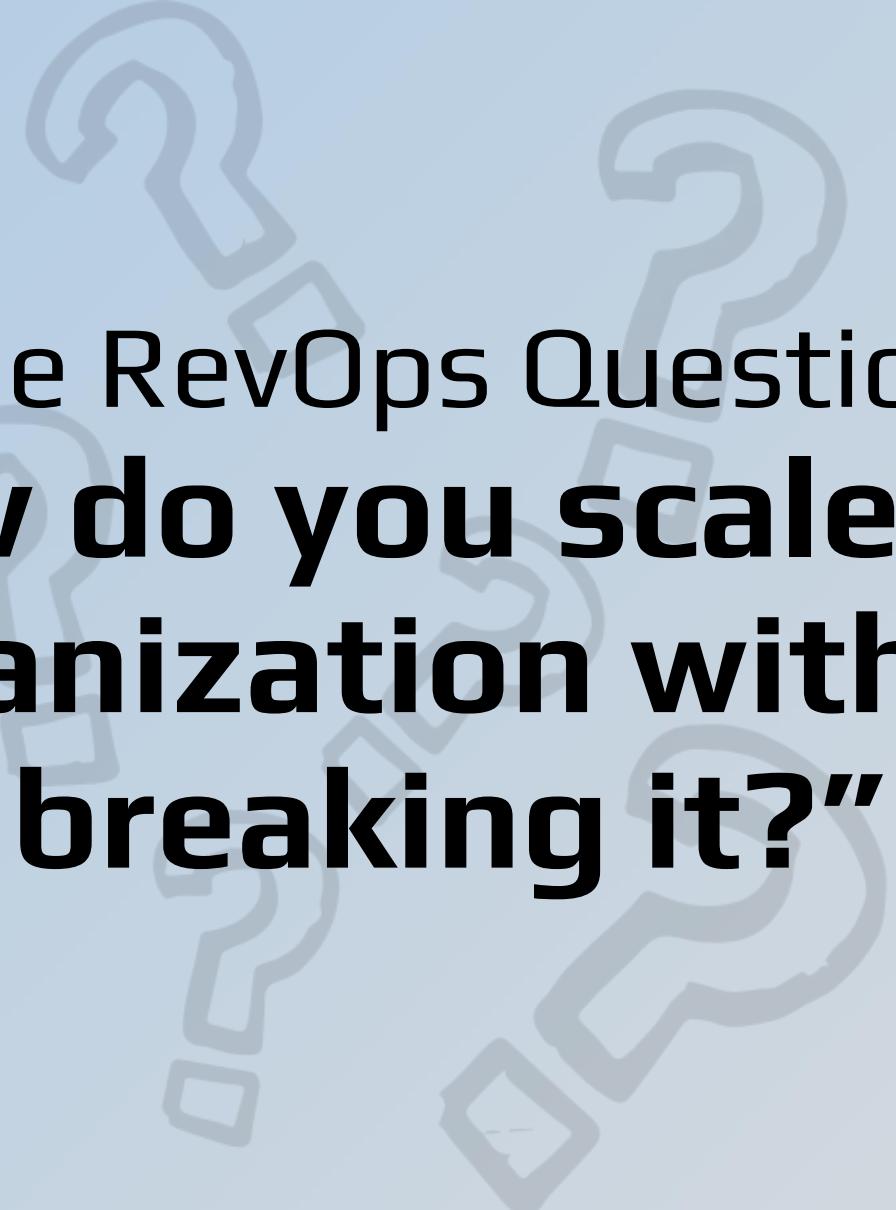




RJ Hagel
Principal Strategist
The Promo CMO



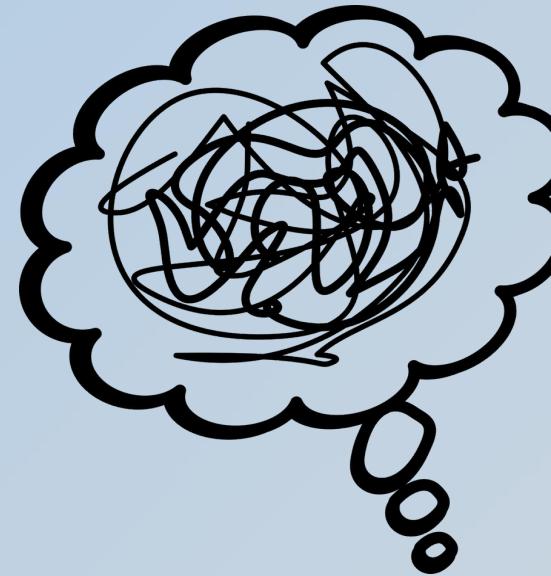
Mika Kayt
Founder & CEO
Outgage



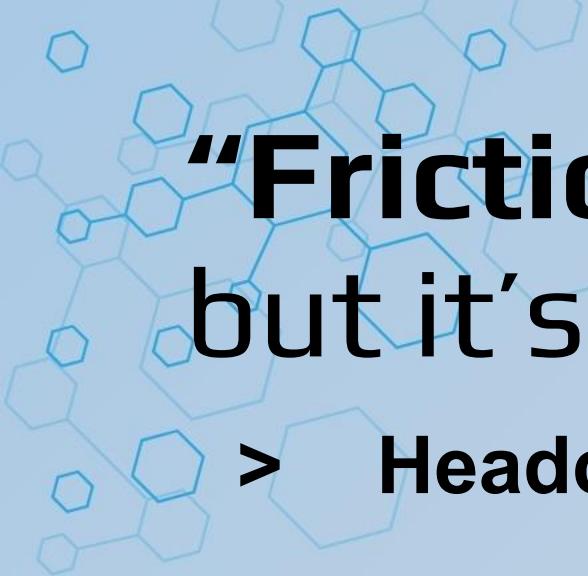
The RevOps Question: **“How do you scale your organization without breaking it?”**



“RevOps is how leaders align sales, marketing, and service through shared tech, data and accountability – enabling sustainable growth and a unified customer experience.”

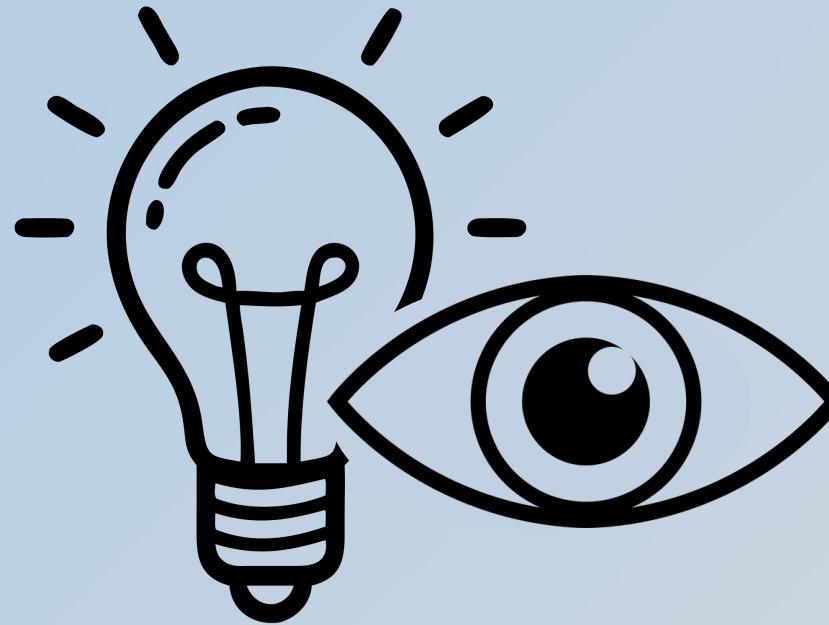


**“The Truth? Leadership is hard—
Change IS hard, and it’s happening fast.”**

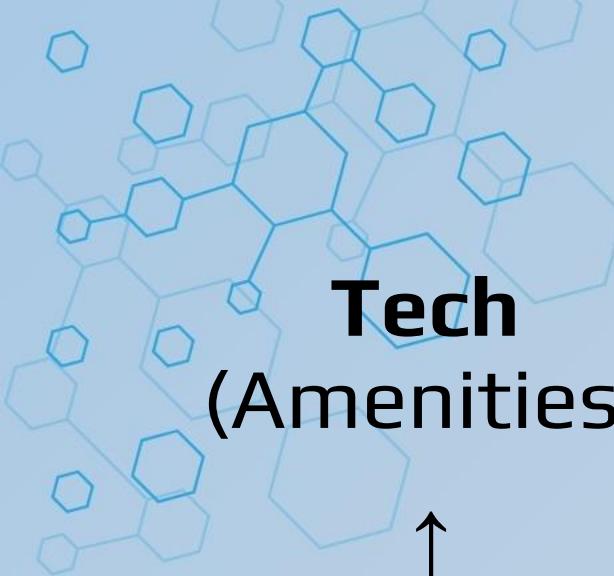


“Friction might feel like Failure—but it’s more likely Misalignment”

- **Headcount** is the first solution to growth
- **Technology** is treated as the answer, instead of a tool
- **Teams** aren’t clear on their role, impact or accountability
- **Data** doesn’t inspire trust or drive understanding
- **Goals** point teams in different directions
- **Implementation & Collaboration** stalls or fails to evolve



“Good leadership removes barriers and creates shared vision and clarity across teams, processes, and data.”



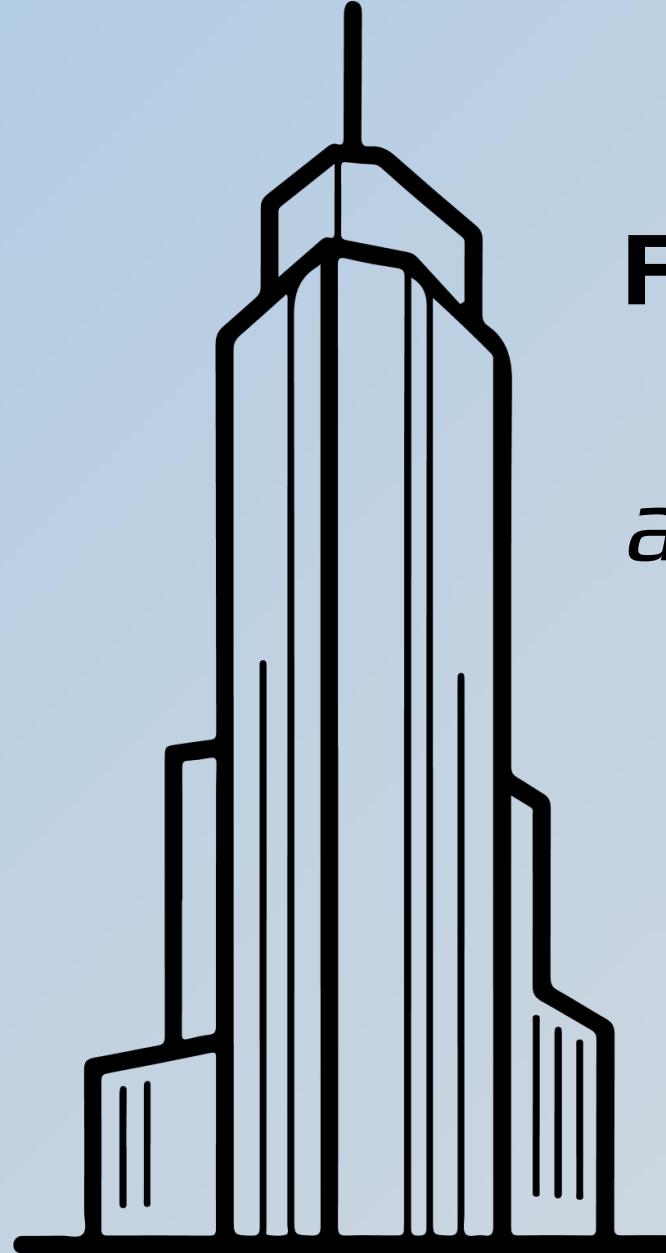
Tech
(Amenities)

↑

Team
(Structure)

↑

**Brand &
Strategy**
(Foundation)



FOUNDATIONS FIRST

*“Growth without
alignment is structural
& financial risk.”*



“As technology reshapes how businesses operate, a RevOps Mindset helps leaders align teams and turn coordination into profitable growth.”

(9) Leadership Habits for a RevOps Mindset

1. Lead with **Trust, Transparency & Authenticity**
2. **Future State:** Data + Tech Operate. Humans Create & Collaborate.
3. Treat **Data Clarity** as a critical form of communication
4. Build with **Integrated Teams & Systems**, not functional silos
5. Point **Goals & KPI's** in one clear direction
6. Think of roles as **SME's, Owners & Decision Makers**
7. **Think in Sprints.** Celebrate small wins.
8. Information is abundant. **Inspire with Wisdom.**
9. Focus on staying **Operationally Lean.**



**“RevOps: From Alignment to Execution –
Bridging Theory with Real World Execution
on both sides of the spectrum.”**





White-label AI
Gift Engagement Hub for
Promo Distributors



10x

Engagement



12x

ROI



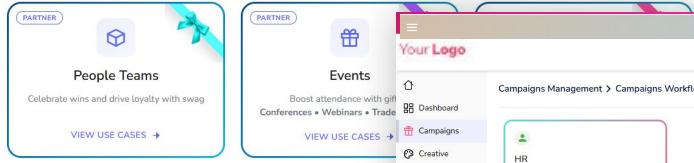
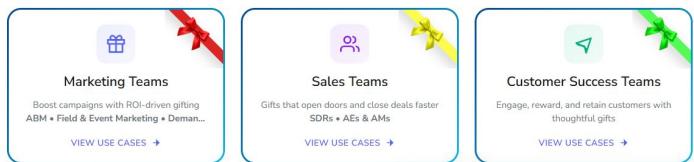
80%

Time Savings



Gifting Services

Elevate your customer engagement with personalized corporate gifting campaigns



It's about
engagement

It was never about the gifts

The collage includes:

- Campaigns Management > Campaigns Workflows:** Shows a "Targeted ABM Campaign Workflow" with steps: "Optional Address Collection" (with a "MAP" icon), "Gift Delivered" (with a gift icon), "Landing Page CTA from Postcard" (with a postcard icon), and "Optional Follow-Up Gift or eGift for" (with a gift icon).
- Creative > Landing Pages:** A screenshot of the landing page creation interface with sections for "Select Campaign" (ZD 2024 CX AI May), "Campaign Details" (Name: ZD 2024 CX AI May, Created: May 13, 2024), and buttons for "Template design", "Test", "Approve", "Reset all", and "Ready".
- zendesk:** A screenshot of the Zendesk interface with the Outage logo at the top.
- Analytics:** A screenshot of the analytics dashboard showing "Filter Data" (Contact, Company, Engaged?, Gift shipment, Page viewed, Image Upload, Select option, Contact submitted), "Shipment Status" (a pie chart with a single segment labeled "DELIVERED"), and "Engagement Status (Actions)" (a bar chart with segments for "Page viewed", "Image Upload", and "Select option").

RevOps = Unified Engine



Single Source of Truth



Frictionless Processes



Full-Funnel Visibility



Scalability & Governance



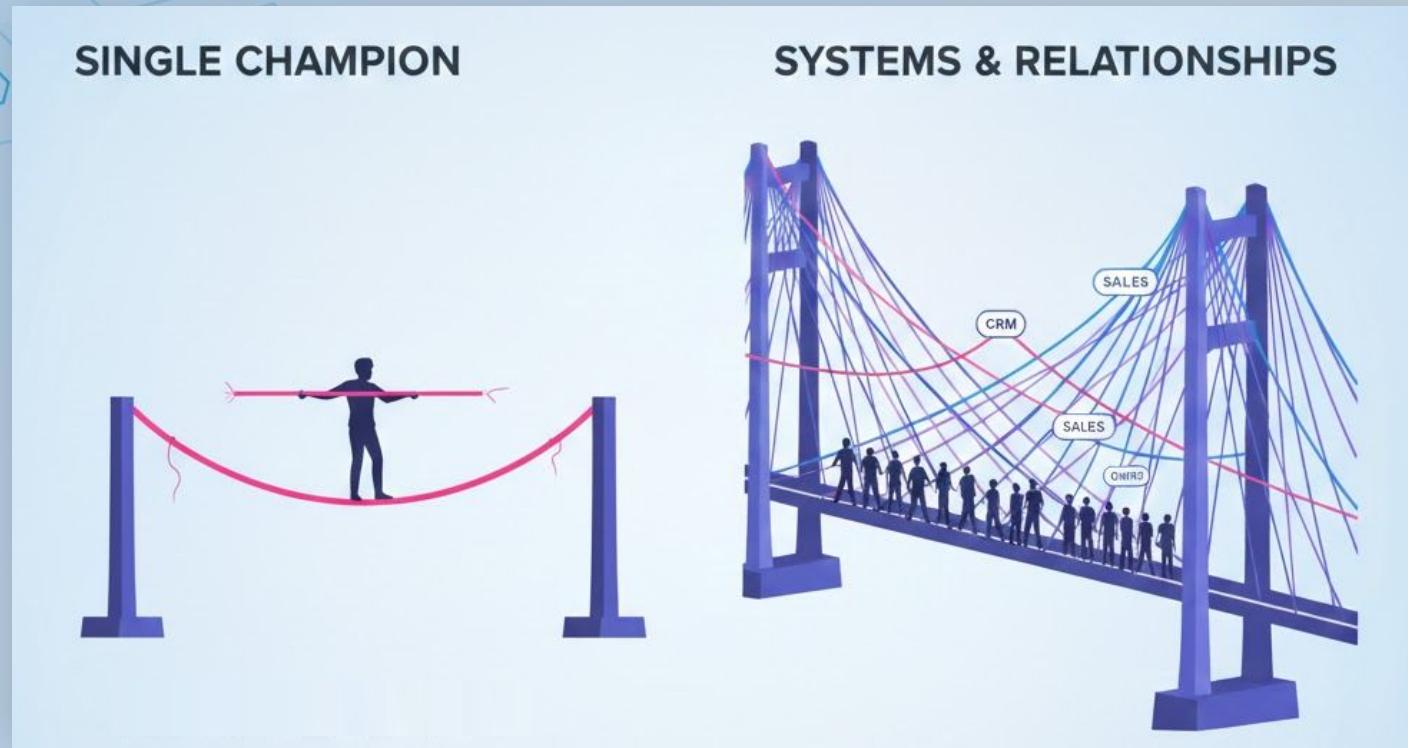
Predictive Analytics

Great Partners = “Sticky” Vendors



- **Serving for the “why” not the “how”:**
Optimizing for engagement, vs giving gifts
- **Give Confidence and Clarity:**
diminish budget variables, relevant + best practice options, project management, results, more..
- **Meet them where they’re at:**
their communication methods, their systems..

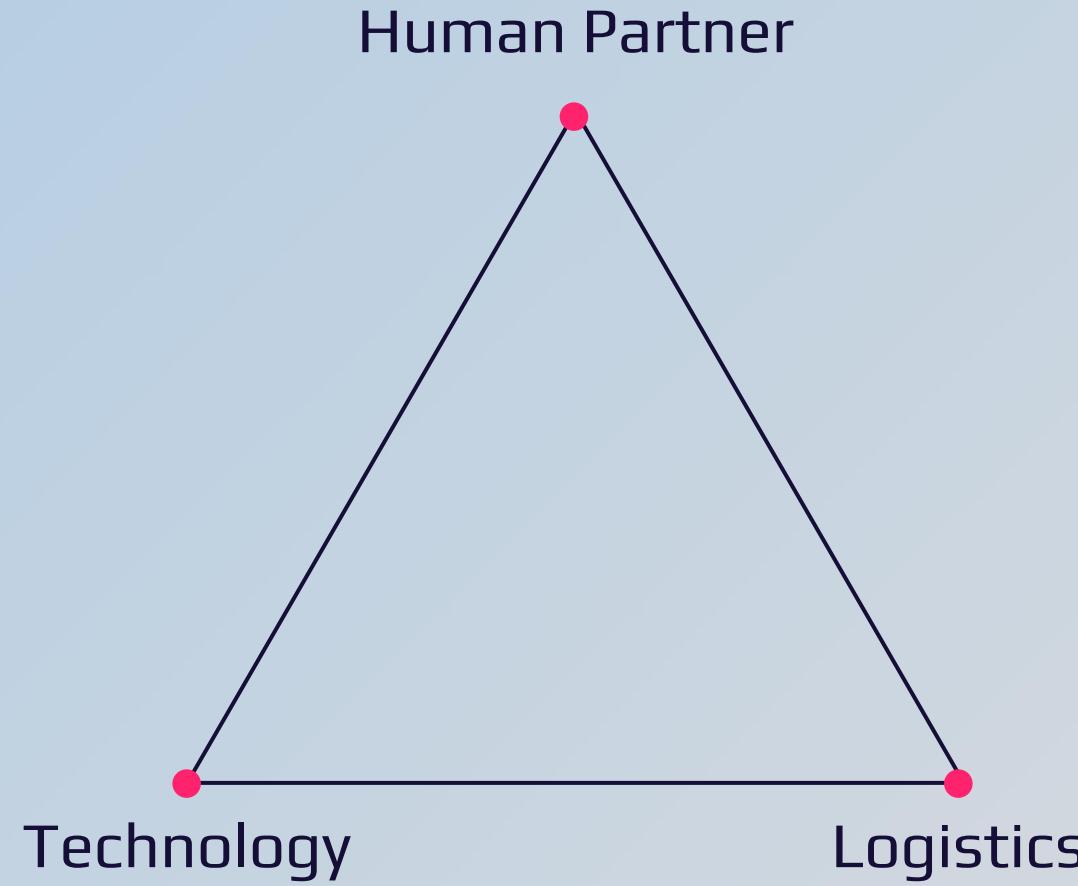
Becoming “Sticky”



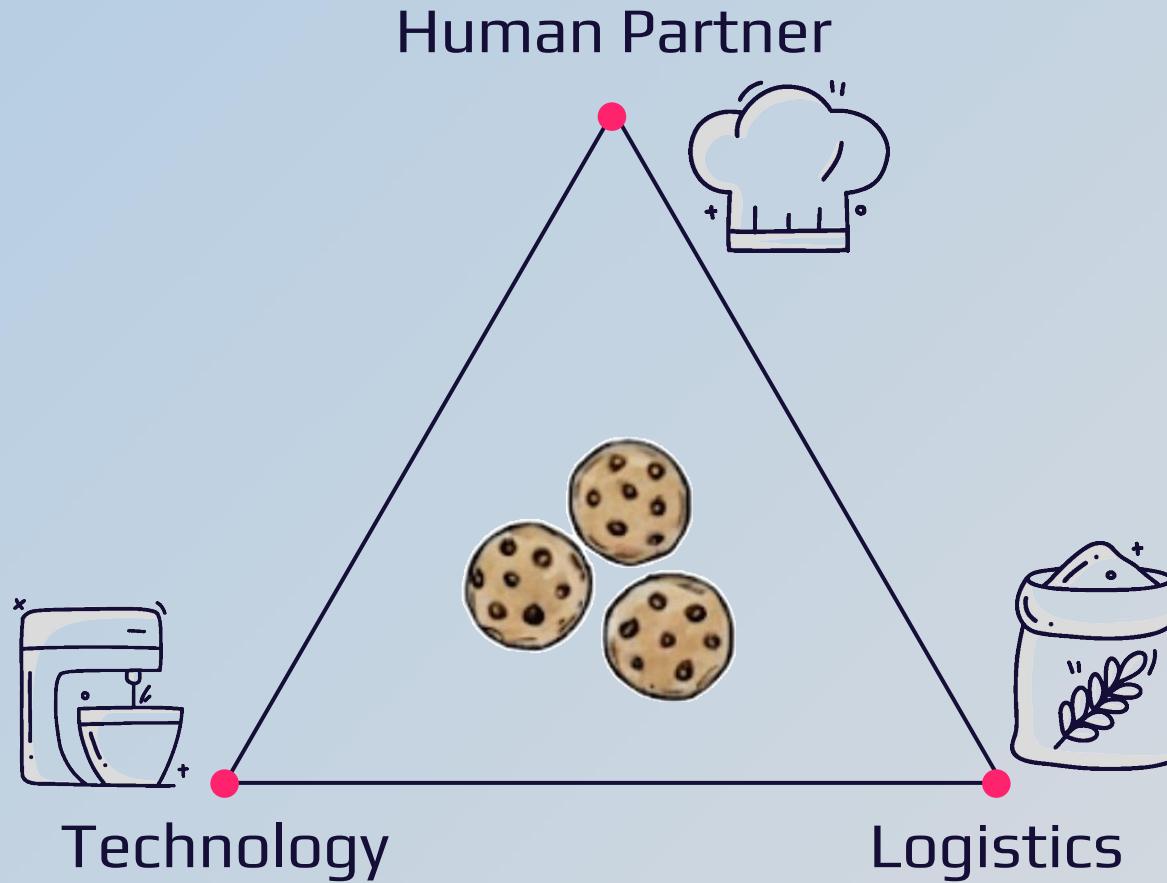
- Scaling Linearly vs Exponentially (Netflix, Blockbusters)
- ABM = Relationships
- Tech Entrenchment
- Strategic + Creative Capabilities



The Promo Partner Model



The Promo Partner Model





Human Partner

- *Execution*
- *Project Management*
- Rapport
- Proactive vs Reactive
- Creative Partner

Amazing Gift Campaigns

- Impactful Engagement
- Great Experience



- Visibility
- Measurement
- Data Enrichment
- Engaging User Experience
- System Integrations



Logistics

- Print Capabilities
- International Capabilities
- Shipping Optimization
- Supply Chain Optimization
- Kitting



Maggie Tonkin

Head of Americas
Field Marketing

This presentation
featured **video content.** It
can be found at this link.

zoom



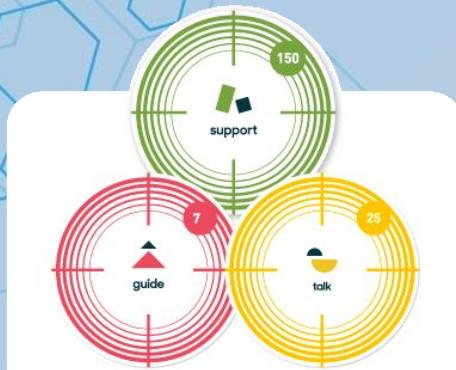
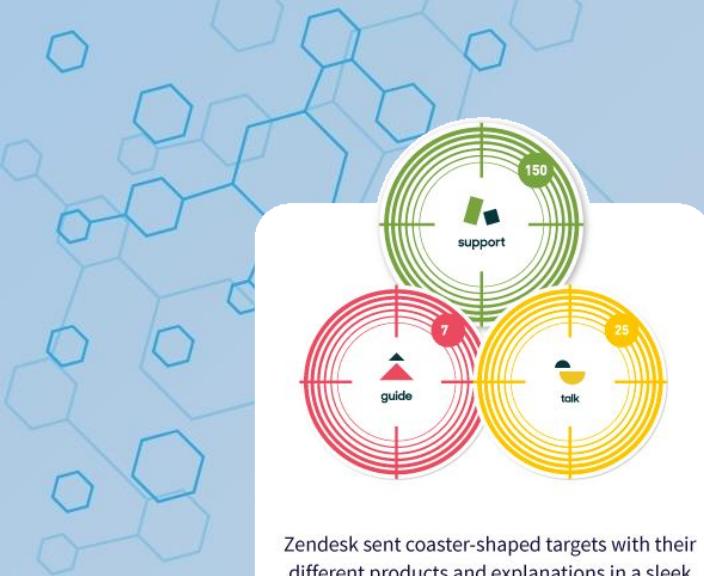
Technology Makes Your Platform Irreplaceable

✓ The gift is the catalyst — not the outcome. Engagement drives pipeline.

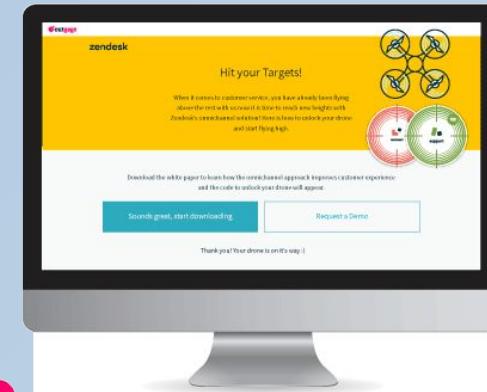
✓ Gift works, but it's hard to prove. Technology makes it measurable and defensible.

✓ Without technology, gifting is swag — not strategy. And swag is the first budget cut.

✓ Proof protects and grows budget. Otherwise dollars move to easier, trackable channels like digital.



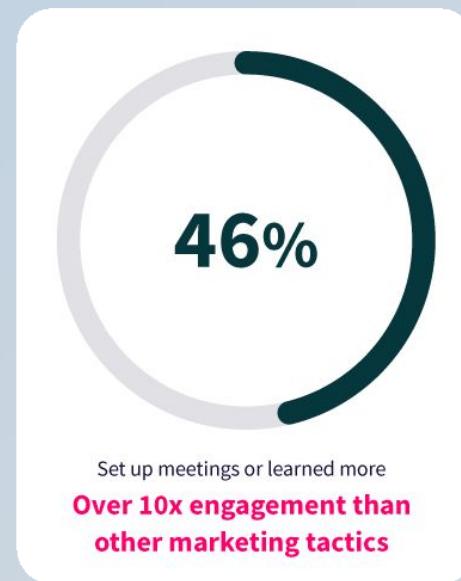
Zendesk sent coaster-shaped targets with their different products and explanations in a sleek tin box with a personalized postcard sending to a landing page in order to “hit your customer support targets with Zendesk and get a drone”



Gift recipients were requested to go to a landing page and would receive a drone upon either “requesting a demo”, which was integrated into their account managers calendly for quick and easy scheduling or “downloading a whitepaper” to learn more and go into a nurture funnel, thus qualifying for recipients who wanted to schedule a meeting.



Upon either call-to-action, recipients would receive a Zendesk branded drone



Gifting as a Scalable Engagement Engine

This campaign wasn’t about sending a gift—it was about using gifting to drive meaningful customer engagement and educate existing customers on the full product suite.

By powering gifting through Outage, we transformed it into a trackable, CRM-integrated experience, giving sales visibility into delivery, timing, and customer interaction.

The result was stronger sales alignment, measurable engagement, and a scalable program that proved gifting—when enabled by technology—can drive real pipeline impact.



Questions



PromoStandards

TECH SUMMIT



RJ HAGEL

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 linkedin.com/in/rjhagel

THANK YOU!

 **outage**



Scan and play(!)
for a chance to win
your own **Event
Game Activation**



PromoStandards

TECH SUMMIT