

DAY 1: SUNDAY FEBRUARY 1, 2026

WELCOME TO



PromoStandards™

TECH SUMMIT

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PromoStandards, Inc.



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Tuesday Morning/Afternoon Breaks



Wednesday Morning Break

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PromoStandards

Annual Members Meeting

PromoStandards Tech Summit 2026



0:00 / 2:44



1x



EVENING AGENDA



New Board Introduction

Welcoming the leaders driving the future of industry standards.



Annual Budget Review

Financial transparency and allocation for growth.



Strategic Initiatives

Roadmap for the upcoming fiscal year.



Food, Fun & Friends



Mission Statement

Our mission is to facilitate open interoperability standards that deliver operational efficiencies to the custom products industry.



Vision Statement

Our vision is to enable technological innovation across the industry by fostering collaboration among our community to achieve standardization and modernization.



How We Are Organized

Board of Directors

Executive Committee

Standards Committee

Best Practices Committee*

Nominating Committee

Membership and Marketing Committee*

Workgroups for 2026

Tech Summit * Decorator * Product Data 3.0 * Event Subscriptions

*evolving in 2026



TECH SUMMIT

2025 Executive Committee



Amy Rabideau
Chair &
MMC Board
Liaison



Catherine Graham
Vice Chair



Eric Alessi
Treasurer



Jon Norris
Member
at Large



Michael Knapick
Nomination
Committee
Chair



Erica Griffitt
Standards
Committee
Chair



Daniel Becker
Best Practices
Board Liaison

Board of Directors Continued

Returning for 2026



Phil Gergen



Edward Streiff



Irwin Goldstein



Dustin Downing

Newly Appointed for 2026



David Goldman



Patrick Elliott

Committee Chairs



Erica Griffitt
Standards



Michael Knapick
Nomination

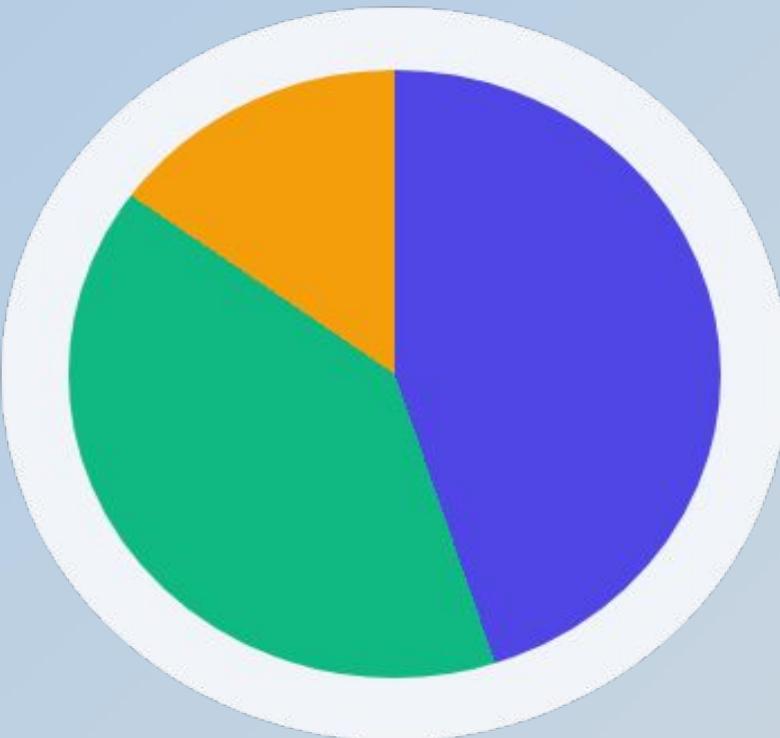


Ajay Kaul
Best Practices



Sarah Gaeta
Membership and
Marketing

2026 BUDGET OVERVIEW



Revenue Proportions

- Membership Dues (\$270k | 45%)
- Event Revenue (\$240k | 40%)
- Event Sponsorship (\$90k | 15%)

MARKETING & BRAND INVESTMENT

The marketing budget represents the largest single investment at \$256,600.

- 🔊 Digital Presence: \$51,600 for advertising, email (Mailchimp), and new member kits.
- 🎤 Industry Events: \$60,000 allocated for 2026 industry presence.
- 💻 Tech Summits: \$145,000 for high-impact technical programming in 2026 and 2027 planning.





BUDGET EFFICIENCY

43%
Programmatic Spend

Marketing-Forward Allocation

Nearly half of the total budget is directly reinvested into marketing, industry events, and technology summits that provide tangible value to members.

Administrative overhead is kept lean at 13%, ensuring that resources are prioritized for member-facing initiatives and industry standardization efforts.

Membership Trends

Year	Associate	Adopting	Advisory	Total Members
2021	125	7	21	153
2022	151	13	23	187
2023	94	12	28	134
2024	146	12	28	186
2025	148	16	29	193
2026 (Current)	156	15	30	201

GROWTH INSIGHTS



Associate Resilience

Despite a dip in 2023, the Associate tier remains our largest and fastest-growing segment, recovering with a 65% surge in 2024.



Advisory Stability

The Advisory segment shows consistent, linear growth year-over-year, providing a solid foundation of strategic industry leadership.



2026 Outlook

Crossing the 200-member milestone signifies a major shift in industry adoption, with more companies moving into high-value tiers.

STRATEGIC INITIATIVES



- ✓ **API Expansion:** New endpoints for decoration and pricing.
- ✓ **Integration Tools:** Simplified SDKs for faster onboarding.
- ✓ **Data Quality:** SAQ - Supplier Attestation Questionnaire.
- ✓ **Community Engagement:** Monthly office hours and working groups.

DAY 2: MONDAY FEBRUARY 2, 2026

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Amy Rabideau

**VP of Client & Community Engagement
Antera Software**

**PromoStandards Chair &
MMC Board Liaison**

A COMMUNITY BUILT TO THRIVE

...From Survival to Competitive Advantage

Private Equity & M&A

Navigating consolidation and capital shifts.

Global Challenges

Turning COVID and Tariffs into resilience.

The AI Revolution

Harnessing disruption as a tool for growth.



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SHAPING THE INDUSTRY LANDSCAPE



AI & AUTOMATION

Harnessing for operational efficiency, enhanced output, and smarter workflows.



INTEGRATIONS

Seamless connectivity between keystone apps, tools, and processes throughout the supply chain.



SUSTAINABILITY

Integrating climate and ESG goals into the core of our tech stack.



OUR EVOLUTION: THE SUMMIT JOURNEY



EARLY DAYS

Advisory
members meeting
together



EXPANSION

Partnership with
PPAI for one-day
technical intensives



Tech Summit

2023 1st
PromoStandards
Tech Summit



WHY TECH SUMMIT?

FOR OUR COMPANIES

Stronger relationships and best-practice sharing that reduces R&D costs and accelerates time-to-market.

FOR OUR ATTENDEES

Continuous learning and networking with the brightest minds in the promo, print, signage, and uniform industries.



LOGISTICS & HOUSEKEEPING



AGENDA

Live schedule available at PromoStandards.org.
All other updates will be in our Slack channel.



MEDIA

Audio/Video recording in progress.



Food & Bev

Breaks, Meals, Opening Reception

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Wednesday Morning Break

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THE STATE OF TECH IN PROMO



Chris Alfano
CDO
Vantage Apparel

PANELISTS:



Kate Alavez
President
PromoShop



Dino Bangiorno
Managing Director
eXtendTech



Ashley Colautti
VP of Sales
Spector & Co

STATE OF TECH IN PROMO





Our Session Today

- State of the Industry
- Panel Discussion
- Open Q&A



Promo Is Quietly Being Rebuilt

Historically optimized for:

- Bulk orders
- Long lead times
- Manual handoffs
- Relationship-driven workflows

Today's buyers expect:

- Consumer e-commerce experiences
- No minimums
- On-demand Fulfillment
- Real-time order status and tracking



The Macro Forces Driving This Shift

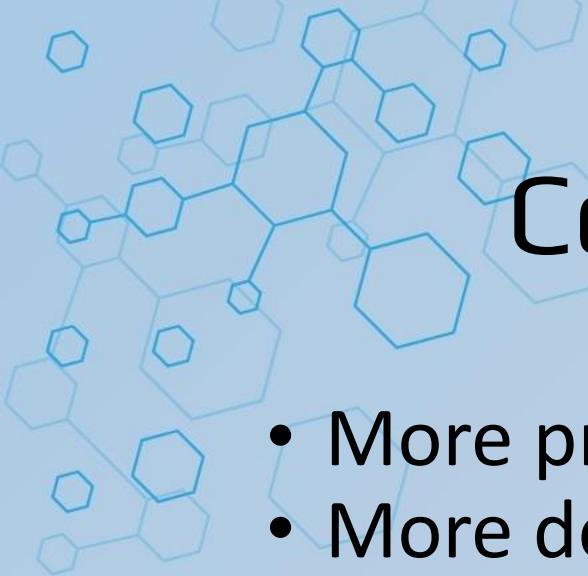
Order Pattern & Requirement Changes

- Customers not wanting to pre-buy in bulk
- Distributors not wanting/able to warehouse bulk
- Increased corporate focus on sustainability & waste
- No-minimum orders
- Dropship to home programs
- Always-on stores
- Pop-up / campaign stores



Print-on-Demand Crossing Into Promo

- Traditional POD players are moving upstream:
 - Faster fulfillment time
 - Automated artwork flows
 - Blank + decoration as one transaction
 - One transaction for a mix of products
- Promo is moving downstream:
 - E-Commerce Storefronts
 - API Order Integrations
 - Real-time production visibility



Complexity Has Gone Vertical

- More product variety
- More decoration methods
- More integrations
- More compliance requirements
- More systems per company



How This Is Reshaping the Industry

Distributors: From Sales to Platform Operators

Key shifts:

- From quoting to enabling
- From one-off orders to ongoing programs
- From transactions to platforms

They now manage:

- E-commerce sites
- Data normalization
- Multi-Supplier
- Artwork pipelines

New expectations:

- Speed to launch
- System-to-system automation
- Error elimination
- Scalable client programs

Suppliers: From Bulk Manufacturers to On-Demand Production Networks

More:

- Single piece orders
- Mixed decoration workflows
- Real-time inventory exposure
- API integrated customers

Less:

- Static price lists
- Predictable bulk waves
- Manual order entry

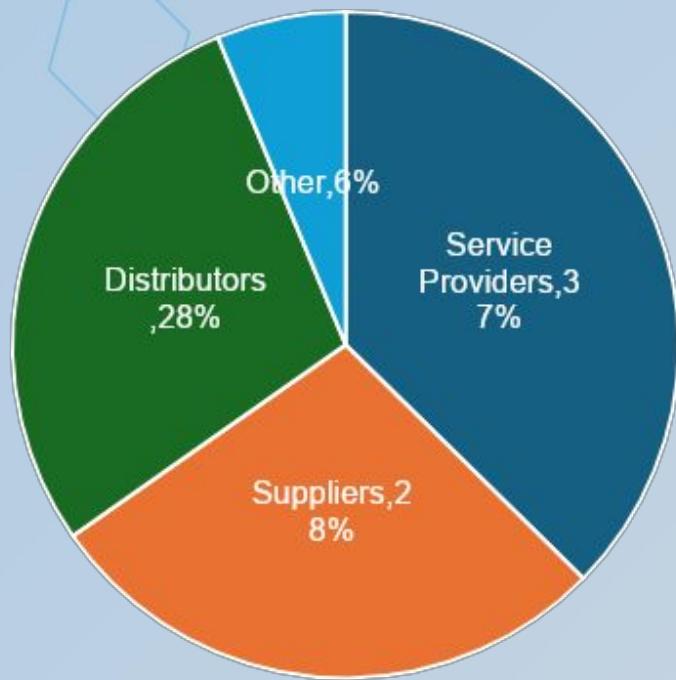
Tech stacks expanding:

- PIMs
- Artwork Automation
- Production Routing
- Shipping intelligence
- Compliance & security layers

Service Providers & Software Companies

- The fastest expansion in promo tech is happening in:
 - Middleware & integration platforms
 - API driven artwork automation
 - AI
 - Production workflow tools
 - Order management systems
- Why? Promo's core systems weren't built for:
 - API ecosystems
 - Connected real-time production orchestration
 - 24/7 store programs
 - Current speed of the industries technology transformation

Quick Pulse Check: Who's in the Room?



Service providers are here in force because promo's competitive advantage is shifting from who you know and what you sell... to what your systems can support.

Our Panelists Today



Ashley Colautti
Vice President of Sales

SPECTOR



Dino Bangiorno
Managing Director

extendTech



Kate Alavez
President

**ps promo
shop**

 **PromoStandards**

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BREAKOUT SESSION - ROUND 1

BREAKOUT 1:
PromoStandards Best Practices

Dunes Ballroom (here!)



Ajay Kaul
IT Operations Leader
SanMar

BREAKOUT 2:
Volunteering with PromoStandards

Sandpiper (3rd Floor)



Jessica Shonebarger
Executive Director
PromoStandards

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artifi



BREAKOUT SESSION - ROUND 1

BREAKOUT 1:
PromoStandards Best
Practices
Dunes Ballroom (here!)



PromoStandards Best Practices Committee

“2025” Year in Review

Presenters



Ajay Kaul (Chair)
IT Operations Leader
Product/App Support
SanMar



Patrick Elliot
Director of IT
SnugZ USA



Steve Kasperson
Staff Engineer
S&S Activewear



David Goldman
Director of Technology
Cimpress

Best Practices Committee



Ajay Kaul (Chair)

Manager, Product/App Support,
SanMar



Patrick Elliot

Director IT, SnugZ USA



Dan Erdman

Partner Integration Mgr, Koozie
Group



Mehmet Huber

CTO, Web Service Pros



Steve Kasperson

Staff Engineer, S&S



Richard Carrion

Product Manager, Halo



Daniel Becker (Liaison)

CTO, Kotis Design



Stephen Luisser

Vice President of Research, Essent
Corporation



David Goldman

Director of Technology, Cimpress



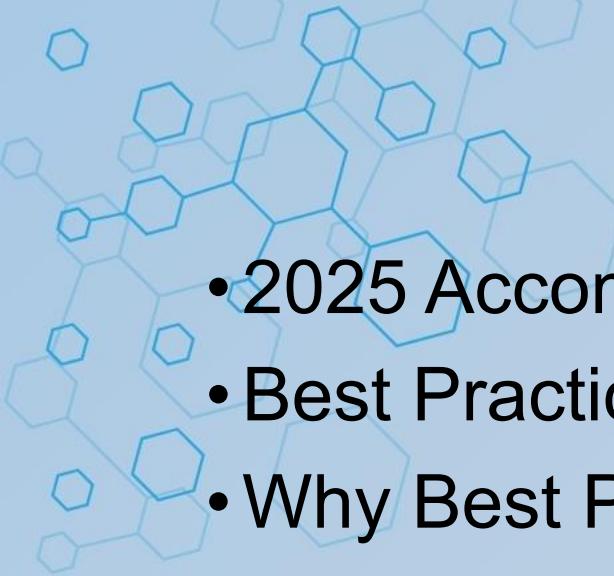
Jamie Steckel

Integration Analyst/Software Support
Specialist, Essent Corporation



Michael Horton

Lead Ops Specialist, Antera Software



Agenda

- 2025 Accomplishments
- Best Practices site demo
- Why Best Practices exist? Good, Bad, & the Ugly
- Self Assessment Questionnaire
- New Best Practices specs
- 2026 Roadmap
- Q&A



2025 Accomplishments

- Self Assessment Questionnaire
- Remittance Advice 1.0
- Company Data 1.0
- OSN 2.0
- Order Status 2.0
- XML sample request/response

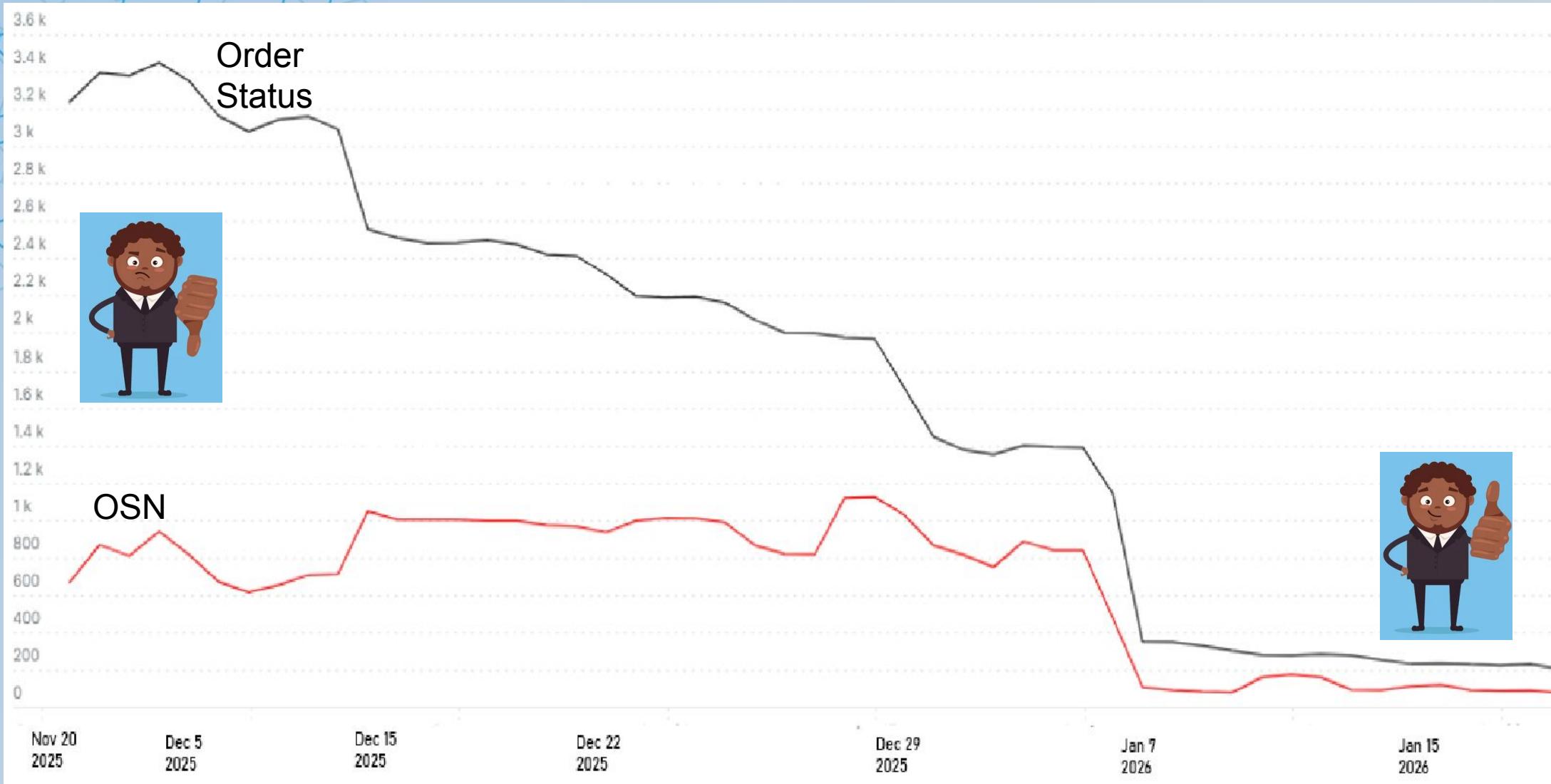
Best Practices Site Demo

Why Best Practices exist? Good, Bad, & the Ugly



BEST PRACTICES: Ideal. **STANDARDS:** Mandatory

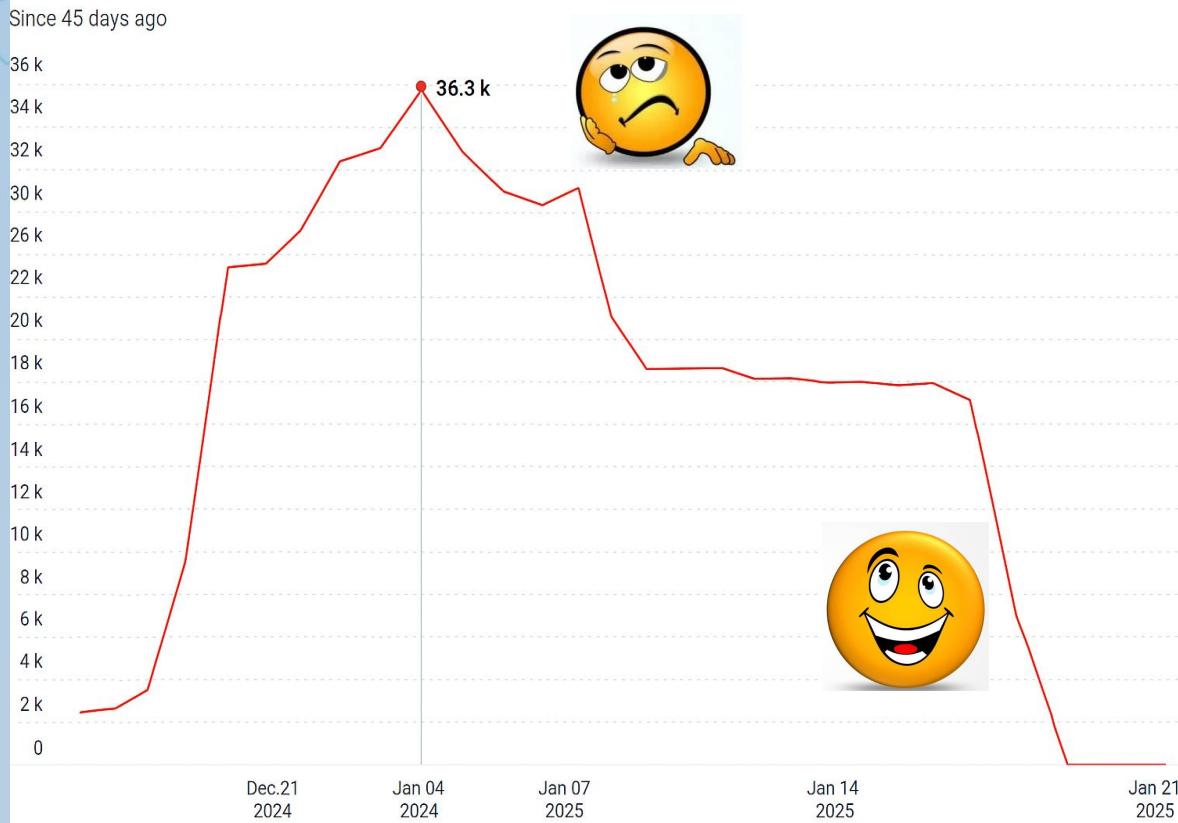
API Overuse - Order Status/OSN



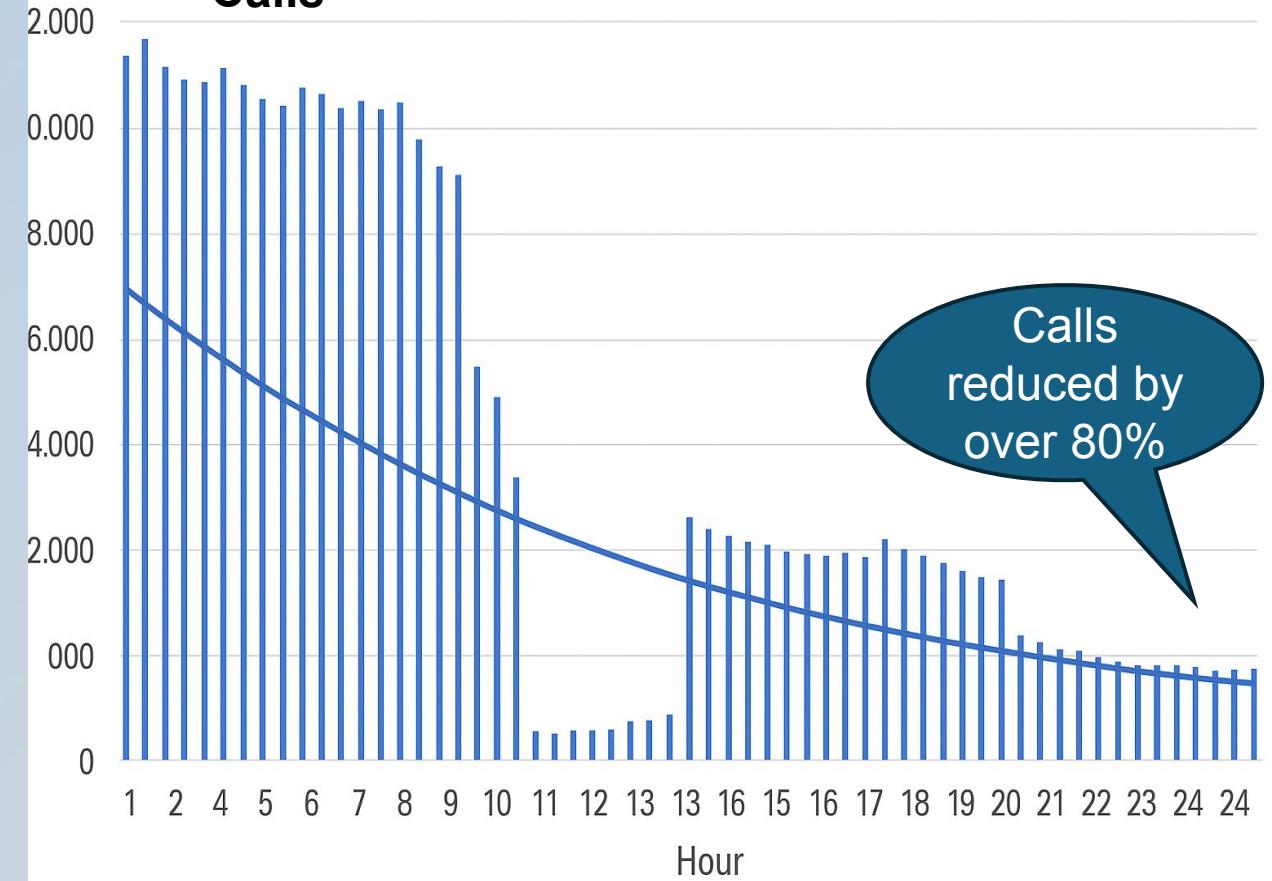
[https://promostandards.atlassian.net/wiki/spaces/BPP/pages/1408467010/
Supplier+Templates+and+Best+Practices](https://promostandards.atlassian.net/wiki/spaces/BPP/pages/1408467010/Supplier+Templates+and+Best+Practices)

API Overuse – Inventory/PPC

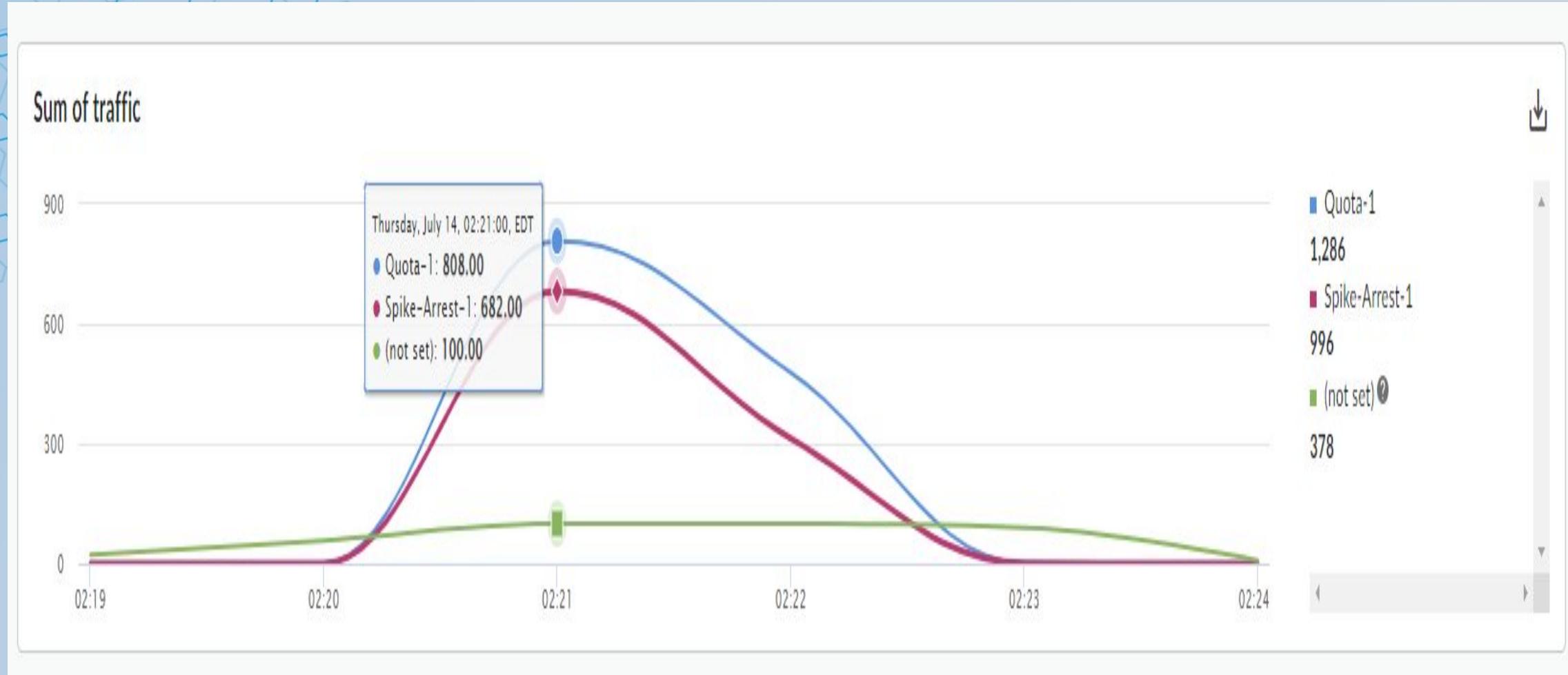
Failed Inventory Calls



Failed PPC and Product data Calls



API Overuse – Product Data



This is what it looks like when someone attempts ~1,600 Product API requests per minute – here the majority are rate limited.

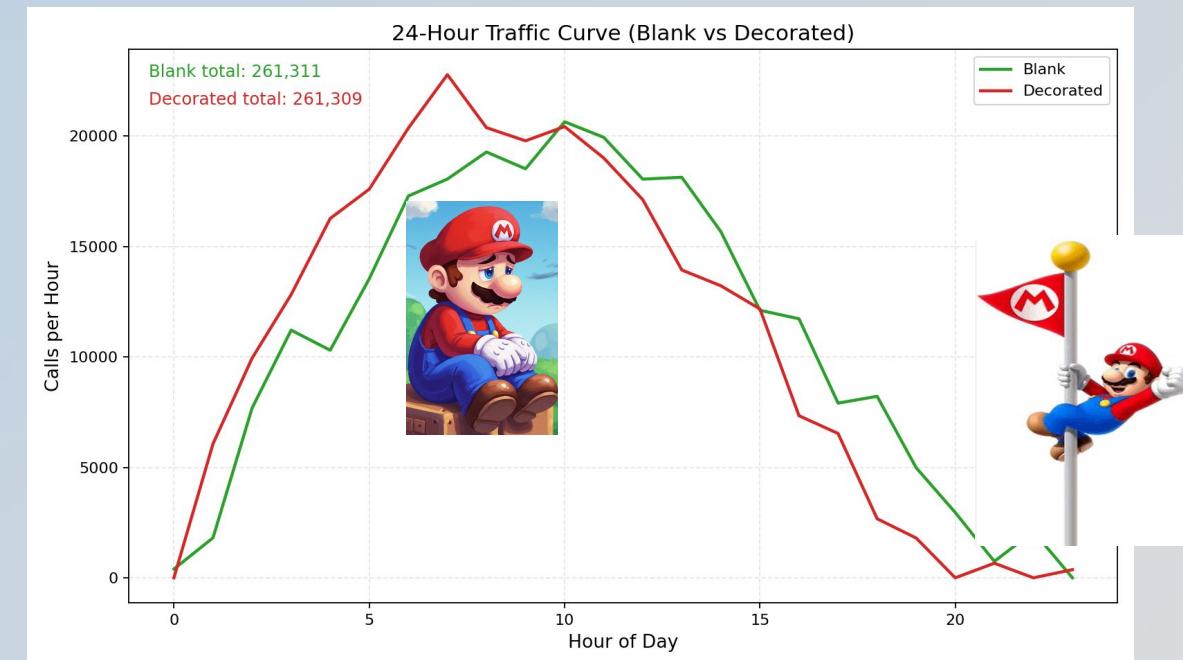
Invalid Address

```
<shar:ShipTo>
  <shar:ContactDetails>
    <shar:companyName>ABC Embroidery</shar:companyName>
    <!--Optional:-->
    <shar:address1>PACKAGES WILL GET STOLEN ON FRONT PORCH</shar:address1>
    <!--Optional:-->
    <shar:address2>15 Broad St</shar:address2>
    <shar:city>King City</shar:city>
    <!--Optional:-->
    <shar:region>OR</shar:region>
```



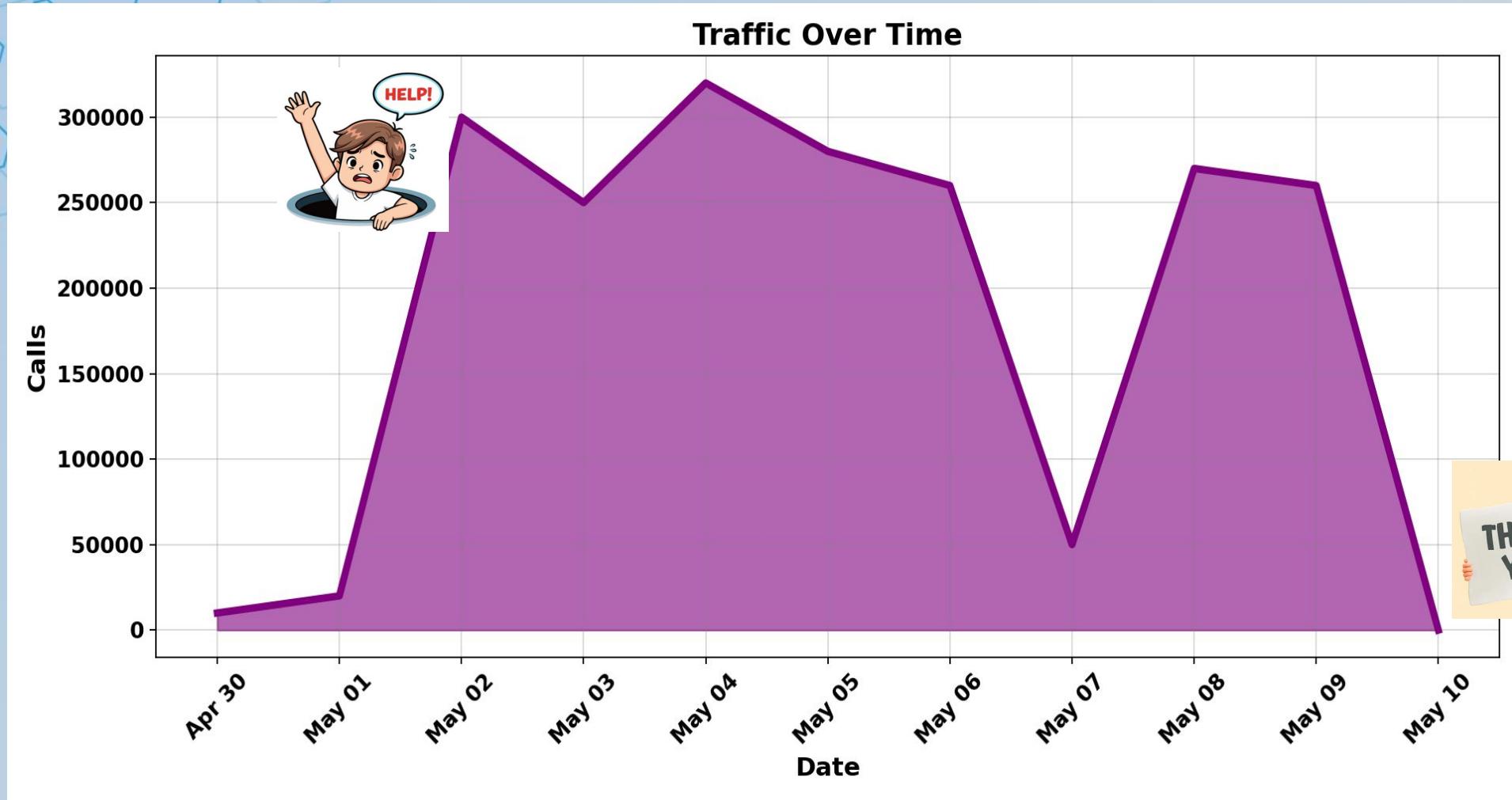
Pulling Decorated vs Blank pricing data through PPC 1.0

```
<shar:configurationType>Blank</shar:configurationType>
<shar:configurationType>Decorated</shar:configurationType>
```



Pulling pricing/other data by FOB through PPC 1.0

<shar:fobId>6</shar:fobId>



Best Practices, the good, the bad, & the ugly



David Goldman
Director of Technology
Cimpress



easy CANVAS PRINTS



l'atelier de tous les créatifs



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Best Practices, the good, the bad, & the ugly



Technically, it's a bridge. The "crossing" part is just a nice-to-have.

Best Practices, the semantics of text fields

Lots of character string fields in our standards.

You can set text fields to anything you like.

E.g. What does it mean when a “Color Name” for a partID is set to a value of “Stapled Calendar”?

	Color Name
Red	Red
Blue	Blue
Green	Green
Green	Green
Red	Red
Blue	Blue

Expectation
(Standardized Data)



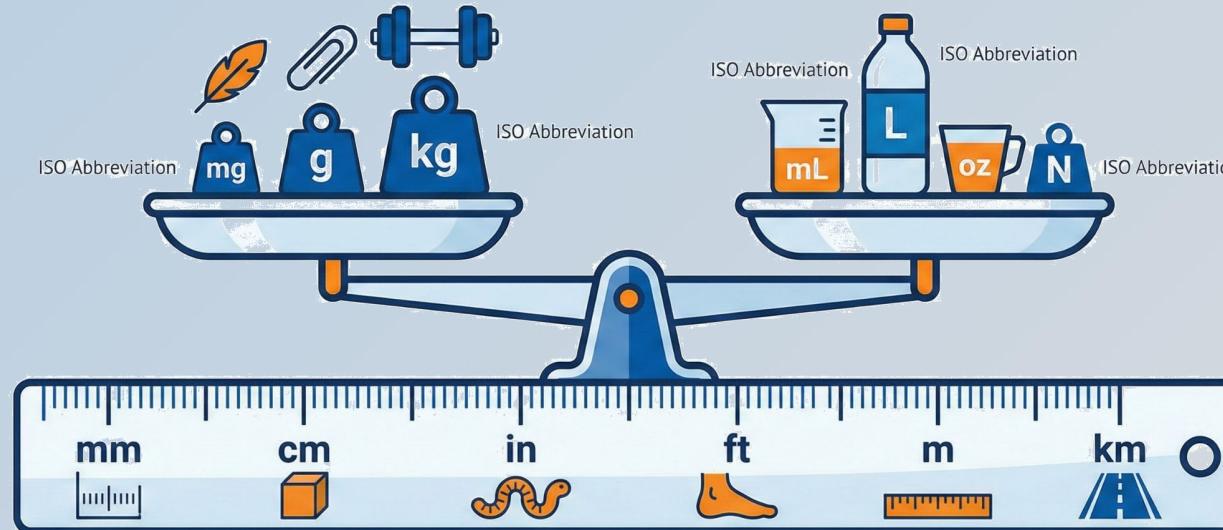
	Color Name
#6x505F	#6x505F
It's the color of my car	It's the color of my car
42	42
aBcDeF	aBcDeF

Reality
(Free Text Fields)

Best Practices, Units of Measure

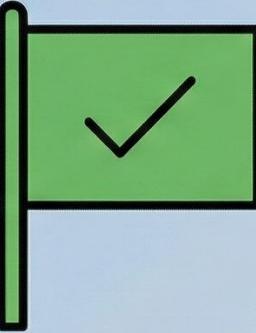
“The unit of measure for the decoration area in ISO 20022”

This is defined as a VARCHAR(64), how should it be set?
“IN” or “inches” or “inch” or “IN (inch)”



Best Practices, Product Status

`isSellable=TRUE`



`E`

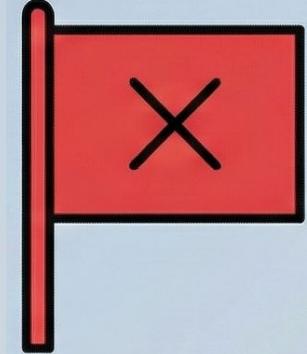
What does it mean when:

`getProductSellable()`

`getProductCloseOut()`

all return the exact same set of products?

`isCloseout=FALSE`



`W`

Best practices on “Product Status” can help!

Best Practices for Product Status

A short excerpt of what you'll see within the Best Practices Confluence

is presented in the table below.

Product Status	Summary	isSellable	isCloseout
Active with restock	Available for purchase, includes supplier's intention to restock when inventory is depleted	TRUE	FALSE
Active with no restock	Available for purchase, but won't be restocked when current inventory is depleted	TRUE	TRUE
Inactive	Not available for purchase, won't be restocked	FALSE	TRUE

<https://promostandards.atlassian.net/wiki/x/AQDPdw>

Or login at promostandards.org

- Select Resources/Best Practices
- Then search “**product status**”

Other Potential Future Best Practices

Distributor's perspective: better names and descriptions

Guidance for how to best name and describe your products

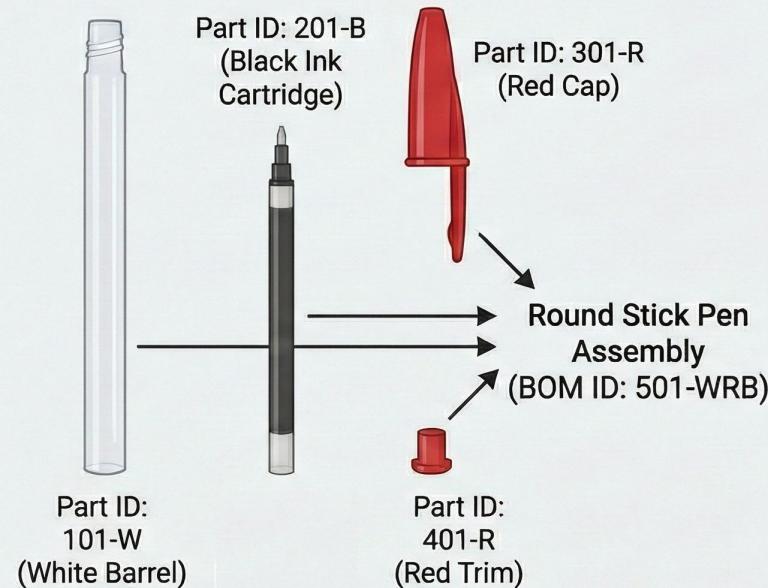
3.5" Cube Black Base - This Cube Black Base is certainly a statement



Other Potential Future Best Practices

What is a “PartId”? How can or should suppliers use it?
(and/or indicate how it is being used)

BILL OF MATERIALS



Parts are ordered individually
for assembly and fulfillment.

PRODUCT VARIATION



Parts are tracked as different
complete variations of the product.

Why best practices? Distributors will love you!

Fewer e-mails, meetings or phone calls

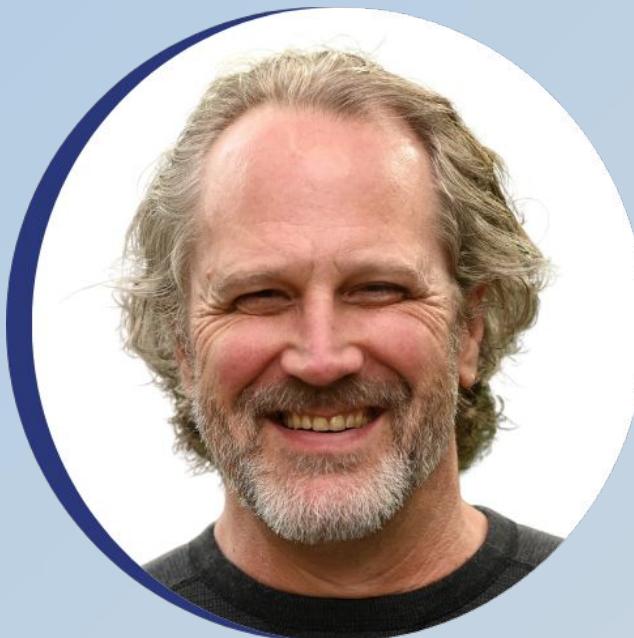
More of your catalog on more distributor sites



less waddle

more slide

Self Assessment Questionnaire



Steve Kasperson
Staff Engineer
S&S Activewear



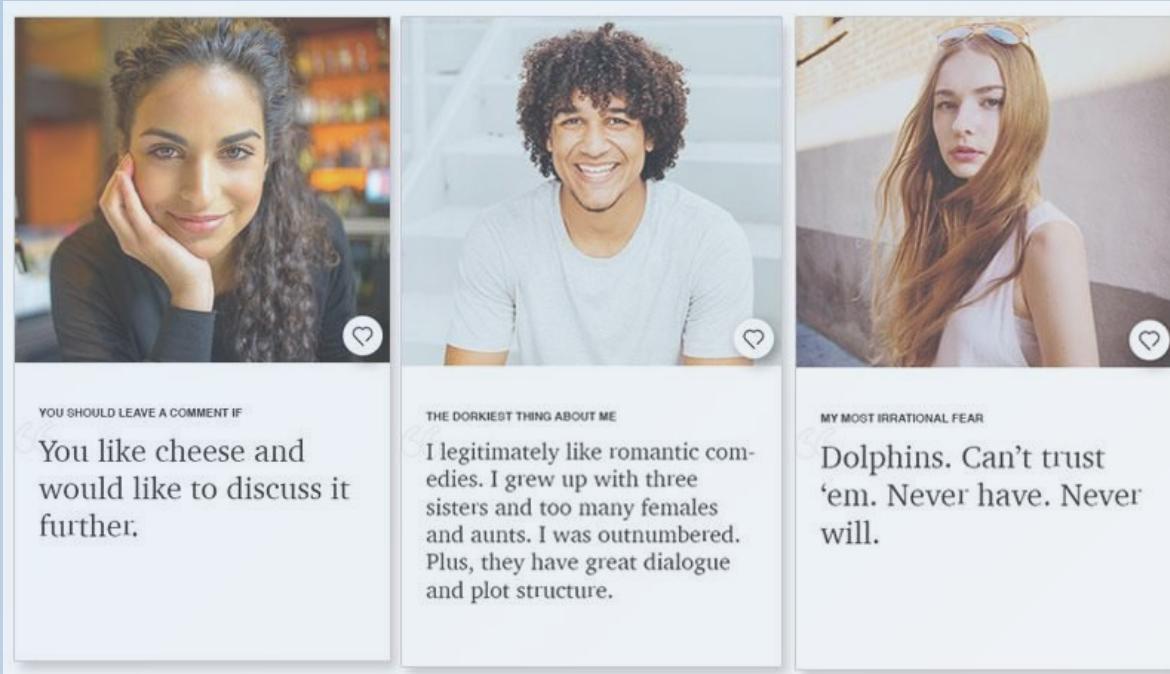
Self Assessment Questionnaire

- Implementation
- Ongoing Support
- Compliance with the Specifications
- Compliance with Best Practices
- Communication
- Performance and Security
- Attestation and Validation

Self Assessment Questionnaire

Think of this as your company's "dating profile"

You want to present yourself well, but at the same time you need to be honest.



Your integration partners should be comfortable that you are a good match.



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2025 PromoStandards Best Practices New Specs and XML Examples



Patrick Elliot
Director of IT
SnugZ USA

Why XML Examples



5 new Specs in 2025



New XML Examples for 12 endpoints.



- Community feedback drove the change
- Reduce ambiguity
- Accelerate onboarding and consistency



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XML Examples Preview

- Request Product Data 2.0 getProduct

getProduct Hard Good 2.0

▼ Request

```
1 <GetProductRequest xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns="http://www.promostandards.org/WSDL/ProductDataService/2.0.0/">
2   <wsVersion xmlns="http://www.promostandards.org/WSDL/ProductDataService/2.0.0/SharedObjects/">Token1</wsVersion>
3   <id xmlns="http://www.promostandards.org/WSDL/ProductDataService/2.0.0/SharedObjects/">Token1</id>
4   <password xmlns="http://www.promostandards.org/WSDL/ProductDataService/2.0.0/SharedObjects/">Token1</password>
5   <localizationCountry xmlns="http://www.promostandards.org/WSDL/ProductDataService/2.0.0/SharedObjects/">T1</localizationCountry>
6   <localizationLanguage xmlns="http://www.promostandards.org/WSDL/ProductDataService/2.0.0/SharedObjects/">T1</localizationLanguage>
7   <productId xmlns="http://www.promostandards.org/WSDL/ProductDataService/2.0.0/SharedObjects/">Token1</productId>
8   <partId xmlns="http://www.promostandards.org/WSDL/ProductDataService/2.0.0/SharedObjects/">Token1</partId>
9   <colorName xmlns="http://www.promostandards.org/WSDL/ProductDataService/2.0.0/SharedObjects/">Token1</colorName>
10  </GetProductRequest>
```

XML Examples

Preview

- Response Product Data 2.0
getProduct

Response

```
1 <SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/" xmlns:ns1="http://www.promostandards.org/WSDL/ProductDataService/2.0.0/ShadedObjects/" xmlns:ns2="http://www.promost...>
2 <s:Header xmlns:s="http://schemas.xmlsoap.org/soap/envelope/" />
3 <SOAP-ENV:Body>
4   <ns2:GetProductResponse>
5     <ns2:Product>
6       <ns1:productId>5000</ns1:productId>
7       <ns1:productName>Gildan® Adult Heavy Cotton™ T-Shirt</ns1:productName>
8       <ns1:description>5.3 Oz. Pre shrunk 100% Cotton Jersey (Blended Cotton/Polyester in Antique, Heather, Neon and Safety Colors). Seamless Double-Needle 7/8" Collar. Taped Neck and Shoulders. Double
9       <ns2:ProductMarketingPointArray>
10      <ns1:ProductMarketingPoint>
11        <ns1:pointType>Highlight</ns1:pointType>
12        <ns1:pointCopy>5.3 Oz. Pre shrunk 100% Cotton Jersey (Blended Cotton/Polyester in Antique, Heather, Neon and Safety Colors). Seamless Double-Needle 7/8" Collar. Taped Neck and Shoulders. Double
13      </ns1:ProductMarketingPoint>
14    </ns2:ProductMarketingPointArray>
15    <ns1:productBrand>Gildan</ns1:productBrand>
16    <ns2:export>true</ns2:export>
17  </ns2:ProductCategoryArray>
18  <ns1:ProductCategory>
19    <ns1:category>Apparel</ns1:category>
20    <ns1:subCategory>Short Sleeve</ns1:subCategory>
21  </ns1:ProductCategory>
22  <ns1:ProductCategory>
23    <ns1:category>Apparel</ns1:category>
24    <ns1:subCategory>Apparel - Men's</ns1:subCategory>
25  </ns1:ProductCategory>
26 </ns2:ProductCategoryArray>
27 </ns2:ProductPriceGroupArray>
28  <ns1:ProductPriceGroup>
29    <ns1:ProductPriceArray>
30      <ns1:ProductPrice>
31        <ns1:quantityMin>72</ns1:quantityMin>
32        <ns1:price>9.55</ns1:price>
33        <ns1:discountCode>C</ns1:discountCode>
34      </ns1:ProductPrice>
35      <ns1:ProductPrice>
36        <ns1:quantityMin>144</ns1:quantityMin>
37        <ns1:price>6.26</ns1:price>
38        <ns1:discountCode>C</ns1:discountCode>
39      </ns1:ProductPrice>
40      <ns1:ProductPrice>
41        <ns1:quantityMin>288</ns1:quantityMin>
42        <ns1:price>5.31</ns1:price>
43        <ns1:discountCode>C</ns1:discountCode>
44      </ns1:ProductPrice>
45      <ns1:ProductPrice>
46        <ns1:quantityMin>504</ns1:quantityMin>
47        <ns1:price>4.49</ns1:price>
48        <ns1:discountCode>C</ns1:discountCode>
49      </ns1:ProductPrice>
50    </ns1:ProductPriceArray>
51    <ns1:groupName>Embroidery</ns1:groupName>
52    <ns1:currency>USD</ns1:currency>
53  </ns1:ProductPriceGroup>
54  <ns1:ProductPriceGroup>
55    <ns1:ProductPriceArray>
56      <ns1:ProductPrice>
57        <ns1:quantityMin>72</ns1:quantityMin>
58        <ns1:price>12.91</ns1:price>
59        <ns1:discountCode>C</ns1:discountCode>
60      </ns1:ProductPrice>
61      <ns1:ProductPrice>
62        <ns1:quantityMin>144</ns1:quantityMin>
63        <ns1:price>11.23</ns1:price>
64        <ns1:discountCode>C</ns1:discountCode>
65      </ns1:ProductPrice>
66      <ns1:ProductPrice>
67        <ns1:quantityMin>288</ns1:quantityMin>
68        <ns1:price>9.76</ns1:price>
69        <ns1:discountCode>C</ns1:discountCode>
```

Other Scenario Examples – Get Product Data

- Scenarios give ideas on how to use the Service.
- One Example is in the Product Data 2.0 Best Practice Document. This explains how to use Closeout and to Show Active/Inactive status in their catalog.

Best practice usage by distributors

For suppliers managing their catalog according to best practices, distributors are recommended to consume those catalogs using the above endpoints in the sequence outlined in the table below.

Step #	Endpoint usage	Purpose
1	<code>getProductSellable()</code>	Retrieve the list of all product IDs available for purchase from the supplier. Used to initialize (or re-initialize) the full list of products that the distributor may purchase.
2	<code>getProduct()</code> called for each product ID returned from the previous call	Retrieve detailed product info for each product ID returned previously. Note values of "isSellable" and "isCloseout" as the indication of product status .
3	<code>getProductDateModified()</code> called with date at which product information was last retrieved from the supplier	Retrieve the list of product IDs that have had data or status updated since your last refresh of data from supplier (e.g. since the endpoints here were last called)
4	Return to step 2	

Important rules and comments:

1. `getProductCloseout()` is a convenience endpoint that allows a distributor to directly see any product or part IDs from a supplier that have been recently discontinued or will soon be discontinued. This status is also visible from data returned by `getProduct()`.
2. It is reasonable to expect that product data will not be updated by a supplier more than once per day. Hence, it is a best practice that distributors will at most call `getProductDateModified()` once per day to ensure product information and status is kept appropriately in sync with the supplier.
3. Distributors may want to re-initialize the supplier's catalog via `getProductSellable()` with some regularity (recommended at least once per month and at most once per day) to ensure a complete and accurate version of the supplier's catalog.
4. Distributors should attempt to only call `getProduct()` for product IDs where the supplier has indicated the product data has been modified since the last time product data was retrieved for that ID (via a previous call to `getProduct()` for that product ID). For this reason, distributors should track within their own internal IT systems, the time at which product data was last retrieved/updated.
5. Keep in mind that individual Part IDs may have their status or product data updated, even if other

2025 New Specs

- Remittance Advice 1.0
- Company Data 1.0
- OSN 2.0
- Order Status 2.0

RemittanceDetail Object

Field	Description	Data Type	Required	Best Practice
referenceNumber	This document number to pay based on the referenceNumber Type.	64 String	True	
referenceNumber Type	The document type for the referenceNumber .	Enumeration	True	
creditMemoNumber	If set, apply this amount to the Invoice from the credit memo.	64 String	False	Only set this value when consuming all or part of a credit memo.
amount	This element contains the amount applied for the payment. The value must be greater than zero.	Decimal	True	



PromoStar

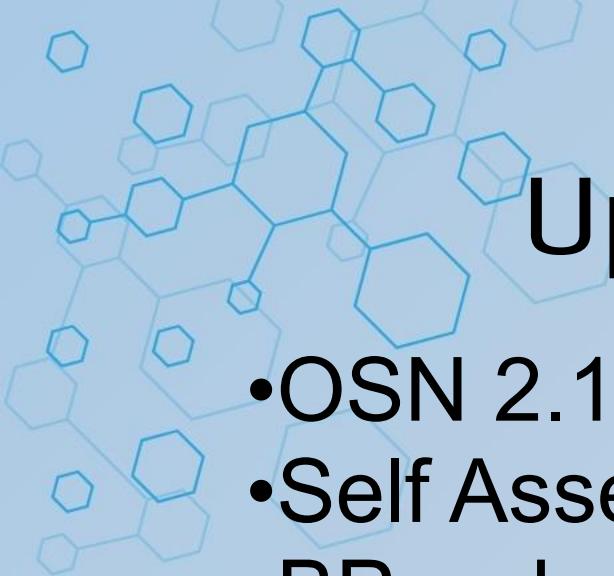
The open industry-standard way to connect partners across the promotion value chain

[Learn More](#)

[Service Provider Directory](#)
[Documentation and Specifications](#)
[Service API](#)
[Endpoints](#)
Best Practices
[Web Service Validator](#)

Where to find this new information:

- [PromoStandards.org](#) → Resources → Best Practices



Upcoming Milestones (2026)

- OSN 2.1
- Self Assessment Questionnaire (update)
- BP website update/migration
- Enhance User Engagement experience
- FAQ/Knowledge base
- Prioritizing new specifications as they are released
- Review/Refine existing specs



Questions?

BREAKOUT SESSION - ROUND 2

BREAKOUT 1:
Standards Committee -
New Standards

Dunes Ballroom (here!)



Erica Griffitt
Senior Software Engineer
Staples Promo

BREAKOUT 2:
Introduction to
PromoStandards

Sandpiper (3rd Floor)



Steve Luisser
VP of Research
Essent

BREAKOUT SESSION - ROUND 2

BREAKOUT 1:
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Erica Griffitt
Senior Software Engineer
Staples Promo

STANDARDS COMMITTEE



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Erick Leon
Hit Promotional
Products

Pablo Hanke
OrderMyGear

Steve Luisser
Essent



Key Projects This Year

Website Updates

REST service design approach

Event Subscriptions

Product Data 3.0

WSV

https://soapvalidator.promostandards.org

Web Service Validator

Import Export with Credentials

Service: Select... Version: ... Operation: Select Operation...

Endpoint URL: https://...

Request Body Format

Validate Request Validate Response

Validation Results
No validation performed yet.

AI Explanation (Trial Feature and may be removed or changed in future updates) Ask AI to Explain

2:20 PM
1/22/2026



From SOAP to REST – Really!

Defining our general approach

- JWT credentialling
- Standard http service response handling
- Paging
- Structure of paths
- Enumerations

Standardizing the Standards

```
[ {  
  "enumeration": "VariantAttribute",  
  "types": [  
    {  
      "type": "VariantAttribute",  
      "description": "This value describes what makes each part within a product unique. Multiple options can be assigned to a single part. Color and Size are the most common.",  
      "values": [  
        {  
          "value": "Color",  
          "description": "Color option for the part. For non-apparel products, this is the primary color of the part and is the differentiator between parts"  
        },  
        {  
          "value": "Size",  
          "description": "Size option for the part. For apparel products, the size and color are the differentiators between parts"  
        },  
        {  
          "value": "Shape",  
          "description": "The shape of the part. This is common for stickers and decals"  
        },  
        {  
          "value": "Scent",  
          "description": "The scent of the part, for example scented markers or candles"  
        },  
        {  
          "value": "Feature",  
          "description": "The specific part feature"  
        },  
        {  
          "value": "Flavor",  
          "description": "The flavor of the part"  
        }  
      ]  
    }  
  ]  
}
```

```
{  
  "enumeration": "UnitOfMeasure",  
  "types": [  
    {  
      "type": "Dimension",  
      "description": "Enumerated values for dimensional measurements",  
      "values": [  
        {  
          "value": "MM",  
          "description": "Millimeter"  
        },  
        {  
          "value": "CM",  
          "description": "Centimeter"  
        },  
        {  
          "value": "MR",  
          "description": "Meter"  
        },  
        {  
          "value": "IN",  
          "description": "Inch"  
        }  
      ]  
    }  
  ]  
}
```

Select a Filter to view PromoStandard Enumerations

Select Enumeration Filter:





Event Subscriptions (Webhooks)



Distributor

The Distributor registers for a subscription for a given event type and provides a URL to receive the event notifications.

Supplier

When the event occurs, the supplier sends notification to the Distributors registered endpoint

Distributor

The Distributor can still use the existing Supplier services to retrieve additional information about the event.

1. Create a Subscription

Use the `POST /{version}/subscription` endpoint to create a new subscription. You will need to use the credentials you created.

Example Request:

```
curl -X 'POST' \
  'http://localhost:8000/alpha/subscription' \
  -u 'your_username:your_password' \
  -H 'Content-Type: application/json' \
  -d '{
    "type": "webhook",
    "name": "My Order Status Subscription",
    "eventType": "order-status",
    "callbackUrl": "http://my-service.com/webhook",
    "secret": "a-very-strong-and-secret-key"
}'
```

2. Simulate an Event

To test your subscription, you can use the `/simulate-event` endpoint to trigger a webhook.

Example Request: This will trigger the `order-status` subscription created above.

```
curl -X 'POST' \
  'http://localhost:8000/simulate-event' \
  -u 'your_username:your_password' \
  -H 'Content-Type: application/json' \
  -d '{
    "eventType": "order-status",
    "targets": [
      {
        "id": "P012345",
        "type": "purchase-order"
      }
    ]
}'
```

Why oAuth 2.0?

Traditional Authentication (Basic Auth / Password-Based)

- Sends a **username and password with every request**.
- If intercepted, credentials give full access.
- Can be slower, because each call requires reauthorizing.
- Harder to manage securely across multiple services or integrations.

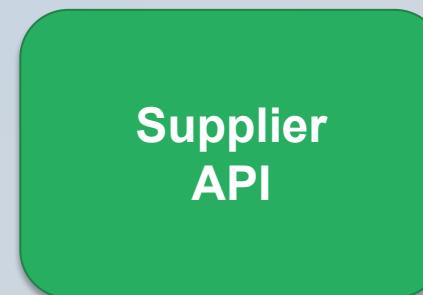
JWT Credentialing

- Uses a **temporary digital token** instead of sending usernames and passwords repeatedly.
- OAuth 2.0 Client Credentials flow with JSON Web Tokens (JWT) - the proven standard for M2M APIs
- Token is **time-limited** and automatically expires.
- Passwords no longer included in request body.
- Makes API communication **faster and more efficient**.

How It Works - OAuth 2.0 Client Credentials Flow



1. **Send credentials →**
(client_id + client_secret)
2. ← **Receive JWT access token**
3. **Call API with token →**
(Authorization: Bearer)
4. ← **Get data**



Implementation & Next Steps

Reference Implementation Available

- Full demo in .NET 8 & Python FastAPI with both custom-built auth services and Auth0 at bitbucket.org/promostandards/rest-authorization-demo

For Distributors

- Simple HTTP POST for tokens - use any OAuth 2.0 library or build it yourself in minutes

For Suppliers

- Use libraries (e.g. C#: Microsoft.AspNetCore.Authentication, PHP: league/oauth2-server, Node.js: node-oauth2-server) or managed services (e.g. Auth0, Okta, Azure AD)

Migration Path

- Suppliers can initially map existing usernames/passwords to `client_id/client_secret` for seamless transition (migrate to high-entropy secrets within 12 months)

Timeline

- Proposal v0.2 (Draft) - Ready for industry review and feedback



Swagger UI x +

https://productdata3.promostandards.org/swagger/index.html

Swagger. Supported by SMARTBEAR

Select a definition 3.0

ProductData.Api 3.0 OAS 3.0

/swagger/v3/swagger.json

Provides Product Information

Terms of service
PromoStandards - Website
Send email to PromoStandards
End User Licensing Agreement

ProductData.Api

GET /promostandards/product-data Gets a list of products

GET /promostandards/product-data/{productId} Gets the details for a product

Schemas

GetProductDetailResponse >

GetProductsResponse >

PagedResponse >

... (truncated)

Product Data 3.0

Get Products

Sample Response

```
{  
  "products": [  
    {  
      "productId": "Shirt100"  
    },  
    {  
      "productId": "Shirt200",  
      "partId": "Shirt200-Red"  
    },  
    {  
      "productId": "Shirt300",  
      "partId": "Shirt300-Blue"  
    }  
],  
  "paging": {  
    "page": 1,  
    "pageSize": 100,  
    "totalRecords": 3,  

```

Swagger UI

https://productdatav3.promostandards.org/swagger/index.html

GET /promostandards/product-data/{productId} Gets the details for a product

This function will provide the detail product data based on a specific productId or any additional optional subset filtering provided at the request.

Parameters

Try it out

Name	Description
productId * required	string (path) productId
countryCode * required	string (query) Default value : US US
currencyCode * required	string (query) Default value : USD USD
customerNumber	string (query) customerNumber
partId	string (query) partId
colorName	string (query) colorName

Get Product Details

Product Data 3.0

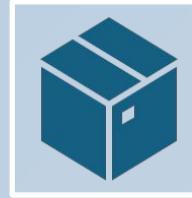
```
{  
  "product": {  
    "productId": "2000",  
    "name": "Shirt 1000",  
    "description": "This is the description",  
    "businessLine": "The Best Line",  
    "brand": "PromoStandards",  
    "manufacturer": "Gildan",  
    "manufacturerProductId": "2000",  
    "primaryImageUrl":  
      "https://www.promostandards.com/2000.jpg",  
    "complianceInfoAvailable": false,  
    "sellBlank": false,  
    "sellDecorated": true,  
    "sellPrintOnDemand": true,  
    "unionMade": false,  
    "marketingPoints": [  
  ]  
}
```

```
"parts": [  
  {  
    "partId": "2000-Red-S",  
    "manufacturerPartNumber": "2000_RED_SMALL",  
    "apparelSize": {  
      "apparelStyle": "unisex",  
      "labelSize": "s"  
    },  
    "primaryColor": {  
      "name": "Red",  
      "colorFamily": "Red",  
      "hex": "#F93822",  
      "approximatePms": "Red 032 C"  
    },  
    "variantAttributes": [  
      {  
        "optionType": "flavor",  
        "value": "Vanilla",  
        "sequence": 1  
      }  
    ],  
    "isPrimaryPart": true,  
    "primaryMaterial": "100% Cotton",  
    "countryOfOrigin": "US",  
    "leadTime": 5,  
    "isHazmat": false,  
    "isManufacturedItem": false,  
    "isBuyToOrder": false,  
    "isCloseout": false  
  }  
],  
}
```

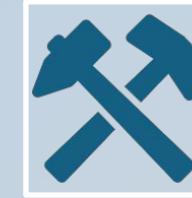
What's Next



Complete Product
Data



Inventory 3.0 to
align with Product



Begin Work on PPC



Purchase Order
based on new PPC



Feedback

<https://app.sli.do/event/5SUBBcq8iuQejoXzUAZ1JH>



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Founder
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Grace Schettler
Senior VP of Sales
Chippy



Mykayla Goodwin
VP of Strategy & Marketing
OMG



Rob Watson
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CEO



Mykayla Goodwin
Order My Gear
VP of Strategy



Grace Schettler
Chippy
SVP of Sales





PromoStandards Origin

Distributors

Service Providers

PromoStandards

Standardized Communication Layer

Suppliers

Supplierators



PromoStandards Today

Distributors

Service Providers

PromoStandards

Standardized Communication Layer

Suppliers

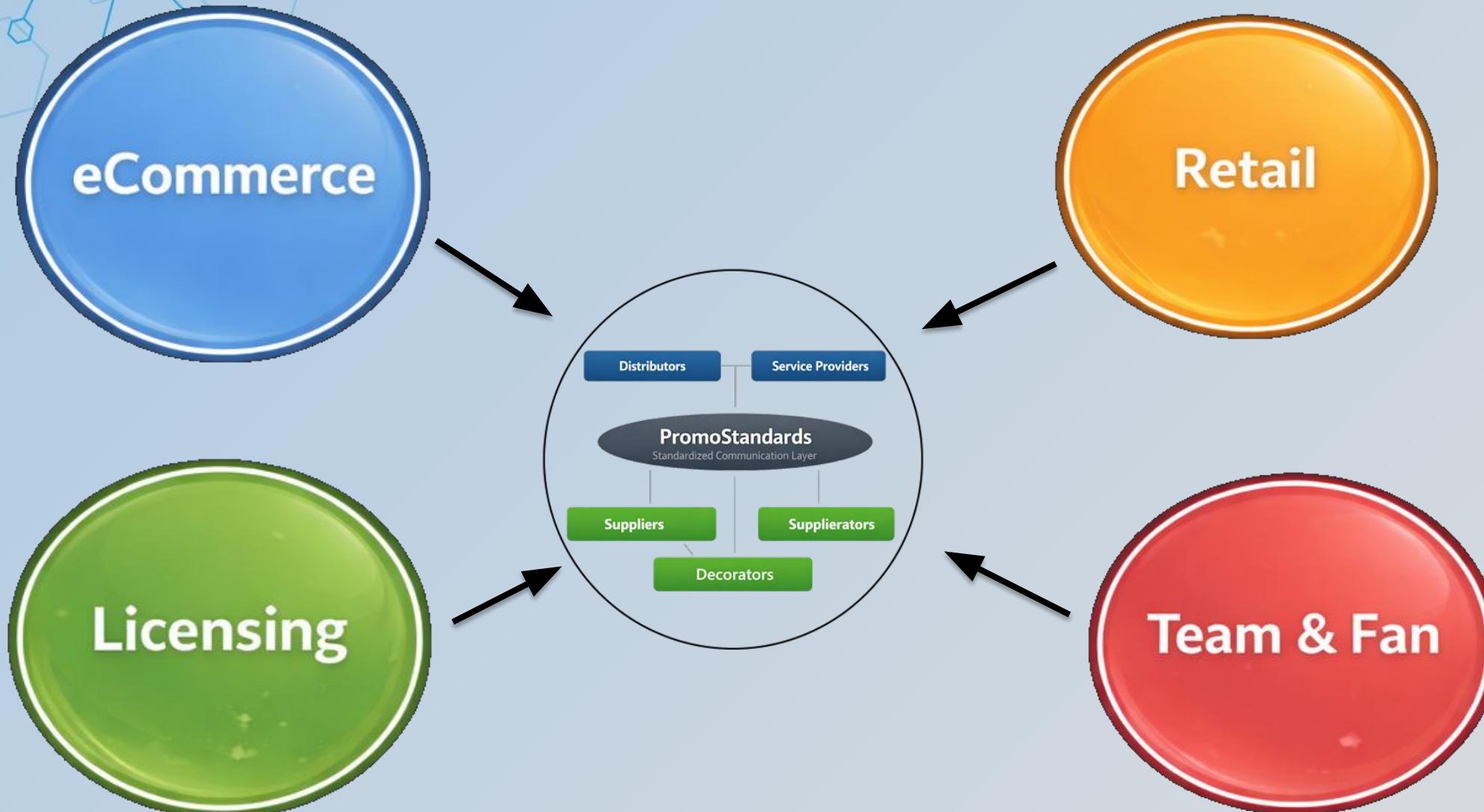
Supplierators

Decorators

“\$27B Promo Industry”



The Real \$113B Industry





**PromoStandards must move as fast
as the industry is moving.**



PromoStandards

TECH SUMMIT



QUESTIONS

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Show  down[®]
DISPLAYS

BREAKOUT SESSION - ROUND 3

BREAKOUT 1:
AI Tools for Developers
Dunes Ballroom (here!)



Raul Rodriguez
CEO
Merch.ai

BREAKOUT 2:
RevOps & PromoStandards
Sandpiper Room (3rd Floor)



RJ Hagel
Founder
The Promo CMO



Mika Kayt
Founder & CEO
Outgag



BREAKOUT SESSION - ROUND 3

BREAKOUT 1:
AI Tools for Developers
Dunes Ballroom (here!)



Raul Rodriguez
CEO
Merch.ai



AI Tools for Development and Testing

Raul Rodriguez (CEO, Merch.ai)

OJ Castellanos (CAIO, Merch.ai)

Ann Olson (CTO, Showdown Displays)



Agenda

- Development tool comparison
- Advanced tips and tricks
- QA tools
- Context + hallucinations
- Case study: pushing AI changes across an organization
- Q&A;



Tool Snapshot (One-liners)

- ⌘ Claude Code — Terminal-first, agentic coding environment
- ⌘ Cursor — AI-first VS Code fork with deep editor integration
- ⌘ OpenCode — Open-source, provider-agnostic terminal agent
- ⌘ GitHub Copilot — AI pair programmer with tight GitHub workflow integration
- ⌘ Gemini CLI — Open-source terminal agent built for very large context



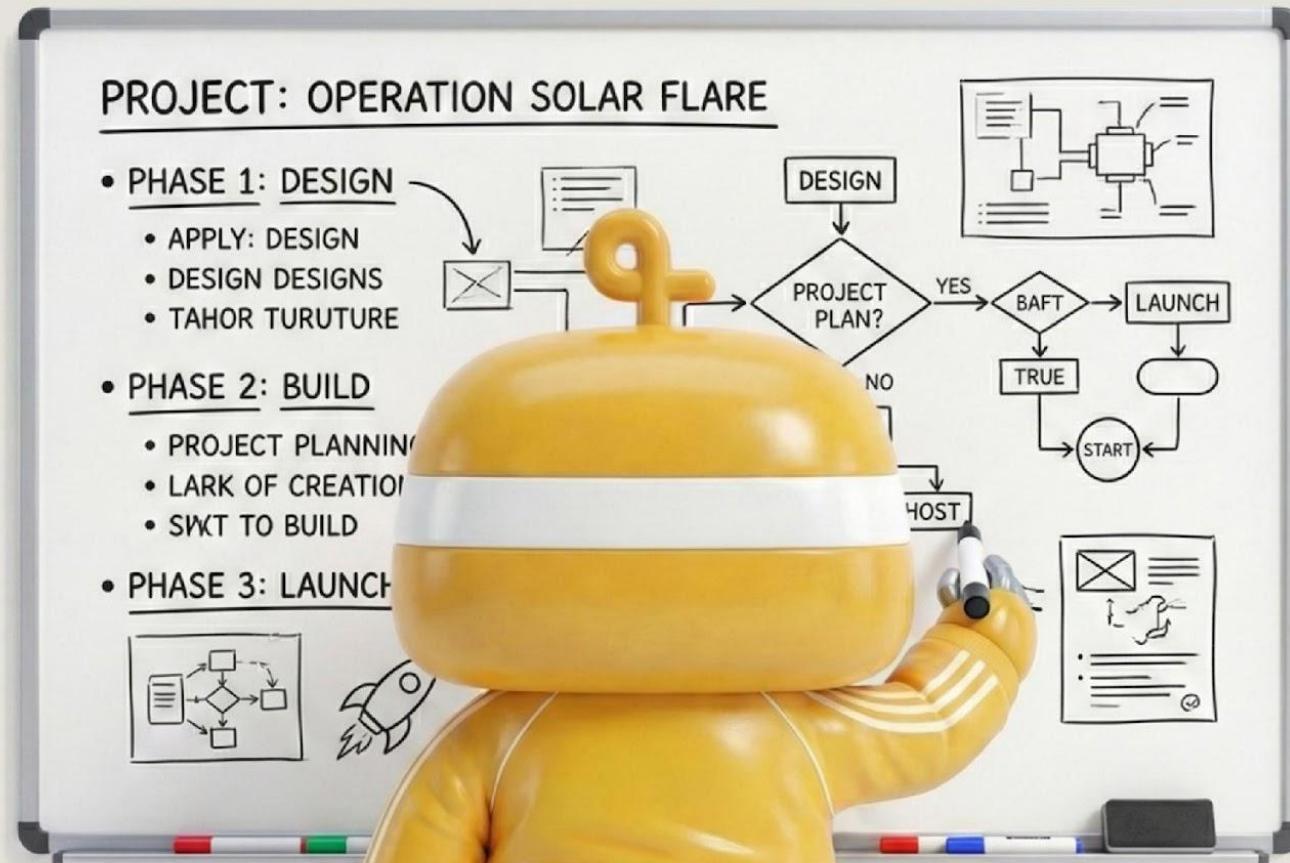
Best-Fit Use Cases

- Claude Code — Complex refactors, CI/CD, large codebases
- Cursor — Fast inline edits, visual diffs, tab completions
- OpenCode — Cost control, custom providers, embedded tooling
- GitHub Copilot — Strong GitHub integration, easy on-ramp
- Gemini CLI — Huge context windows, Google ecosystem workflows



Pro Tips (Core Habits)

- Plan before you code (the highest ROI habit)
- Reset context aggressively (/clear, /compact)
- Create a rules file early (CLAUDE.md / .cursorrules)
- Point the AI at existing patterns in your repo
- Use quick command execution shortcuts (ex: ! for bash)



Pro Tips: Plan Mode

- Use plan mode for changes touching 3+ files
- Ask for step-by-step reasoning for verifiable plans
- Save strong plans as templates (design □ steps □ risks □ tests)



Pro Tips: Skills (Reusable Workflows)

- ▀ Offload heavy analysis into separate context
- ▀ Define strict permissions for “read-only” skills
- ▀ Use skills + hooks for scoped automation
- ▀ Prefer running scripts over pasting huge docs



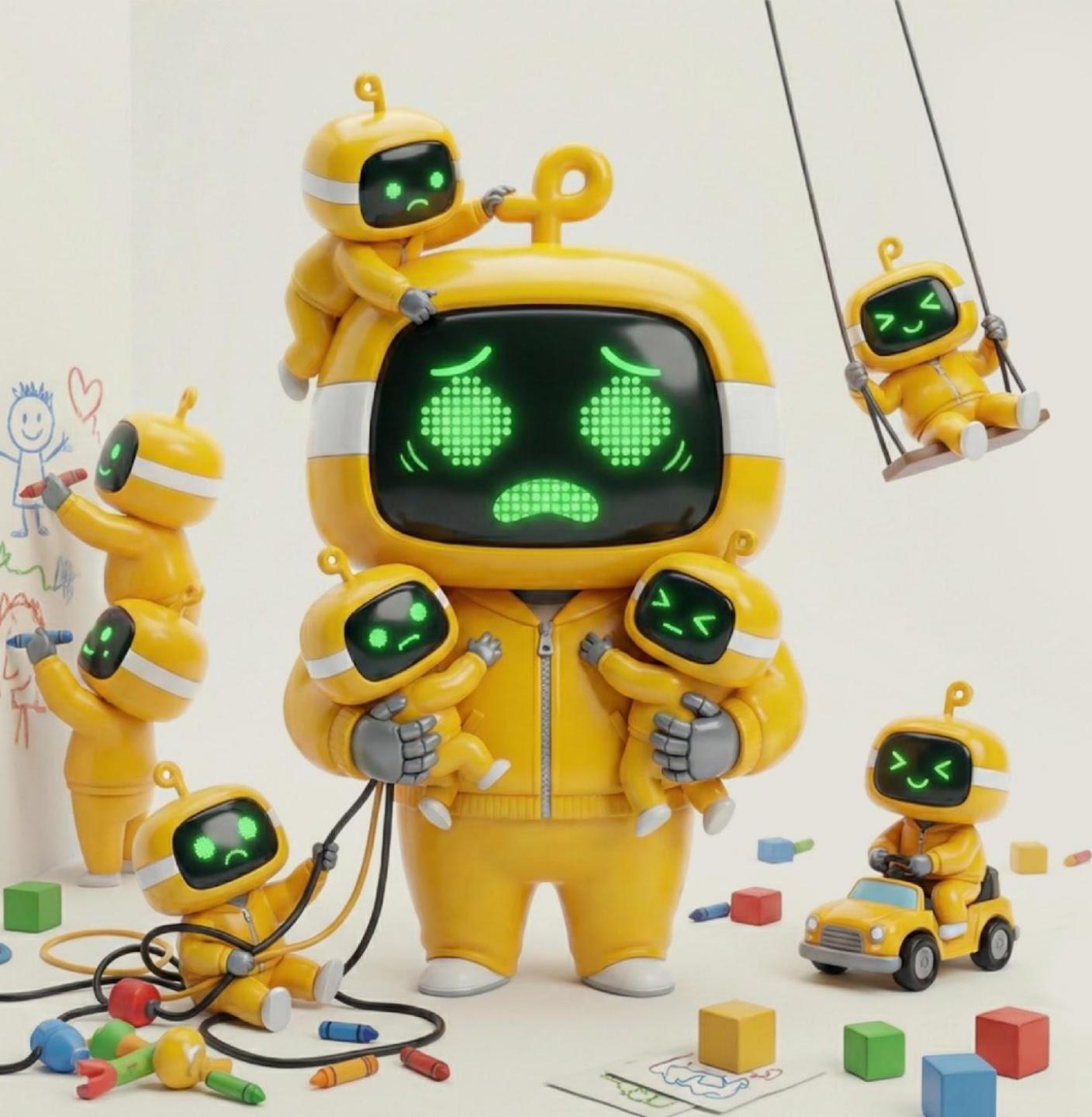
Pro Tips: Hooks (Guardrails)

- Chain PreToolUse hooks: security □ lint □ approval
- Use PostToolUse hooks for auto-commits
- Enrich prompts on submission (add context/constraints)
- Block dangerous commands (ex: rm -rf)



Pro Tips: Subagents

- Use parallel subagents for research (cap at ~3)
- Pipeline roles: explore □ plan □ implement
- Use cheaper models for exploration; stronger for code
- Isolate risky operations in read-only subagents



Common Pitfalls

- ✗ Vague prompts □ define testable goals
- ✗ Context blow-up □ clear/compact early
- ✗ No rules file □ write one on day 1
- ✗ Big changes without tests □ ship incrementally
- ✗ Auto-approving in production □ never skip review
- ✗ Fighting the AI □ redirect with constraints



QA Tools (Overview)

TestCraft

- Strong for page-level verification
- Weak at cross-page E2E flows

TestGrid

- “Unified Test OS” (devices + automation)
- Free tier limits: single-user, no parallel



QA Tools (Continued)

Codeium (Future)

- Shift-left testing, security signals
- Heavy setup for QA teams

Kusho

- Finds “hidden” bugs, stress-testing
- Prevents crashes under load

testRigor

- Good for long user paths
- Resilient to UI/CSS changes



More Information

merch.ai/ai-dev-tools



WHY A.I. GUESSES

and how context
changes everything



Why Hallucinations Happen

Hallucinations happen when the model is missing context. Faced with uncertainty, it doesn't stop; it fills in the gaps with the most plausible answer it can generate.

Think of it like a student answering a multiple-choice question with four options. If they guess, they have a 25% chance of being right. If they write "I don't know," that's a guaranteed zero. LLMs are trained under a similar incentive: a confident guess is statistically better than silence.

So when context is incomplete, guessing isn't a bug. It's the rational behavior of the system.



Garbage In, Confidence Out

Hallucinations often come from uneven or low-quality inputs, not from the model itself.

It's like a salesperson handed a torn-up price sheet. Some numbers are clear, others are missing, and a few columns are out of order. The customer still wants a quote, so the salesperson pieces it together and gives their best estimate, confidently, but not fully sure.

LLMs read information linearly and can't inherently tell which parts of the input are trustworthy. When data is fragmented or poorly structured, the model reconstructs a plausible answer from partial information. The result sounds authoritative, even when the source isn't.

Common sources

- Messy PDFs and flattened tables
- Scrapped web pages with mixed content
- Supplier data with inconsistent quality



The Five-Finger Problem

Generative AI is fundamentally a pattern-recognition system. When a pattern is strong enough, it becomes the default shape of reality for the model.

Think about hands in AI-generated images. Early on, six fingers was a joke because the pattern was weak and inconsistent. Now it is almost impossible to get six fingers, even if you ask for it, because the model has learned that a human hand has five fingers with overwhelming confidence.

The same thing happens with language, structure, and concepts. Once a pattern is reinforced strongly enough, the model will resist deviating from it. This is why some errors disappear over time, but also why breaking a dominant assumption can be surprisingly difficult.

Polydactyly is a real medical term for having more than five fingers. When you ask for “a hand with six fingers,” the model fights you because it conflicts with a very strong learned pattern. But when you specify polydactyly, you are giving the model a valid exception anchored in reality.

That single word reframes the request from “break the rule” to “apply a different, known pattern.”



The Power of Good Context

People often say generative AI is taking the soul out of creativity. You see it when everything starts to feel cookie-cutter, like mass-produced food instead of real culinary art.

That happens when models are given weak context. They fall back to the most common patterns, which is why writing, images, and videos all start to look the same. But with strong context, clear constraints, and a defined style, generative AI does not replace creativity. It refines it.

Think of it like a skilled kitchen, not a vending machine. The taste, intent, and recipe come from you. The model just helps with prep, consistency, and speed. With good context, generative AI does not flatten originality. It makes quality repeatable.



Style Guide Example & Why It Works

This is a simplified version of my style guide. It gives the model behavioral constraints instead of vague direction.

My core style rules

- Short, punchy sentences. Fragments allowed.
- Logic first. Call out broken reasoning.
- Concise by default. One tight paragraph.
- Never invent facts or add fake detail.
- If context is missing, say so. No silent guessing.

Without these rules, the model defaults to average patterns, which is why outputs feel generic and interchangeable. With them, ambiguity is removed and the model stops guessing. It executes in a defined voice.

Without style guide

“We are excited to announce the launch of our new feature, which will help teams work more efficiently and drive better outcomes.”



With style guide applied

“Launching a new feature! This one deals with the bottleneck issue. Faster workflows, less noise, more output! LFG!!!”





AI Application Adoption

A Case Study in Change Management

Ann Olson, CTO

THE THREE PLAYERS IN OUR STORY

THE IT DEPARTMENT

A critical team designed to respond efficiently, but removed from the daily rhythm of the business.

THE 2,000+ DAILY PURCHASE ORDERS

A nonstop stream of customer-written emails. No templates, no consistency, every one a puzzle.

THE CUSTOMER-FIRST BRAND

A company obsessed with being easy to work with. So committed to service, they refuse to force customers into a rigid form.

THE SPARK

One Question That Changed Everything

“What problems can
we solve using AI?”



THE FIRST CHANGE

A New Mindset

“I just didn’t think AI could handle the chaos our customers send us”

“My worry was simple: even if it worked once, could it work every day?”

“I just kept thinking of all the ways this could break!”

“I wanted to be open-minded...but, I honestly didn’t know what to expect”

“Are we even allowed to do it this way?”

“I didn’t want a fix. I wanted to see what was possible.”

THE SECOND CHANGE

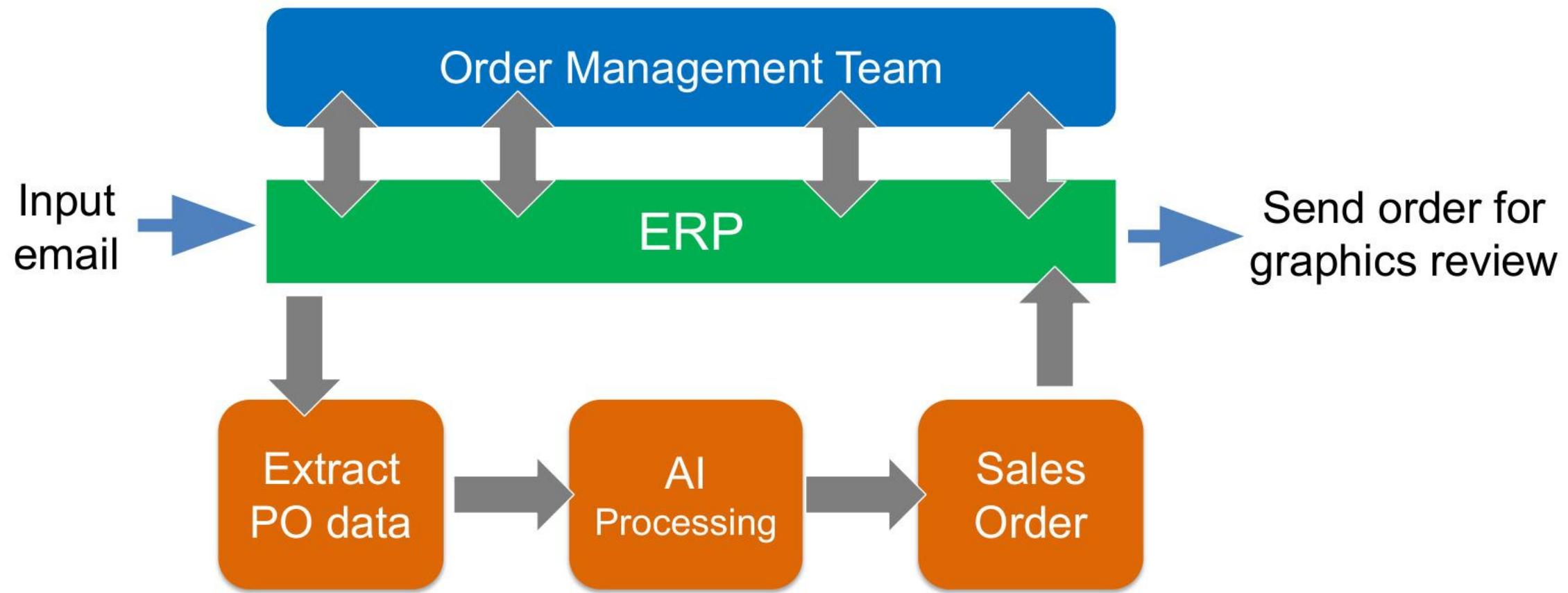
The Goal is Not 100% Success

PARAMETERS

- Improve productivity
- Goal is NOT 100% success
- Humans can still be in the loop
- Difficult edge cases can be done by Humans

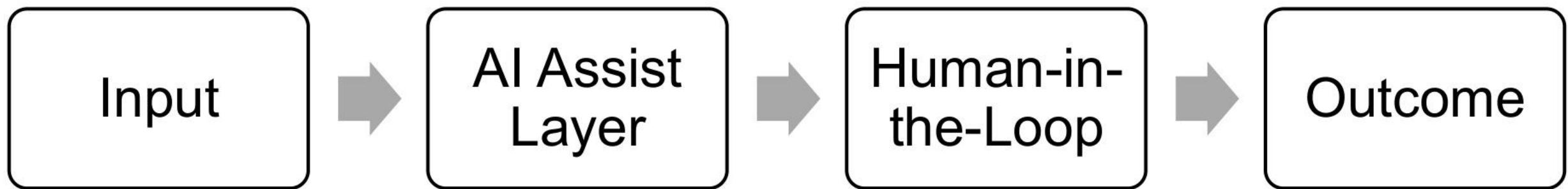
THE SECOND CHANGE

The Goal is Not 100% Success



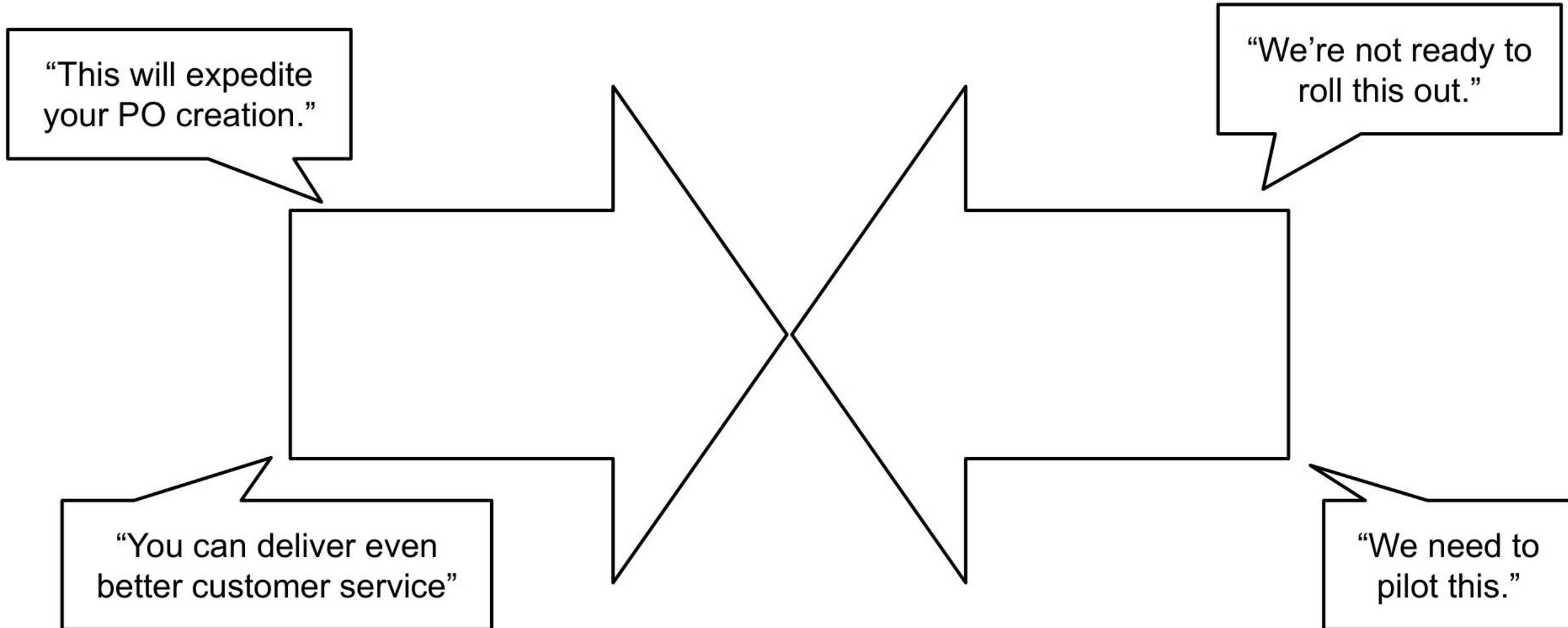
THE AI SOLUTION

From Chaos to Flow: The Ai-Assisted Process



THE AI ADOPTION ROADBLOCK

When the Technology Was Ready But the Organization Wasn't



THE REAL CHANGE

From Fixers to Strategic Partners: What else can we re-invent?



AI adoption happens *with* users, not *to* them.



Thank you!

aolson@showdowndisplays.com

DAY 3: TUESDAY FEBRUARY 3, 2026

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Monday Morning/Afternoon Breaks



Tuesday Morning/Afternoon Breaks



Wednesday Morning Break

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S&S
ACTIVEWEAR

AI & CYBERSECURITY LEGAL TRENDS



Stephen Reynolds
CISSP, CIPP/US Partner
McDermott Will & Emery LLP

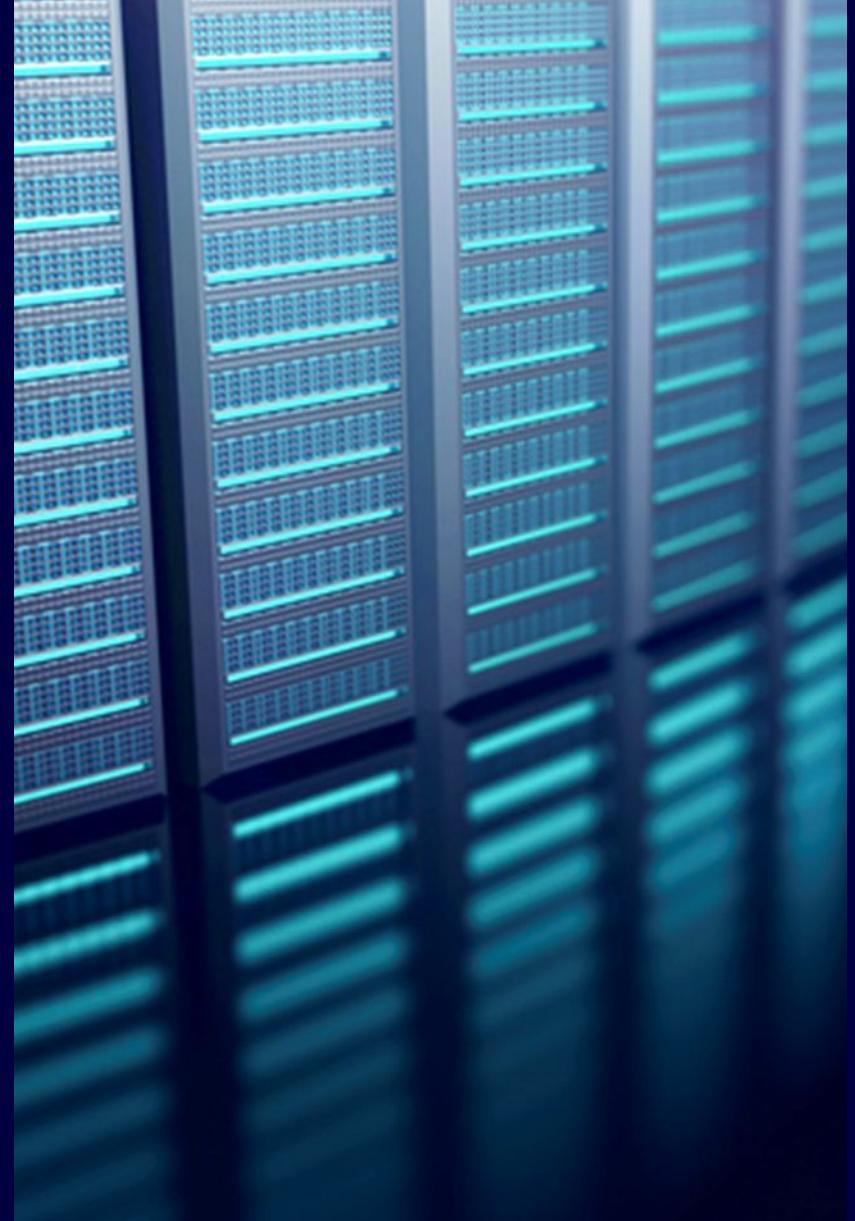


AI & Cybersecurity Legal Trends

PromoStandards Tech Summit Keynote 2026

Stephen Reynolds, CISSP, CIPP/US
Partner, McDermott Will & Schulte

Cybersecurity Updates



Speaker



Stephen Reynolds, CISSP, CIPP/US

- Partner
- Chicago
- +1 312 984 3398
- sreynolds@mcdermottlaw.com

Change Healthcare Ransomware Attack

“On February 12, criminals used compromised credentials to remotely access a Change Healthcare Citrix portal, an application used to enable remote access to desktops. The portal did not have multi-factor authentication. Once the threat actor gained access, they moved laterally within the systems in more sophisticated ways and exfiltrated data. Ransomware was deployed nine days later.”

Testimony of Andrew Witty, Chief Executive Officer, UnitedHealth Group, Before the House Energy and Commerce Committee, Subcommittee on Oversight and Investigations, “Examining the Change Healthcare Cyberattack”

May 1, 2024



Change Healthcare – RansomHub Ransomware Attack



Change HealthCare - OPTUM Group - United HealthCare Group - FOR SALE
=====

The data is now for sale. Anyone interested in the purchase should contact RansomHub. The data is for tens of insurance companies including and not limited to:

- Medicare
- Tricare
- CVS-CareMark
- Loomis
- Davis Vision
- Health Net
- MetLife
- Teachers Health Trust
- Tens of insurance companies

Data contains:

- Active US military/navy personnel PII/PHI
- Medical records (PHI)
- Dental records
- Payments information
- Claims information
- Patients PII/PHI including Phone numbers/addresses/SSN/emails/etc...
- thousand of source code files for Change Health solutions
- Insurance records
- And many more

Change Health and United Health processing of sensitive data for all of these companies is just something unbelievable. For most US individuals out there doubting us , we probably have your personal data.

Affected insurance providers , can contact us to prevent leaking of their own data and removing from the sale.

Employee Recruiting– LAPSUS\$ Example

LAPSUS\$ Reply

We recruit employees/insider at the following!!!!

- Any company providing Telecommunications (Claro, Telefonica, ATT, and other similar)
- Large software/gaming corporations (Microsoft, Apple, EA, IBM, and other similar)
- Callcenter/BPM (Atento, Teleperformance, and other similar)
- Server hosts (OVH, Locaweb, and other similar)

TO NOTE: WE ARE NOT LOOKING FOR DATA, WE ARE LOOKING FOR THE EMPLOYEE TO PROVIDE US A VPN OR CITRIX TO THE NETWORK, or some anydesk

If you are not sure if you are needed then send a DM and we will respond!!!!

If you are not a employee here but have access such as VPN or VDI then we are still interested!!

You will be paid if you would like. Contact us to discuss that

@lapsusjobs 837 37.2K 2:37 PM

A Model Employee

John M. Carter



North Korean IT Workers & Remote US IT Jobs

JOHN M. CARTER

New York, NY - (555) 123-4567 - john.carter@email.com - LinkedIn: linkedin.com/in/johncarter -

GitHub: [johncartertech](https://github.com/johncartertech)

PROFESSIONAL SUMMARY

Detail-oriented IT professional with over 8 years of experience in enterprise IT support, cloud infrastructure, and cybersecurity. Proven ability to implement and manage IT systems that align with business objectives. Strong communicator with a strategic mindset, well-versed in supporting fast-paced, data-driven environments like real estate investment firms.

TECHNICAL SKILLS

- Networking & Infrastructure: Cisco, Fortinet, Windows Server, VMware, Azure
- Cloud Technologies: AWS, Microsoft Azure, Google Cloud
- Cybersecurity: SIEM, Firewalls, Endpoint Protection, SOC Support
- Programming/Scripting: Python, PowerShell, SQL
- Other Tools: Jira, ServiceNow, Active Directory, Microsoft 365, SharePoint

EDUCATION

B.S. in Information Technology

University of Texas at Austin - Austin, TX | Graduated: May 2015

CERTIFICATIONS

- CompTIA Security+
- Microsoft Certified: Azure Administrator Associate
- Cisco Certified Network Associate (CCNA)

PROFESSIONAL EXPERIENCE

Senior IT Support Specialist

Tanner Global Realty Advisors - New York, NY | May 2021 - Present

- Provide Tier 2/3 technical support to over 300 employees across multiple real estate office locations.
- Led the migration of internal infrastructure to Microsoft Azure, improving reliability and reducing costs by 18%.
- Implemented new endpoint protection protocols that reduced phishing incidents by 40%.

North Korean IT Workers & Remote US IT Jobs

 ZachXBT 
@zachxbt

1/ My recent investigation uncovered more than \$16.58M in payments since January 1, 2025 or \$2.76M per month has been sent to North Korean IT workers hired as developers at various projects & companies.

To put this in perspective payments range from \$3K-8K per month meaning they have infiltrated 345 jobs on the low end or 920 jobs on the high end.

PRESS RELEASE

Justice Department Announces Coordinated, Nationwide Actions to Combat North Korean Remote Information Technology Workers' Illicit Revenue Generation Schemes

8:35 AM · Jul 2, 2025 · 876K Views

Monday, June 30, 2025

For Immediate Release

 **Public Service Announcement**
FEDERAL BUREAU OF INVESTIGATION



Alert Number: I-012325-PSA
January 23, 2025

North Korean IT Workers Conducting Data Extortion

BI is providing an update to previously shared Republic of Korea (North Korea) Information awareness of their increasingly malicious activity. FBI is warning the public, private sector, and Korean IT workers' continued victimization of US- In addition to data extortion, FBI has observed North access to company networks to exfiltrate cyber-criminal activities, and conduct revenue- time.

PRESS RELEASE

Two North Korean Nationals and Three Facilitators Indicted for Multi-Year Fraudulent Remote Information Technology Worker Scheme that Generated Revenue for the Democratic People's Republic of Korea

Hackers, they're
just like us

“Amateurs hack computers,
professionals hack people.”

- *Some Hacker*

How are people hacked?

Hackers try to trick people into:

Running the hacker's malware

Handing over credentials to the hacker

Directly working for the hacker

A day in the life of a hacker – Conti Example

ATTRITION

Each Conti employee was assigned a specific 5-day workweek, and employee schedules were staggered so that some number of staff was always on hand 24/7 to address technical problems with the botnet, or to respond to ransom negotiations initiated by a victim organization.

A day in the life of a hacker – Conti Example

Like countless other organizations, Conti made its payroll on the 1st and 15th of each month, albeit in the form of Bitcoin deposits. Most employees were paid \$1,000 to \$2,000 monthly.

However, many employees used the Conti chat room to vent about working days on end without sleep or breaks, while upper managers ignored their repeated requests for time off.

A day in the life of a hacker – Conti Example

Indeed, the logs indicate that Conti struggled to maintain a steady number of programmers, testers and administrators in the face of mostly grueling and repetitive work that didn't pay very well (particularly in relation to the earnings of the group's top leadership). What's more, some of the group's top members were openly being approached to work for competing ransomware organizations, and the overall morale of the group seemed to fluctuate between paydays.

Think like a hacker



Think like a hacker

Asda criminals steal DVDs by posting them to themselves - from INSIDE the store

Staff forced to remove padded envelopes from shelves in bid to crack down on scam of thefts without leaving the premises



Generative AI



Fun with Generative AI

- Midjourney Prompt – real couple from New York



Fun with Generative AI

- Midjourney Prompt –
real couple from
California



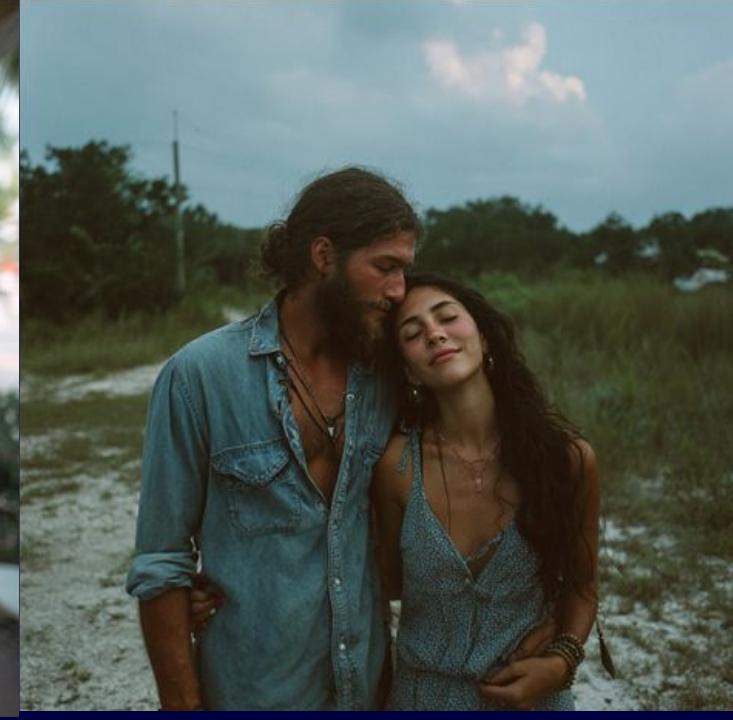
Fun with Generative AI

- Midjourney Prompt –
real couple from
Kentucky



Fun with Generative AI

- Midjourney Prompt –
real couple from Florida



Understanding AI

FALL 2025 FINAL EXAM

Data Security and Privacy Law (Tuesday 5:30pm-7:40pm; Room 235E)

Alexis Martinez, CIPP/US

Associate

Dentons LLP

alexis.martinez@dentons.com

Stephen Reynolds, CISSP, CIPP/US

Partner

McDermott Will & Schulte

sreynolds@mwe.com

1. As a highly successful in-house attorney, you represent a non-profit public university in California that recently implemented new student-success software. The software uses cookies, session replay scripts, and third-party analytics tools to track how students interact with online course materials. The parents of many of your university's students are overjoyed at the possibility of having easy access to their children's grades, in order to help keep their scholarships and ensure that their children remain at the top of the class. A student's parent calls the registrar demanding access to information showing how often their child logs into the system, which pages they view, and how long they spend on each assignment.
 - a. Which federal and state laws govern the disclosure of the student's behavioral and academic data, and do those laws allow disclosure to the parent?
 - b. Do any wiretapping or eavesdropping statutes apply to the university's use of session replay tools? Explain why or why not.

Understanding AI

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 - a. Which federal and state laws govern the disclosure of the student's behavioral and academic data, and do those laws allow disclosure to the parent?
 - b. Do any wiretapping or eavesdropping statutes apply to the university's use of session replay tools? Explain why or why not.

Understanding AI

California state privacy laws also apply. The most relevant is the California Consumer Privacy Act (CCPA)/CPRA, but personal information collected by public universities in their role as educational institutions is largely exempt from CCPA where it is already governed by FERPA. Thus, FERPA remains the controlling law. California's constitutional right to privacy and the Information Practices Act (IPA) reinforce the university's obligation to restrict disclosure of personally identifiable student data, but they do not create an independent right to parental access.

Accordingly, the university must decline the parent's request absent FERPA-compliant authorization from the student. As one might say, *insérer des mots en français: le parent n'a pas le droit d'accéder à ces données sans le consentement de l'étudiant.*

Understanding AI

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Understanding AI

French - detected ↔ English

insérer des mots en français: le parent n'a pas le droit d'accéder à ces données sans le consentement de l'étudiant.

Did you mean: insérer des mots en franç...

Insert words in French: The parent does not have the right to access this data without the student's consent.

What LLMS are not

- LLMs are not a search engine.
- They are not specifically trained.
- They do not “know” anything about specific documents, projects, or marketing contexts.
- They are probability-based—calculating the probability of what should come next in a string of characters.
- They may create incorrect or misleading information based on patterns in training data.

Generative AI Use Cases for the Promo Industry

- Draft product copy
- Assist with mockups
- Generate personalized sales proposals
- Smarter order & supplier workflows
- Provide customer support
- Draft trend and demand insights

Prompt Engineering 101

R-T-F

Act as a

[ROLE]

Create a

[TASK]

Show as

[FORMAT]

- **Role:** Define the role of the AI as a sales representative
- **Task:** Clearly describe the task, such as drafting a presentation deck.
- **Format:** Specify the format, like a slideshow or a bullet-point summary of the slide content.

Prompt Engineering 101

R-I-S-E

Act as a

Describe

Ask for output

Act as a

[ROLE]

[INPUT]

[STEPS]

[EXPECTATIONS]

- **Role:** Define the role of the AI.
- **Input:** Provide the necessary input data or documents.
- **Steps:** Specify the steps the AI should follow.
- **Expectations:** Describe the expected outcome.

Prompt Engineering 101

B-A-B

Explain problem [BEFORE]

State outcome [AFTER]

Ask for [BRIDGE]

- **Before:** Explain the current problem.
- **After:** State the desired outcome.
- **Bridge:** Ask for the steps or advice to bridge the gap.

LLM Prompt Ideas

- A little less fluffy.
- Convert [X] into [Y].
- Check for typos: [insert content].
- How can I represent this visually?
- More direct, casual, yet professional.
- Help me brainstorm ideas for [topic].

LLM Prompt Ideas

- What are the key differences between [X] and [Y]?
- That's too tech bro-y. Try again.
[ChatGPT/EdisonGPT-specific].
- How well does [content X] match with [Y requirements].
- Identify as many potential solutions as you can for [problem].
- Can you remove the formatting and show me only [Y content]?

LLM Prompt Ideas

- How can I write this more clearly? [insert content].
- Summarize this and highlight the three most important takeaways.
- [Braindump]. Can you organize and structure this, and pull out the themes?
- [Describe Task X]. Tell me what information you need to accomplish this task.
- Draft a response to this email without including “I hope this email finds you well.”

Tips for Effective Prompt Engineering

1. **Be Specific:** Always define the role, task, and format clearly to ensure precise outputs.
2. **Use Industry Terminology:** Incorporate appropriate industry terms to better align AI responses with your expectations.
3. **Iterate and Refine:** Continuously refine prompts based on outputs received to improve accuracy and relevance.
4. **Leverage Examples:** Provide examples to guide the AI in producing more accurate and contextually appropriate results.
5. **Set Expectations:** Clearly state your expectations to guide the AI in delivering useful outputs.



Midjourney Prompt: an enlightened and entertained group of racially and gender diverse professionals laughing at farm animals and bears

Contact
sreynolds@mcdermottlaw.com

Thank you



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**TUESDAY
BREAK
SPONSOR**



TECH SUMMIT



AI IN PROMO - EMERGING TECHNOLOGIES AND ADVANCED USE CASES



David Lindley
Chief Technology Officer
Stablein Solutions

AI in Promo

Intro - Self

Professional Experience

- 1yr - CTO, Stablein Solutions
- 8yrs - VP of Data Products @ Compass Group North America (F500 Hospitality)
 - Delivered Data Science projects to Google, Microsoft, Netflix and many more.
 - Lead team of 60+ developers, data scientists, and data engineers.
- 2yrs - Supply Chain Automation (Flooring industry)
- 2yrs - eCommerce (Marine Industry)
- Masters in Business Analytics & Information System Design (USF)
- Bachelors in Derivative Finance & Economics (UC)

About me

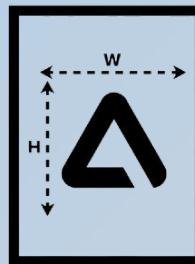
- Life long technologist and software developer
- Avid surfer, chess player, and bird watcher
- From Christchurch, New Zealand



Stablein Solutions



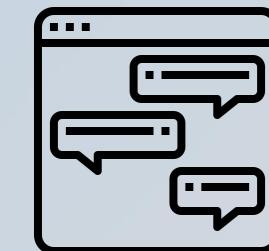
>2k POs / Day



>1.5k Proofs / Day



>300k Logos Analyzed



Live Chat

AI Solutions and process automation partners.



Agenda

Opportunities (10min)

AI Impact in Promo

Models (15min)

How to make smart choices, and know when to fine-tune.

System Design (20min)

Building AI for scale and resiliency

Q&A (Open Time)

Bring your questions!



AI Opportunities

Reducing friction across your supply chain



Promotional Product Activities - Distributors

Pre-sales

Sales & Client Management

Product & Supplier Coordination

Catalog Management

Artwork & Proofing

eCommerce

Post-Sales

Production & Logistics oversight

Billing & Accounting

Post-sales support

Proof Reviews

Day-to-day

Email Triage & Coordination

Strategic Growth Activities

Supplier Management

Hiring and Training



Promotional Product Activities - Suppliers

Pre-sales

Product Design & Development

Pricing Strategy

Inventory Planning

Distributor Support

Post-Sales

Order Intake

Artwork Proofing

Manufacturing & Decoration

Shipping

Day-to-day

Product Sourcing

Production Scheduling

Inventory Management

Equipment Maintenance



AI Opportunities in Promo

- Many specialized activities requiring expertise
- Change of hands = friction = delays

- AI reduces time required to complete these activities
- AI allows you to explore opportunities that historically would require teams.
- AI can perform many tasks at human-level accuracy, and it's getting better rapidly.



Model Selection in Times of Change

Keeping up with the evolution, while avoiding the hype.



2025 in review

February 2025

OpenAI makes 'deep research' available to public users for up-to-date complex research tasks.

August 2025

Nano Banana produces photo-realistic images from multi-modal inputs.

Early 2025

Most flagship providers release 'thinking' models following in OpenAI's o1-preview late 2024 release.

Mid 2025

Anthropic releases MCP to standardize tool-use for AI systems

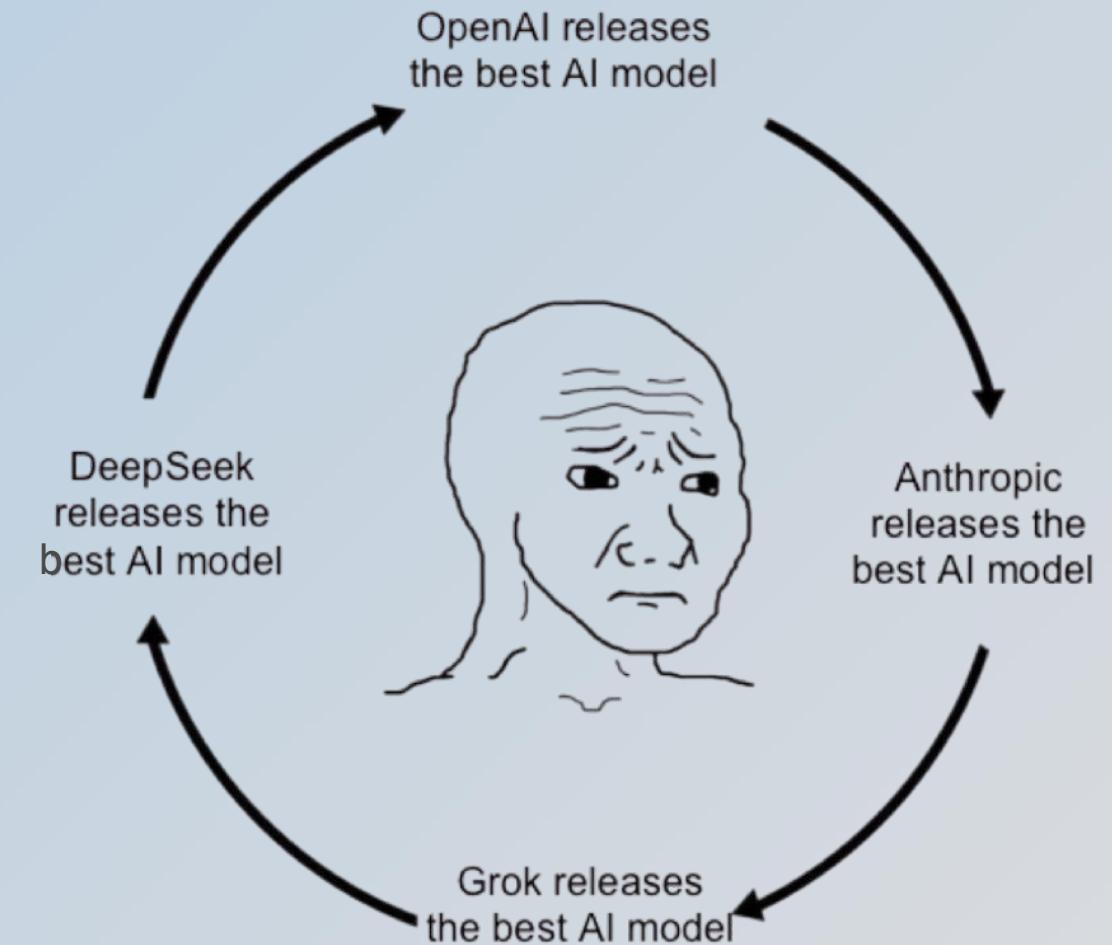
Late 2025

Most flagship providers now offering >1M context windows, research models >100M.

The 'best' model for your use-case likely changed several times in 2025.

The Challenge:

- Model capabilities are advancing rapidly.
- New model releases make new problems easier, or possible to solve.
- Keeping up with every change is near impossible.





Keeping Up with Change

Social Media & Online Narratives

Benchmarks and Leaderboards

Structured Evaluation



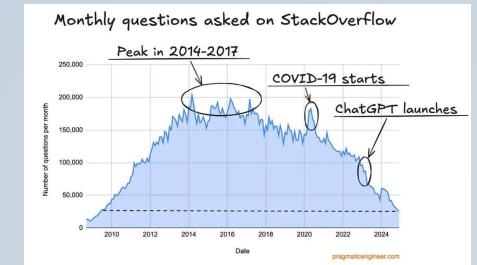
Hype Prone

Hype Proof

Online Content

Reddit

Many active communities discussing models (r/LLM, r/OpenLLama, r/ArtificialIntelligence), mix of low quality (but often entertaining) and high quality content.



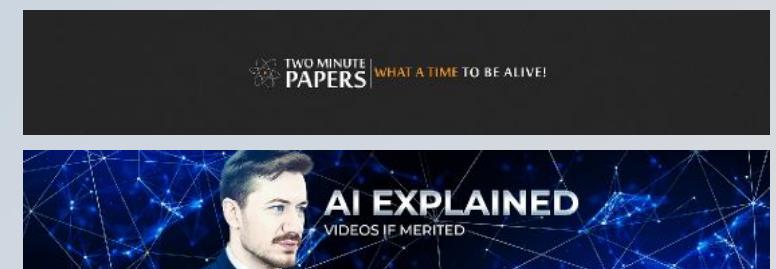
Blogs

OpenAI, GoogleAI, Anthropic blog posts for a mix of fact and hype.
Medium for additional content and examples.



Youtube Creators

As new capabilities get announced, experiment with them in toy projects guided by video tutorials.



TECH SUMMIT

Leaderboards & Research

LMArena.ai

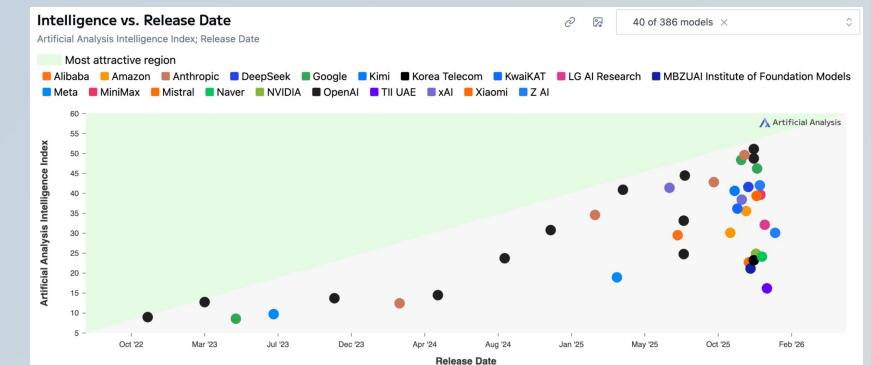
Best for - Benchmarks across many domains, comparing flagship capabilities.

Text		6 days ago	
Rank	Model	Score	Votes
1	Google gemini-3-pro	1490	27,827
2	XLGrok grok-4.1-thinking	1477	27,985
3	Google gemini-3-flash	1472	13,245
4	AI21Labs claude-opus-4-5-20251101...	1470	19,898
5	AI21Labs claude-opus-4-5-20251101	1467	21,241
6	XLGrok grok-4.1	1465	32,015

Code		7 days ago	
Rank	Model	Score	Votes
1	AI21Labs claude-opus-4-5-20251101...	1510	6,717
2	AI21Labs claude-opus-4-5-20251101	1478	6,326
3	OpenAI gpt-5.2-high	1477	1,691
4	Google gemini-3-pro	1467	13,138
5	Google gemini-3-flash	1450	6,563
6	ZAI glm-4.7	1447	4,833

ArtificialAnalysis.ai

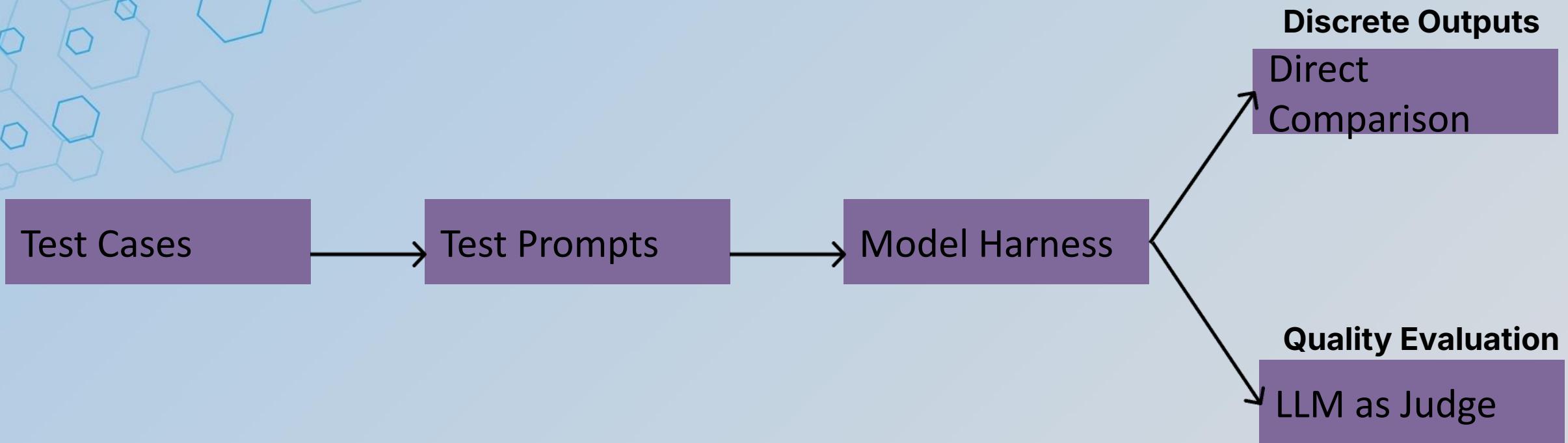
Best for - comparing cost, speed and capabilities of many models.



Papers - Hugging Face & arXiv

Best for - scientific and peer-reviewed research papers for experimental capabilities.

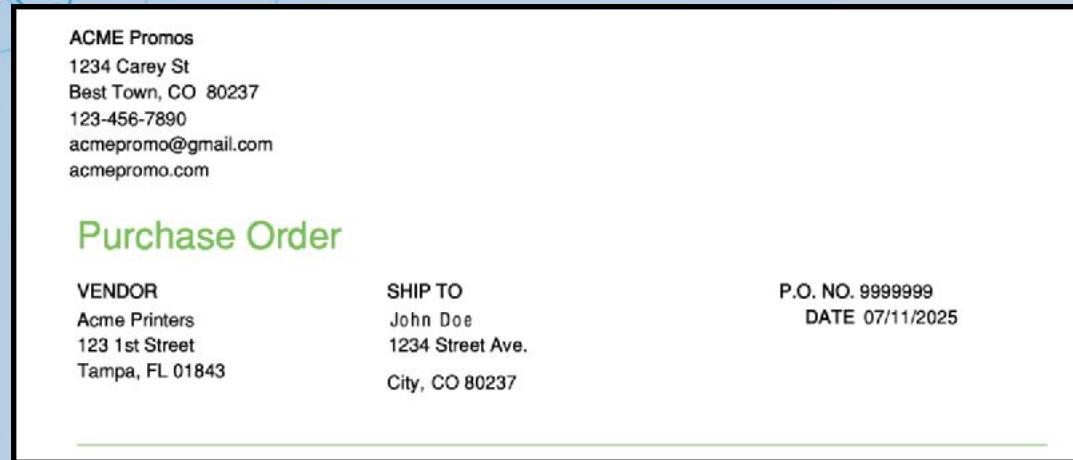
Structured Evaluation



Purpose: Be able to rapidly evaluate model capabilities against your use-cases

Structured Evaluation

Input



Function



Test Value



```
{  
  "name": "John Doe",  
  "address_line_1": "1234 Street  
Ave.",  
  "city": "City",  
  "state": "CO",  
  "postal_code": "80237"  
}
```

Example Discrete Task: Extract shipping address from purchase order pdf.

Structured Evaluation



Input

"Hi, do you have any 32oz Tumblers available that can be laser engraved and delivered to Ohio in 3 days"

Output

"Good morning, yes we have this available. Please see link here for a 32oz Tumbler we can get branded and to Ohio by Friday"

Evaluation



"Includes a greeting, information, and a link to product if available, if not available provide closest alternatives"

Example Unstructured Task: Draft a response to a customer request

Model Evaluation - Grid Approach

Test Cases

GPT5.2	✓	✓	✓	✓	✓	✓	✓
Gemini 3	✓	✓	✓	✓		✓	
Opus 4.5			✓	✓	✓	✓	
Llama 3b					✓	✓	✓
Mistral 3b			✓	✓	✓	✓	

Model Evaluation - Grid Approach

Test Cases - Iterations

	GPT5.0							
GPT5.2	✓	✓	✓	✓	✓	✓	✓	✓
Gemini 3	✓	✓	✓	✓	✓	✓	✓	
Opus 4.5			✓	✓	✓	✓	✓	
Llama 3b					✓	✓	✓	✓
Mistral 3b				✓	✓	✓	✓	

Evaluate accuracy, stability, latency, and cost across multiple models.



Model Evaluation - Pro Tips

Keep your systems model agnostic

Model selection should be config based - OpenRouter, Langchain, and other frameworks provide a simple solution.

Expand your test cases as business needs evolve

Keep tests version controlled and treat them like software, add new test cases for new features, run full suite to ensure no regressions.

Configure models at an atomic level

A single prompt chain or program should be able to use multiple models depending on requirements of each prompt or task.

Have fallbacks and redundancy

Providers go down, and deprecate models make sure you have an automated fallback mechanism.

Newer / More expensive != better

Lower 'ranking' models are often more stable in their responses, cost less and can be self-hosted.

Stay flexible - quantify & adopt improvements, avoid regression. TECH SUMMIT



Models - When to Fine Tune

Errors observed are reproducible

Model is failing in the same way consistently

Prompt complexity becomes unmanageable

You are adding in edge-case handling to prompts, chaining together exception logic, many examples added to prompts.

You have at least 500 verified 'correct' outputs

Can be human created or AI generated. This number is decreasing.

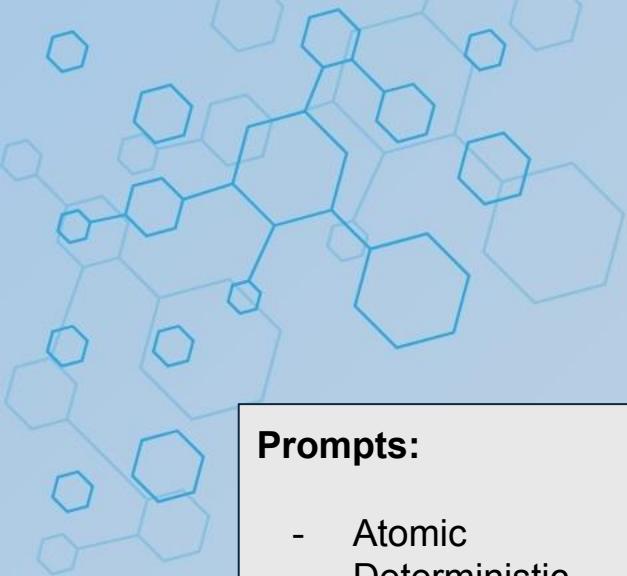
Cost or latency becomes a bottleneck to adoption

We have observed 80 - 95% cost reduction for fine tuned simple models performing at parity with flagship models.



AI System Architecture

Scaling and managing complexity from simple prompts to
agentic systems



AI System Architecture

Prompts:

- Atomic
- Deterministic
- Clear Failure Conditions

Prompt Chains & Tool Abstractions:

- Structured Orchestration
- Consensus mechanisms
- Tools & Skills

Agentic Systems:

- Long running tasks with non-deterministic output
- Autonomous research
- Abstract goals vs discrete tasks



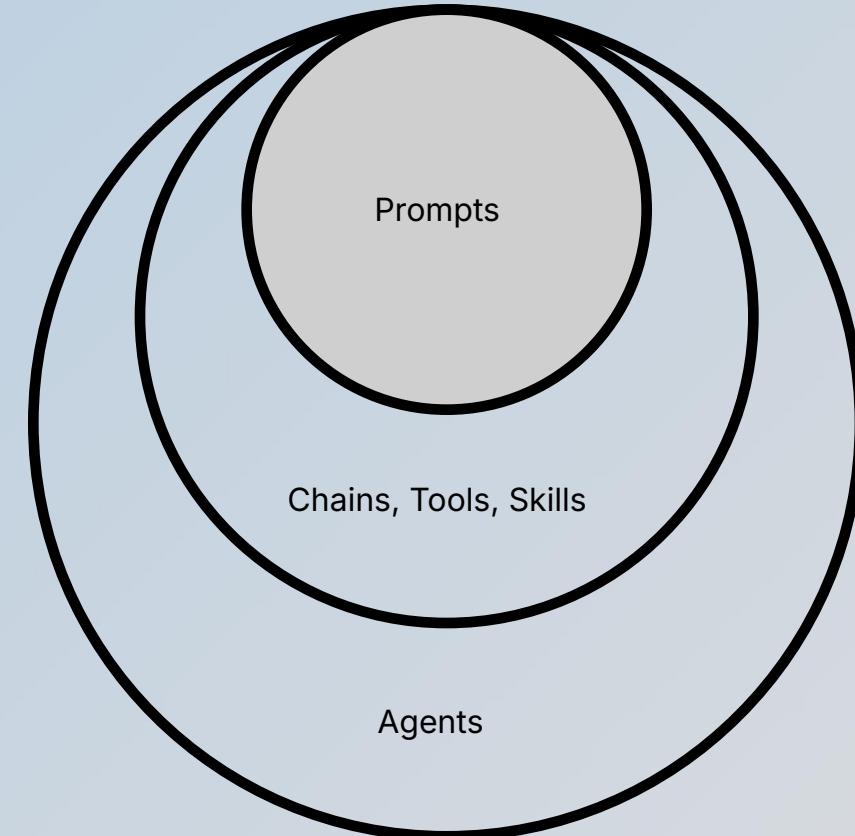
Low Complexity

High Complexity

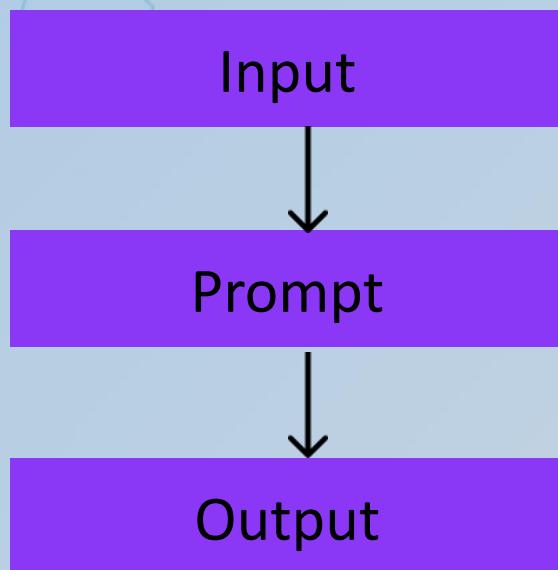


Gradually Increase Complexity

Use assets from lower complexity steps in higher-complexity architectures.



Tier 1 - Prompts



Pros

- Fast to build
- Predictable costs
- Easy for developers and business to understand

Cons

- No memory
- No decomposition
- Hard to debug (black box)

When to move forward

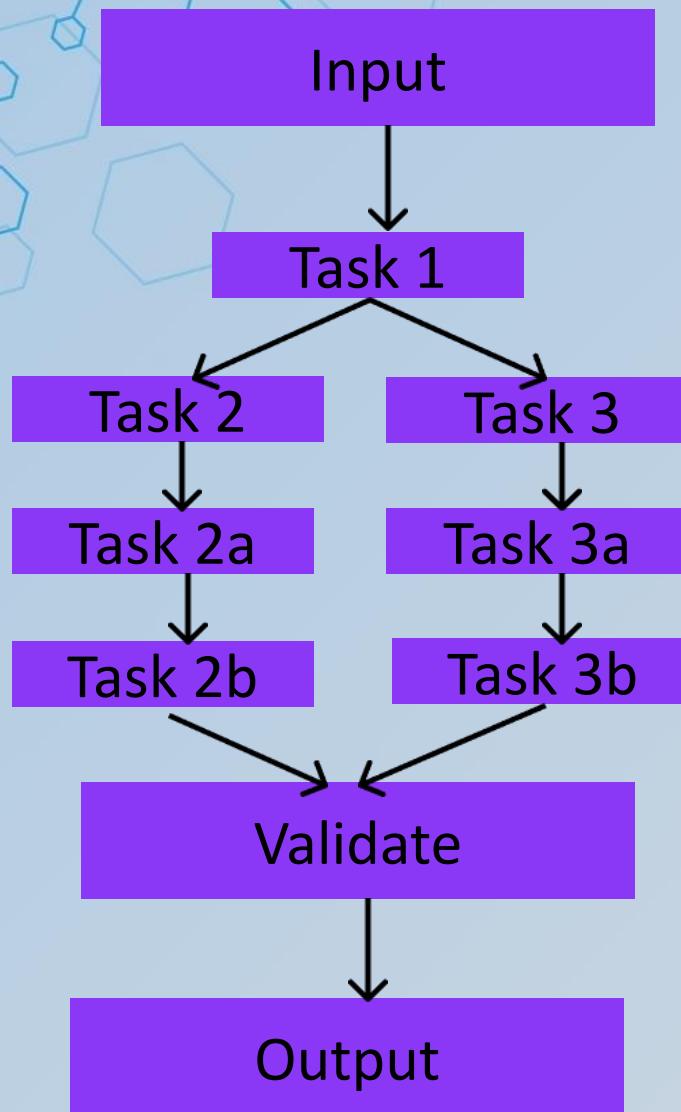
- Prompt is doing multiple jobs
- Errors are hard to diagnose
- Prompt becomes unmaintainable

Start simple, add complexity as the problem demands it.

Tier 1 - Example

Example: Rewrite supplier product descriptions to be customer friendly.

Tier 2 - Chains



Characteristics

- Tasks broken up into sub tasks
- Each step has single responsibility
- Outputs from steps as inputs to future steps
- Known pathways

Pros

- Easier to debug
- Easier to test
- Model selection and fine tuning flexibility per task.

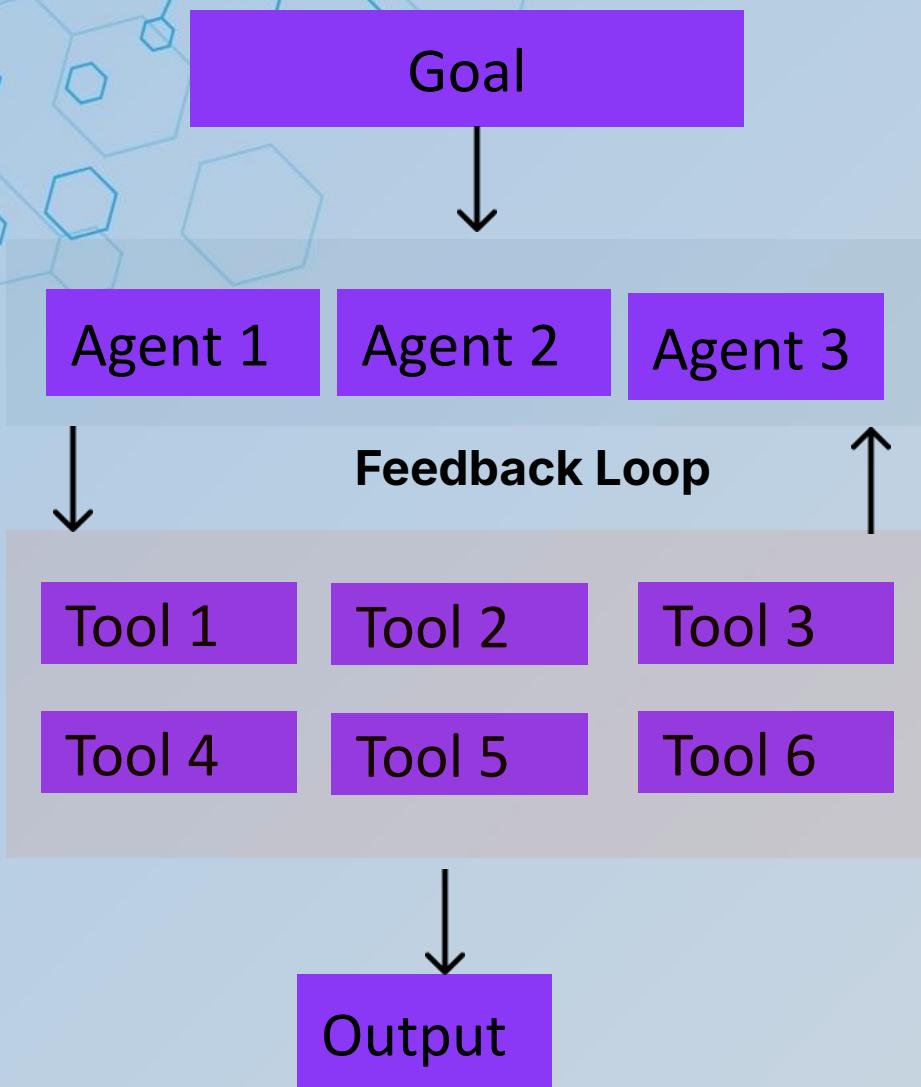
Cons

- Complex workflows can be hard to trace
- Longer time to process

Tier 2 - Example

Example: Extract data from pdf, match to
products in promostandards, generate
structured output.

Tier 3 - Agents



Characteristics

- Model chooses what to do next.
- Flow is dynamic
- System loops until it's goal is completed
- Agents have specialized context

Pros

- Handles ambiguity well
- Can recover from partial failures
- Able to handle high complexity tasks

Cons

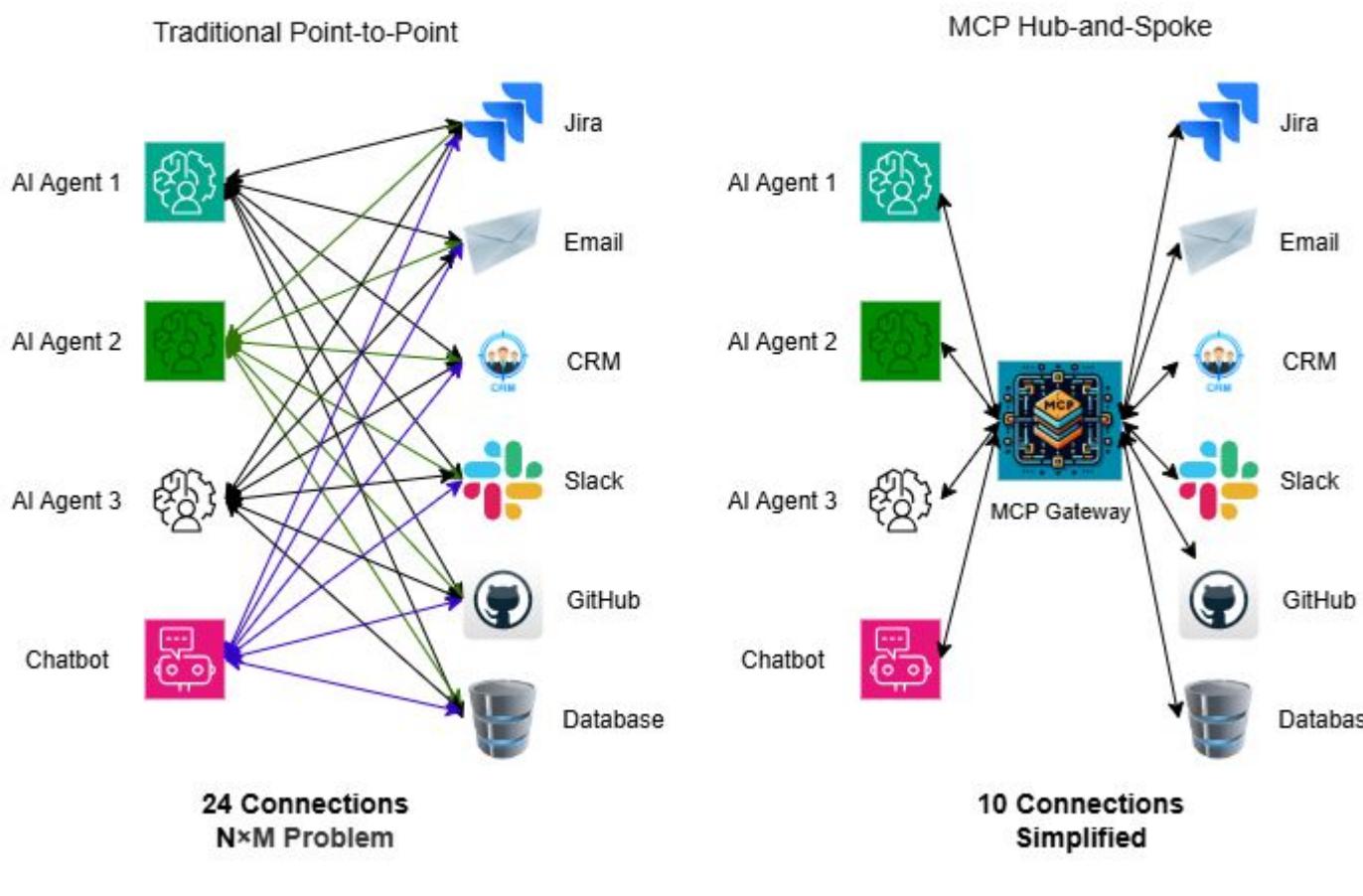
- Costs and run time are unpredictable
- Infinite loops are possible

Tier 3 - Example

Generate user-tailored marketing content

Agentic Systems - Model Context Protocol

Traditional vs MCP Integration



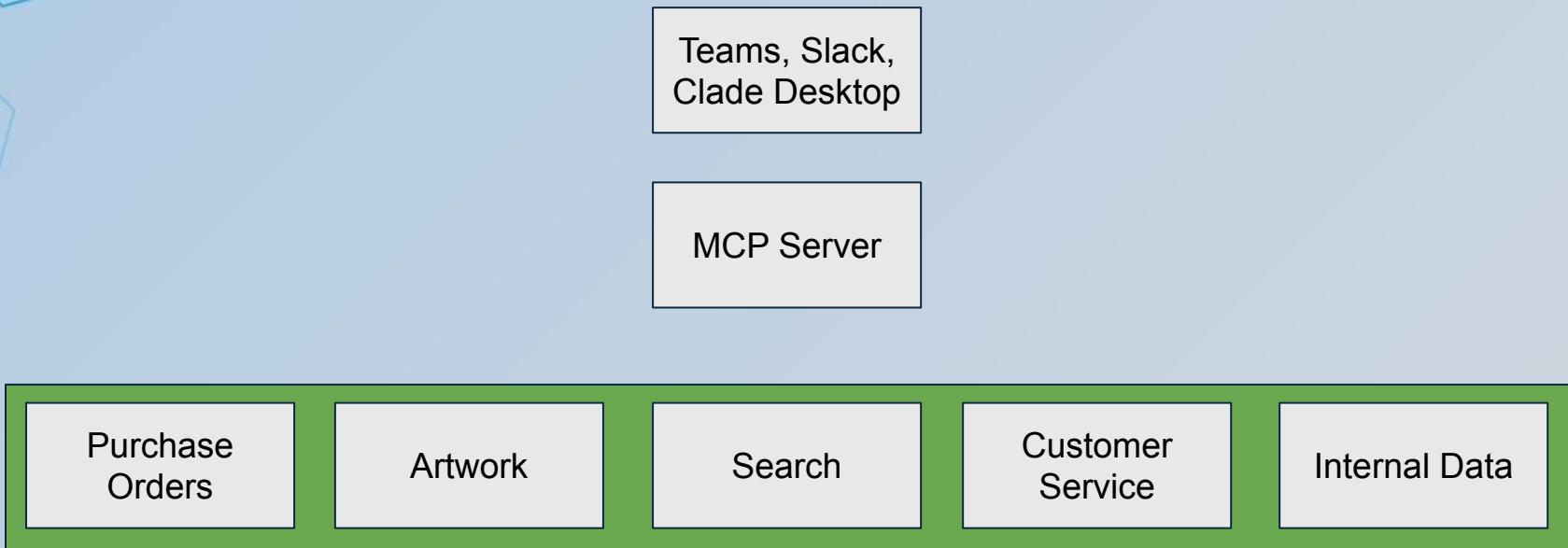
- Developed by Anthropic
- Many providers now have MCP servers (Netsuite, Hubspot, Google, thousands of others)
- MCP has drawbacks, but is a strong indicator of the future of 'AI integrated' work styles.



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Agentic Systems - Our Approach



Key Takeaways

- Evaluate models systematically against real use cases.
- Keep models configurable at a prompt level.
- As prompts become large, move complexity into architecture.
- As architecture becomes more complex or abstract consider MCP.



Q&A

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Sr. Technical Project Manager
SanMar

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AI in E-Commerce: Why Projects Fail

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Selling with 3D Models

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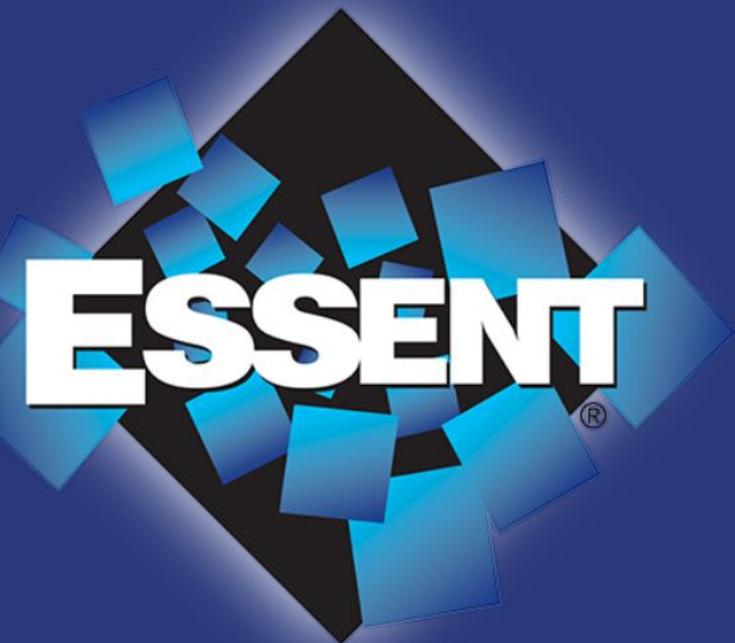


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