

The background is a dark blue field filled with a complex network of glowing blue lines, dots, and geometric shapes. These elements create a sense of depth and movement, resembling a digital or futuristic environment. The lines and dots are interconnected, forming a web-like structure that spans the entire frame. The overall aesthetic is high-tech and modern.

**DAY 1: SUNDAY FEBRUARY 1, 2026**

# WELCOME TO



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# 2026 TECH SUMMIT GOLD SPONSORS



Monday Morning/Afternoon Breaks



Tuesday Morning/Afternoon Breaks



Wednesday Morning Break



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**Showdown**  
DISPLAYS

**Hit**  
PROMOTIONAL  
PRODUCTS

**STICKER  
YOU**

 *line*  
Personalization, simplified.

  
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# Annual Members Meeting

PromoStandards Tech Summit 2026





**"Standards Up.  
Errors Down."**

**STEREO**

**45 R.P.M.  
2026  
U.S.A.**

**the  
PromoBots**



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



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# 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

# 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

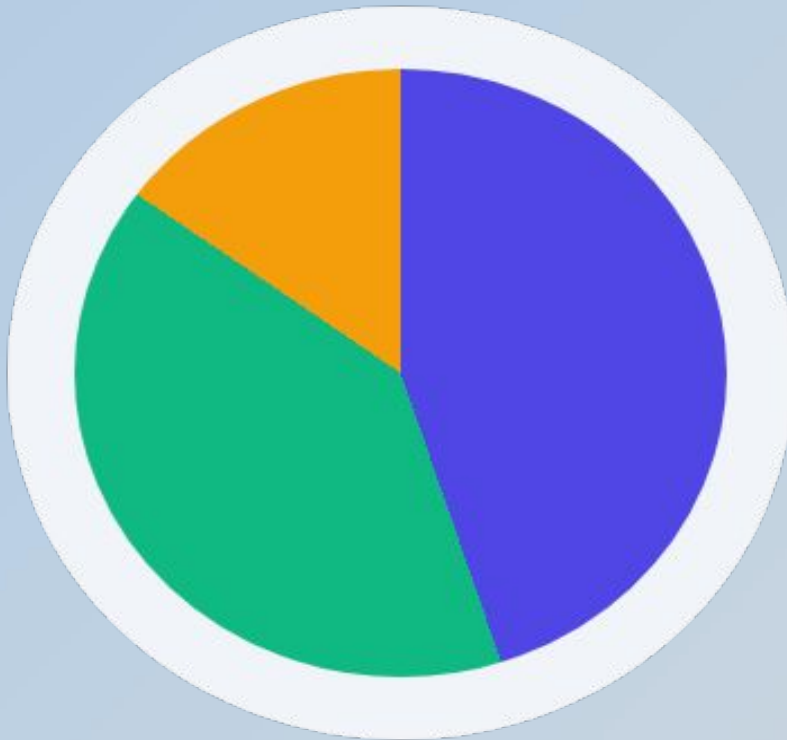


**Ajay Kaul**  
Best Practices



**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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# MONDAY BREAKFAST SPONSOR



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# PROMOSTANDARDS TECH SUMMIT



**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.



# 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.



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# OUR EVOLUTION: THE SUMMIT JOURNEY



## EARLY DAYS

Advisory  
members meeting  
together



## EXPANSION

Partnership with  
PPAI for one-day  
technical intensives



## Tech Summit

2023 1<sup>st</sup>  
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](https://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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# 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

The background is a dark blue field filled with a complex network of glowing lines and nodes. The lines are primarily blue and white, with some red and yellow accents. They form a grid-like pattern with various geometric shapes, including circles, hexagons, and rectangles. The nodes are small dots of light in various colors (blue, yellow, red, green) that connect the lines. The overall effect is a sense of a digital or technological landscape, possibly representing a network or data flow.



# 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:

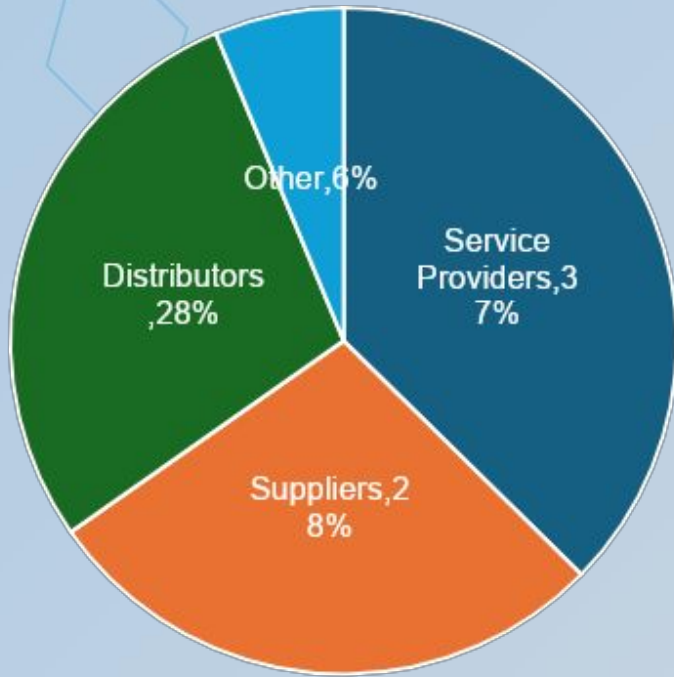
- PIMs
- Artwork Automation
- Production Routing
- Shipping intelligence
- Compliance & security layers



# 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**



# MONDAY BREAK SPONSOR



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Showdown<sup>®</sup>  
DISPLAYS

# 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, Cimpres



**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

The screenshot shows a web browser displaying the Confluence 'Best Practices Public' space. The browser's address bar shows the URL: `promostandards.atlassian.net/wiki/spaces/BPP/overview?homepagelid=1343029374`. The Confluence navigation bar at the top includes links for Home, Recent, Spaces, Teams, Apps, and Templates, along with a 'Create' button and a search bar. The left sidebar for the 'Best Practices Public' space contains a tree view with categories like 'All content', 'Blogs', 'Automation', 'Space settings', 'SHORTCUTS', and 'CONTENT'. The 'CONTENT' section is expanded, showing a list of items including 'Best Practices', 'Distributor Home', 'Supplier Home', 'Supplier Templates', 'Supplier Technical Integration Strategies', 'Endpoint with Best Practice Fields Identified', 'Product Data 2.0', 'Product Pricing and Config 1.0', 'Inventory 2.0', 'Media 1.1', 'Order Shipment Notification 1.0', and 'Order Status 1.0'. The main content area of the page is titled 'Best Practices Public Home' and includes a welcome message, a paragraph about the page's goal, three colored callout boxes with links, a 'How to Use this Site' section with a bulleted list, and a concluding paragraph.

promostandards.atlassian.net/wiki/spaces/BPP/overview?homepagelid=1343029374

Suggested Sites Web Slice Gallery weather Imported From IE Locations | King Co... SanMar Web Services Inksoft Supplier login NOVAtime Supervis... Hybris Support Call Center - Style S... Outlook Web App Features Imported

Confluence Home Recent Spaces Teams Apps Templates Create

Search

Best Practices Public

Best Practices Public Home

Welcome to PromoStandards Best Practices Page

The goal of this page is to bring together the years of experiences from both Suppliers hosting PromoStandards API's and Distributors consuming PromoStandards API's to help create a more seamless and cohesive experience for both.

If you are a Distributor or a consumer of PromoStandards API's, check out the Best Practices Distributor Home

General Best Practices for both Distributors and Suppliers

If you are a Supplier or a provider of PromoStandards API endpoints, check out the Best Practices Supplier Home

How to Use this Site

Best Practices information is published from the PromoStandards Best Practices committee as a resource to help Distributors and Suppliers adopt and utilize PromoStandards. Navigate through the content by:

- Following the links in the page
- Searching from Search in the upper right corner
- Navigating the page tree on the left side

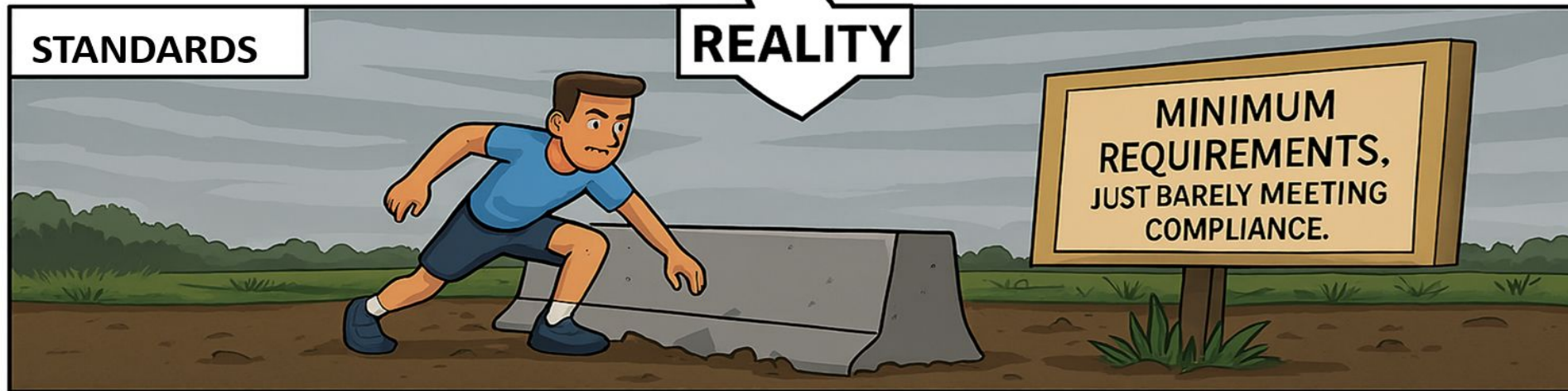
All content is structured to direct Distributors to Distributor-centric documentation, Suppliers to Supplier-centric documentation, and a General section for what is shared by both. The Best Practices Committee has attempted to apply real-world lessons-learned from its own members' implementations of PromoStandards - we hope this assists other Distributors and Suppliers in their own rollouts.



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



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



# API Overuse – Order Status/OSN

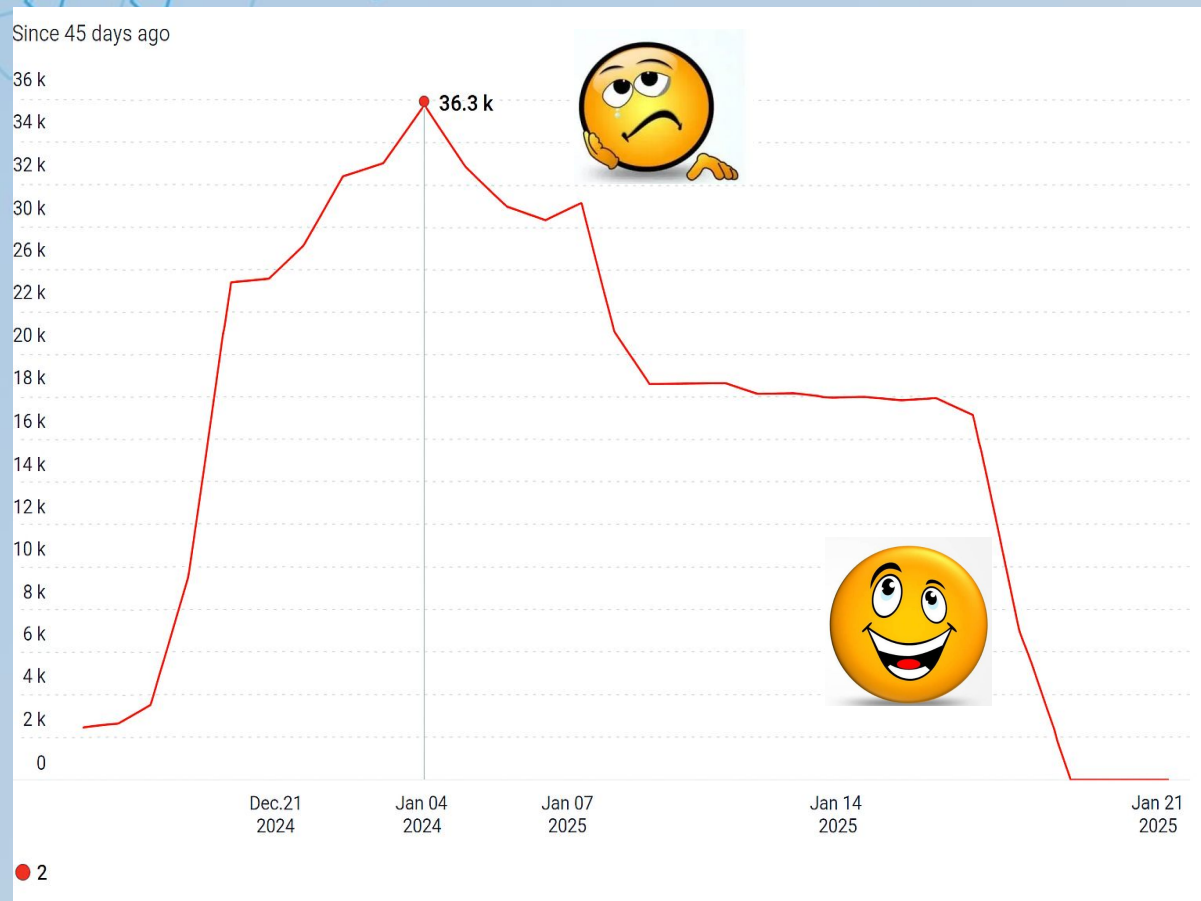


<https://promostandards.atlassian.net/wiki/spaces/BPP/pages/1408467010/Supplier+Templates+and+Best+Practices>

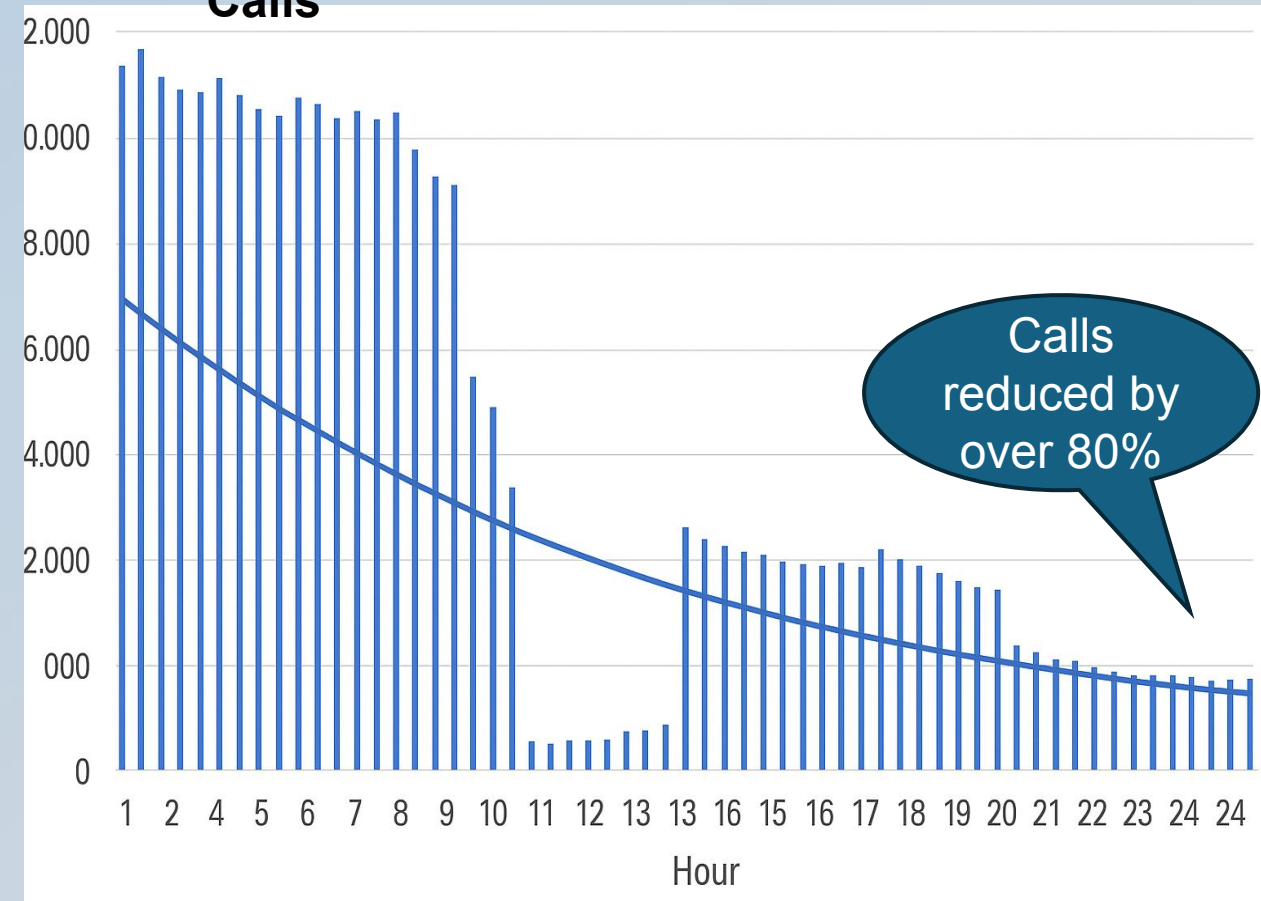


# API Overuse – Inventory/PPC

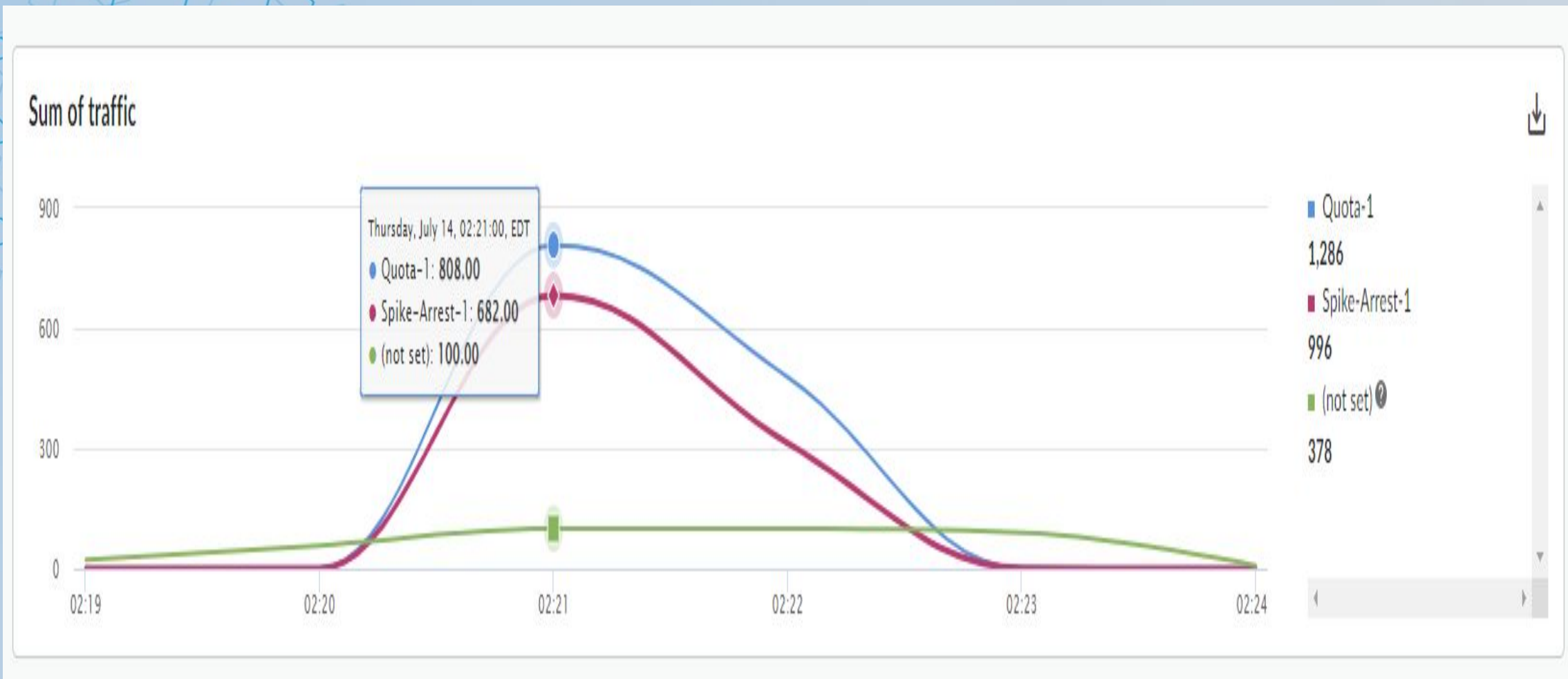
## Failed Inventory Calls



## 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.

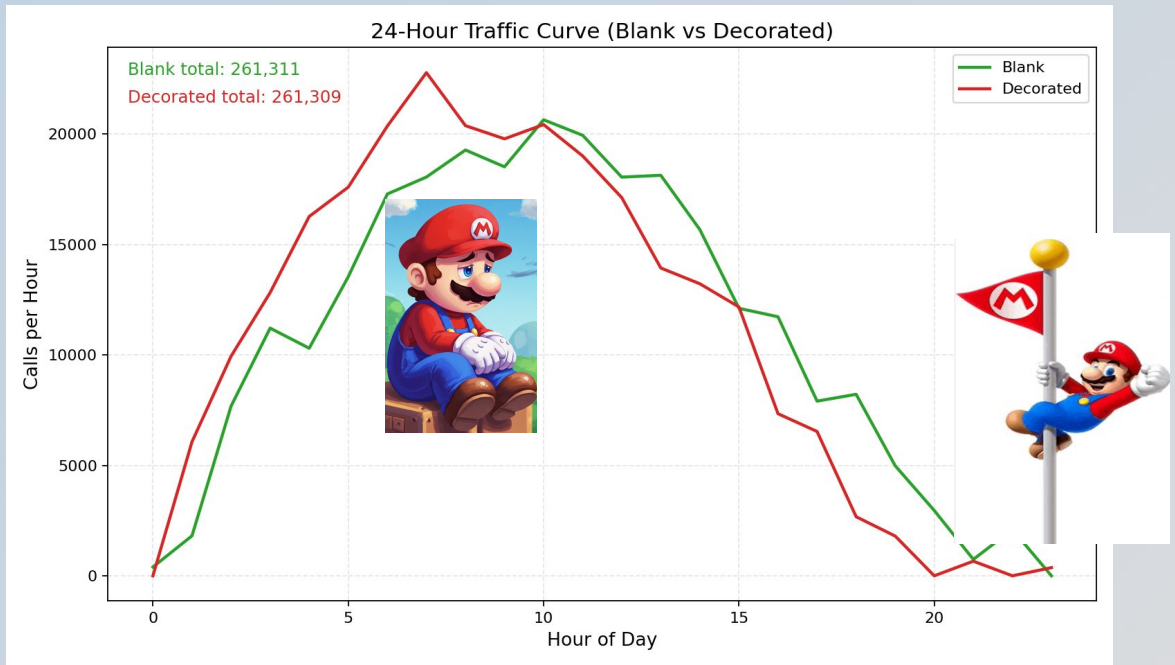
# Invalid Address

```
<shar:ShipTo>
  <shar:ContactDetails>
    <shar:companyName>ABC Emboridery</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>
```



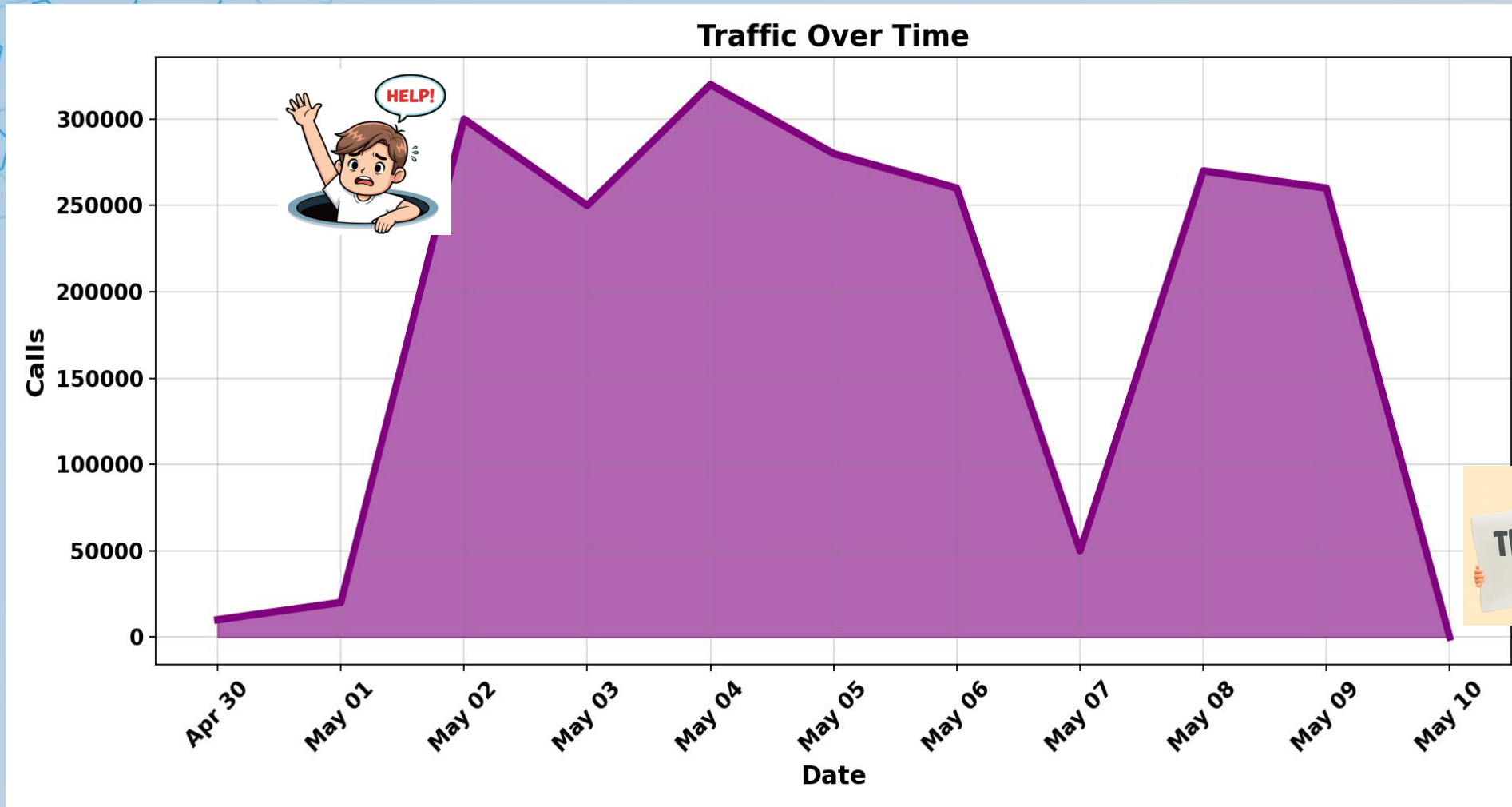
## Pulling Decorated vs Blank pricing data through PPC 1.0

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



# Pulling pricing/other data by FOB through PPC 1.0

<shar:fobld>6</shar:fobld>

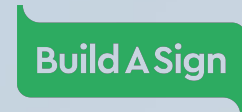




# Best Practices, the good, the bad, & the ugly



**David Goldman**  
Director of Technology  
Cimpres



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

**ADOPTING THE "BUILD A BRIDGE" STANDARD**

**SKIPPING THE "CONNECT TO THE OTHER SIDE" BEST PRACTICE**

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
	Blue
	Green
	Green
	Red
	Blue

**Expectation**  
(Standardized Data)



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

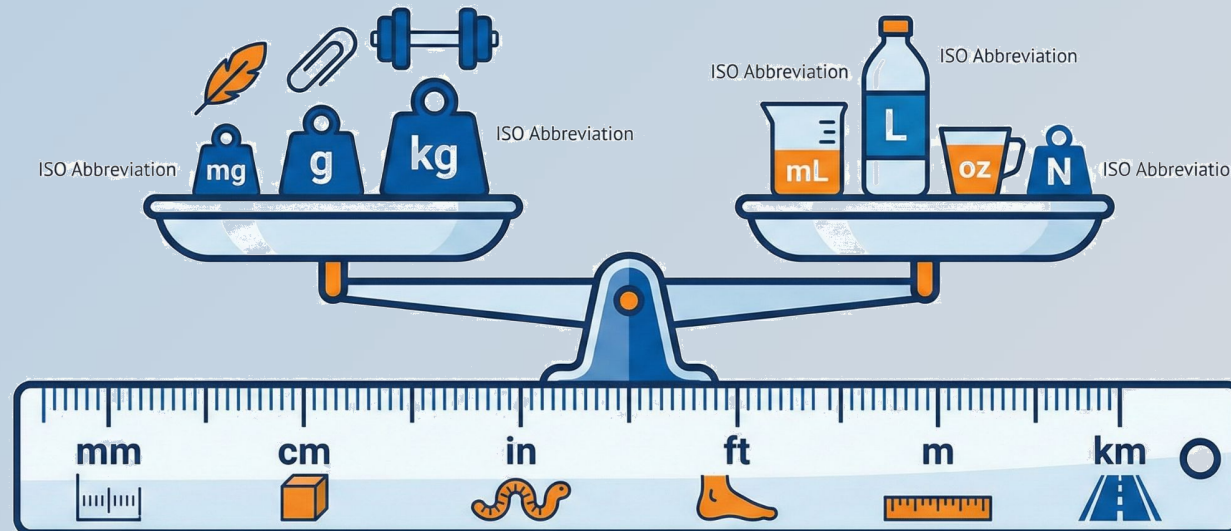
**Reality**  
(Free Text Fields)

# 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?

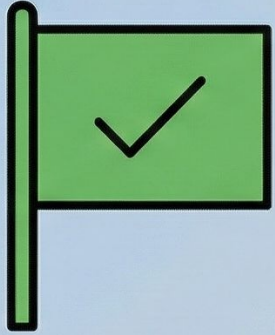
“IN” or “inches” or “inch” or “IN (inch)”





# Best Practices, Product Status

isSellable=TRUE



isCloseout=FALSE

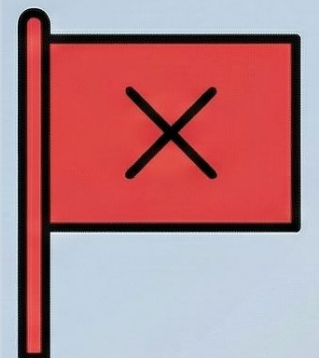
What does it mean when:

`getProductSellable()`

`getProductCloseOut()`

all return the exact same set of products?

isCloseout=FALSE



*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 <b>won't</b> 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](https://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

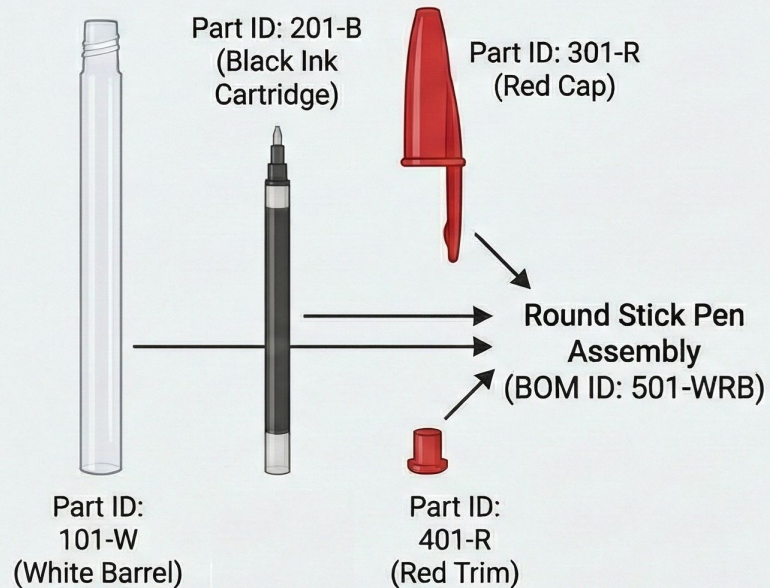




# Other Potential Future Best Practices

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.

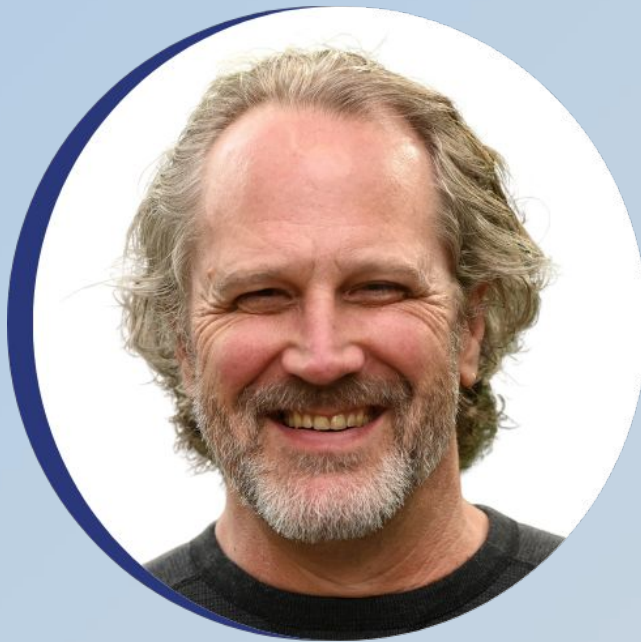


# Why best practices? Distributors will love you!

Fewer e-mails, meetings or phone calls  
More of your catalog on more distributor sites



# Self Assessment Questionnaire



**Steve Kasperson**  
Staff Engineer  
S&S Activewear



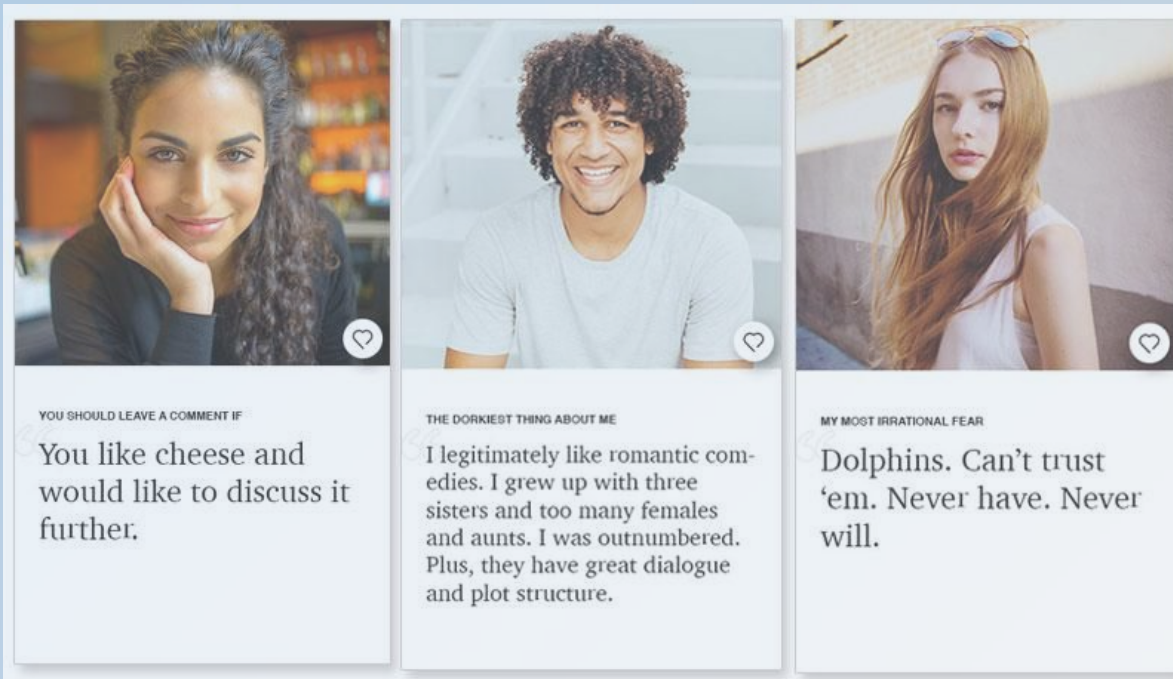
# Self Assessment Questionnaire

- 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.



# 2025 PromoStandards Best Practices New Specs and XML Examples



**Patrick Elliot**  
Director of IT  
SnugZ USA



5 new Specs in 2025



New XML  
Examples for 12  
endpoints.



# Why XML Examples

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

# 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

```
<?xml version='1.0' encoding='UTF-8'>
<SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/" xmlns:ns1="http://www.promostandards.org/WSOL/ProductDataService/2.0.0/SharedObjects/" xmlns:ns2="http://www.promostandards.org/WSOL/ProductDataService/2.0.0/SharedObjects/">
  <SOAP-ENV:Header>
    <SOAP-ENV:Body>
      <ns2:GetProductResponse>
        <ns2:Product>
          <ns1:productId>5880</ns1:productId>
          <ns1:productName>Gildan® Adult Heavy Cotton™ T-Shirt</ns1:productName>
          <ns1:description>5.3 Oz. Preshrunk 100% Cotton Jersey (Blended Cotton/Polyester In Antique, Heather, Neon And Safety Colors). Seamless Double-Needle 7/8" Collar. Taped Neck And Shoulders. Double-
          <ns2:ProductMarketingPointArray>
            <ns1:ProductMarketingPoint>
              <ns1:pointType>Highlight</ns1:pointType>
              <ns1:pointCopy>5.3 Oz. </ns1:pointCopy>
            </ns1:ProductMarketingPoint>
          </ns2:ProductMarketingPointArray>
          <ns1:productBrand>Gildan</ns1:productBrand>
          <ns2:export>true</ns2:export>
          <ns2:ProductCategoryArray>
            <ns1:ProductCategory>
              <ns1:category>Apparel</ns1:category>
              <ns1:subCategory>Short Sleeve</ns1:subCategory>
            </ns1:ProductCategory>
            <ns1:ProductCategory>
              <ns1:category>Apparel</ns1:category>
              <ns1:subCategory>Apparel - Men's</ns1:subCategory>
            </ns1:ProductCategory>
          </ns2:ProductCategoryArray>
          <ns2:ProductPriceGroupArray>
            <ns1:ProductPriceGroup>
              <ns1:ProductPriceArray>
                <ns1:ProductPrice>
                  <ns1:quantityMin>72</ns1:quantityMin>
                  <ns1:price>9.35</ns1:price>
                  <ns1:discountCode>C</ns1:discountCode>
                </ns1:ProductPrice>
                <ns1:ProductPrice>
                  <ns1:quantityMin>144</ns1:quantityMin>
                  <ns1:price>6.26</ns1:price>
                  <ns1:discountCode>C</ns1:discountCode>
                </ns1:ProductPrice>
                <ns1:ProductPrice>
                  <ns1:quantityMin>288</ns1:quantityMin>
                  <ns1:price>5.31</ns1:price>
                  <ns1:discountCode>C</ns1:discountCode>
                </ns1:ProductPrice>
                <ns1:ProductPrice>
                  <ns1:quantityMin>584</ns1:quantityMin>
                  <ns1:price>4.49</ns1:price>
                  <ns1:discountCode>C</ns1:discountCode>
                </ns1:ProductPrice>
              </ns1:ProductPriceArray>
              <ns1:groupName>Embroidery</ns1:groupName>
              <ns1:currency>USD</ns1:currency>
            </ns1:ProductPriceGroup>
            <ns1:ProductPriceGroup>
              <ns1:ProductPriceArray>
                <ns1:ProductPrice>
                  <ns1:quantityMin>72</ns1:quantityMin>
                  <ns1:price>12.91</ns1:price>
                  <ns1:discountCode>C</ns1:discountCode>
                </ns1:ProductPrice>
                <ns1:ProductPrice>
                  <ns1:quantityMin>144</ns1:quantityMin>
                  <ns1:price>11.23</ns1:price>
                  <ns1:discountCode>C</ns1:discountCode>
                </ns1:ProductPrice>
                <ns1:ProductPrice>
                  <ns1:quantityMin>288</ns1:quantityMin>
                  <ns1:price>9.76</ns1:price>
                  <ns1:discountCode>C</ns1:discountCode>
                </ns1:ProductPrice>
              </ns1:ProductPriceArray>
            </ns1:ProductPriceGroup>
          </ns2:ProductPriceGroupArray>
        </ns2:Product>
      </ns2:GetProductResponse>
    </SOAP-ENV:Body>
  </SOAP-ENV:Header>
</SOAP-ENV:Envelope>
```



# 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 <a href="#">product status</a> .
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



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# 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	



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# PromoStar

The open industry-standard way to  
partners across the promotion

[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:**  
**Standards Committee -**  
**New Standards**  
Dunes Ballroom (here!)



**Erica Griffitt**  
Senior Software Engineer  
Staples Promo

# STANDARDS COMMITTEE

The background is a dark blue field filled with a complex network of glowing blue lines and dots. These lines form various geometric patterns, including hexagons and squares, and intersect to create a sense of depth and connectivity. Small, multi-colored dots (yellow, green, red, purple) are scattered throughout, adding to the digital aesthetic. The overall effect is that of a high-tech, futuristic digital environment.



# Members

Robert Cathro-Oliver  
commonsku

David Gallant  
Gemline

Erica Griffitt  
Staples

Allen Casey  
HALO

Brian Carothers  
Proforma

Dustin Filip  
S & S  
Activewear

Yufeng Guan  
Starline

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

## 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

# From SOAP to REST – Really!

## Defining our general approach

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



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# 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:

Submit



# 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.



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## 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

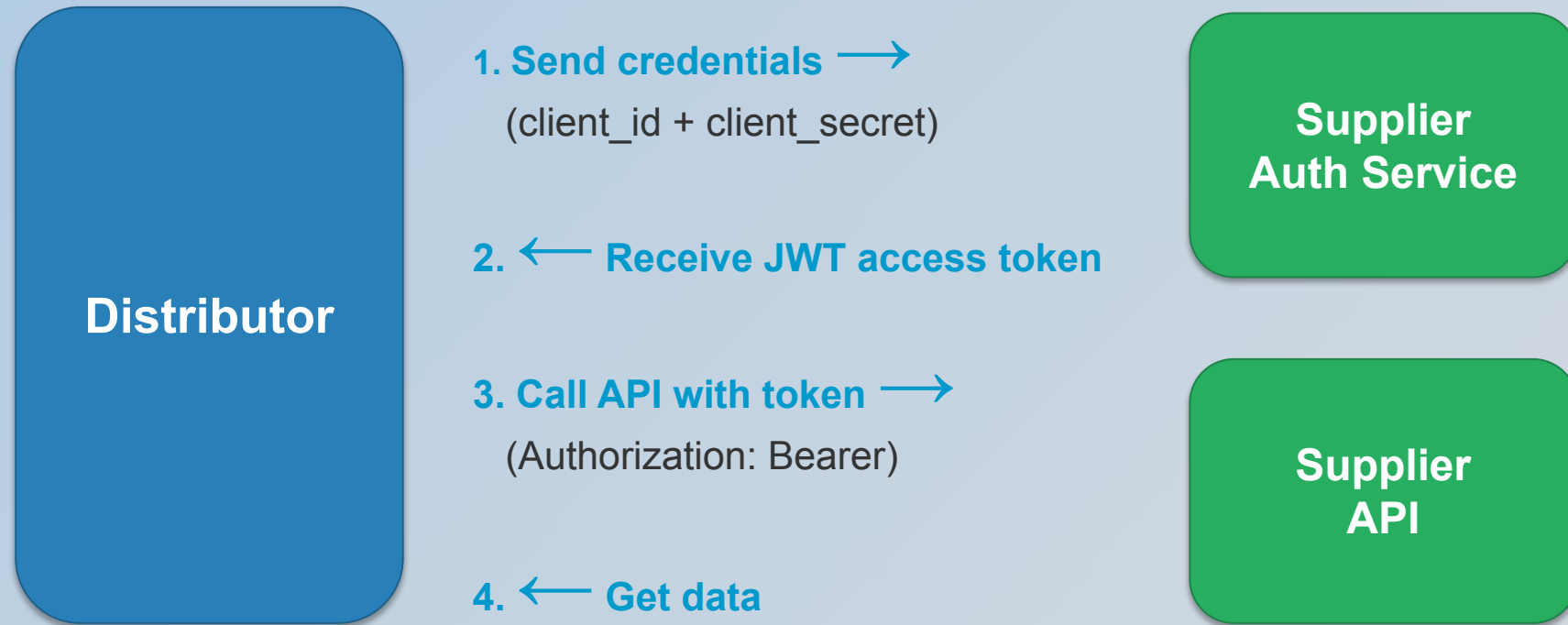
- Uses a **temporary digital token** instead of sending usernames and passwords repeatedly.
- OAuth 2.0 Client Credentials flow with JSON Web Tokens (JWT) - the proven standard for M2M APIs
- Token is **time-limited** and automatically expires.
- Passwords no longer included in request body.
- Makes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



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# How It Works - OAuth 2.0 Client Credentials Flow





# 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](https://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)

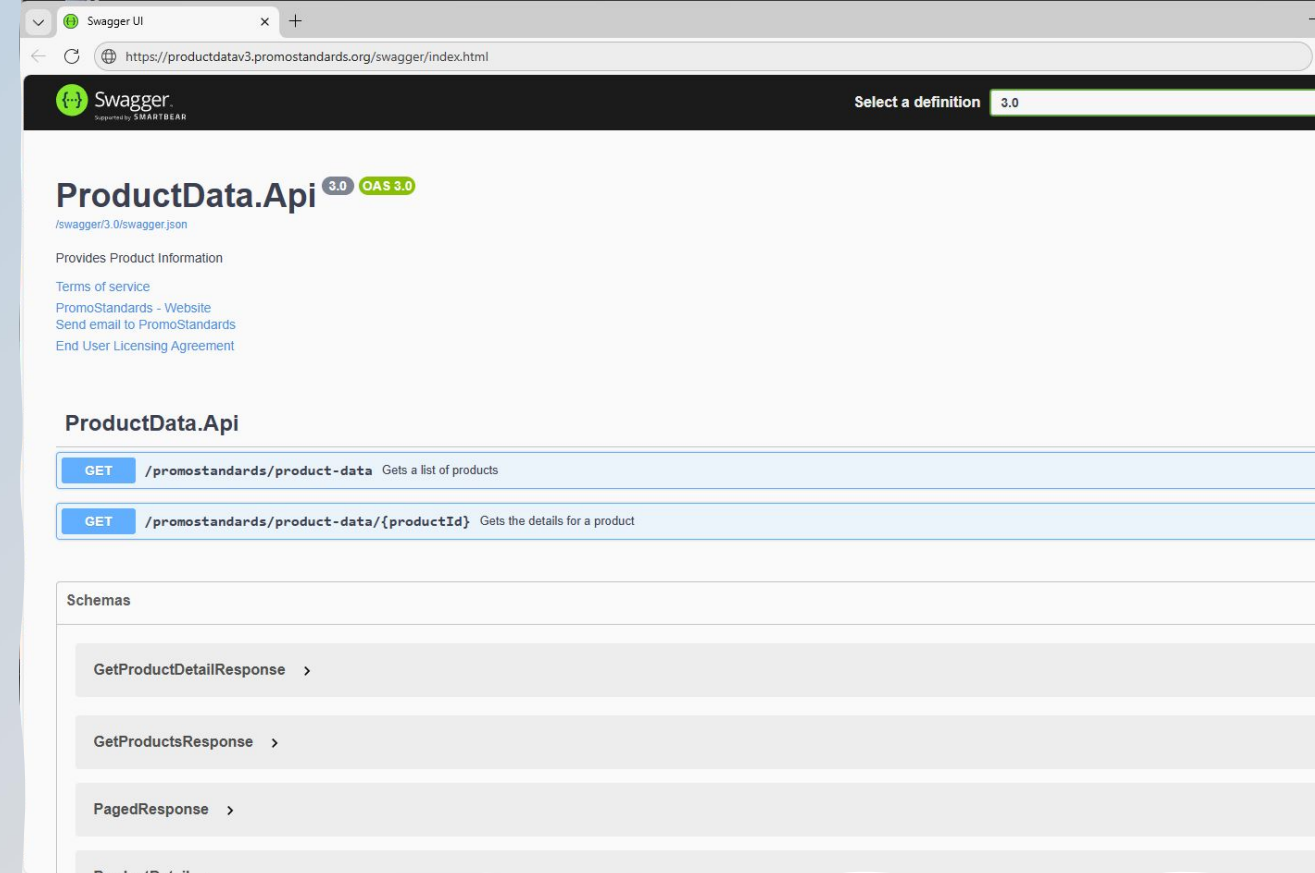
## Timeline

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



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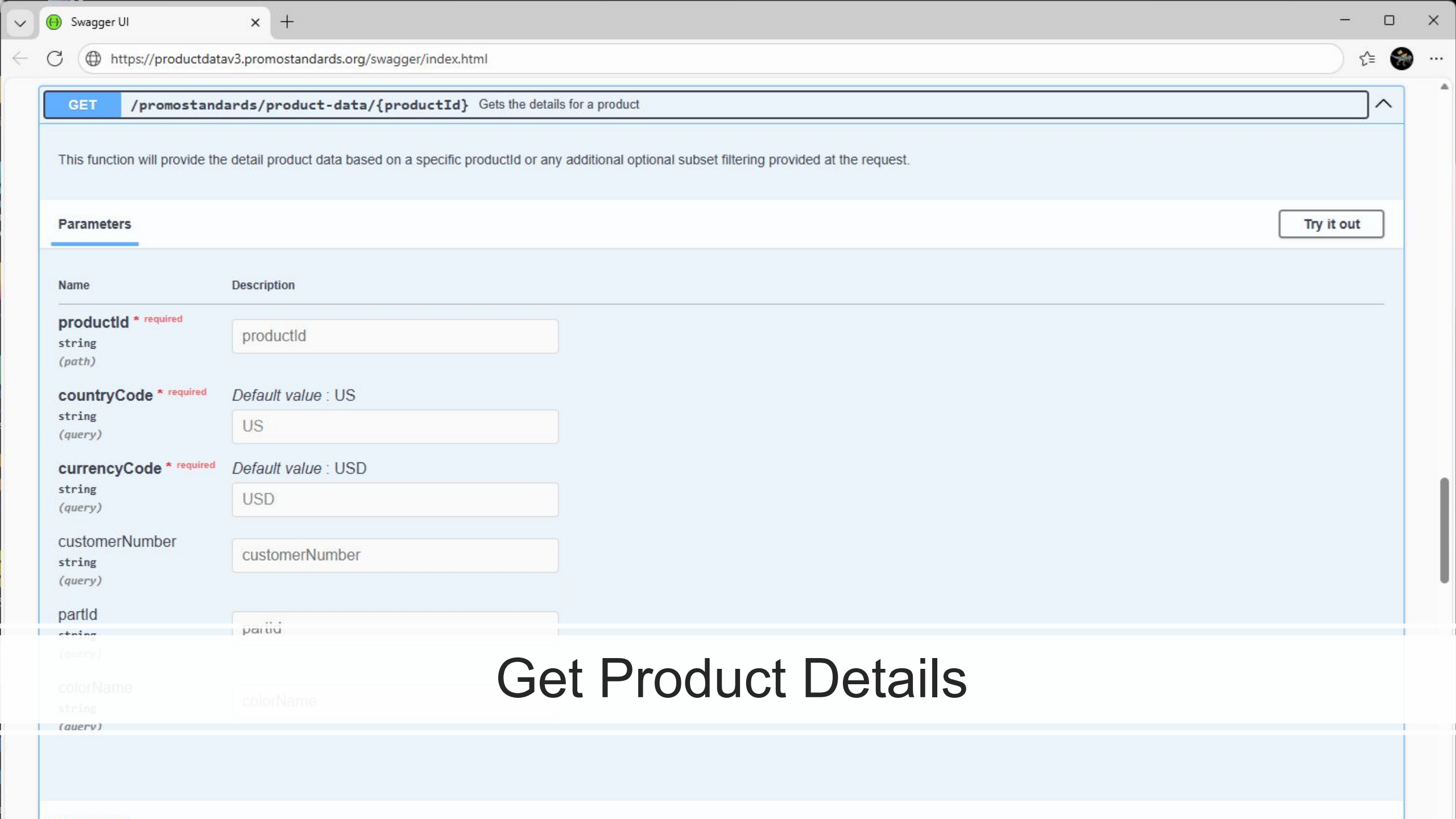


# Product Data 3.0

# Get Products

## Sample Response

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



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
<b>productId</b> * required string (path)	<input type="text" value="productId"/>
<b>countryCode</b> * required string (query)	Default value : US <input type="text" value="US"/>
<b>currencyCode</b> * required string (query)	Default value : USD <input type="text" value="USD"/>
customerNumber string (query)	<input type="text" value="customerNumber"/>
partId string (query)	<input type="text" value="partId"/>
colorName string (query)	<input type="text" value="colorName"/>

# Get Product Details



# Product Data 3.0

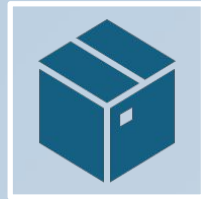
```
{
  "product": {
    "productId": "2000",
    "name": "Shirt 1000",
    "description": "This is the description",
    "businessLine": "The Best Line",
    "brand": "PromoStandards",
    "manufacturer": "Gildan",
    "manufacturerProductId": "2000",
    "primaryImageUrl":
    "https://www.promostandards.com/2000.jpg",
    "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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# ECOMM, POD, & PROMOSTANDARDS



**Jayson Tompkins**  
Founder  
Stahls Fulfill Engine

## PANELISTS:



**Grace Schettler**  
Senior VP of Sales  
Chipply



**Mykayla Goodwin**  
VP of Strategy & Marketing  
OMG



**Rob Watson**  
CEO  
Vantage Apparel

# Ecom, POD & PromoStandards

Jayson Tompkins  
Stahls' Fulfill Engine  
Founder, CDO



Rob Watson  
Vantage Apparel  
CEO



Mykayla Goodwin  
Order My Gear  
VP of Strategy



Grace Schettler  
Chipply  
SVP of Sales



# PromoStandards Origin



# PromoStandards Today

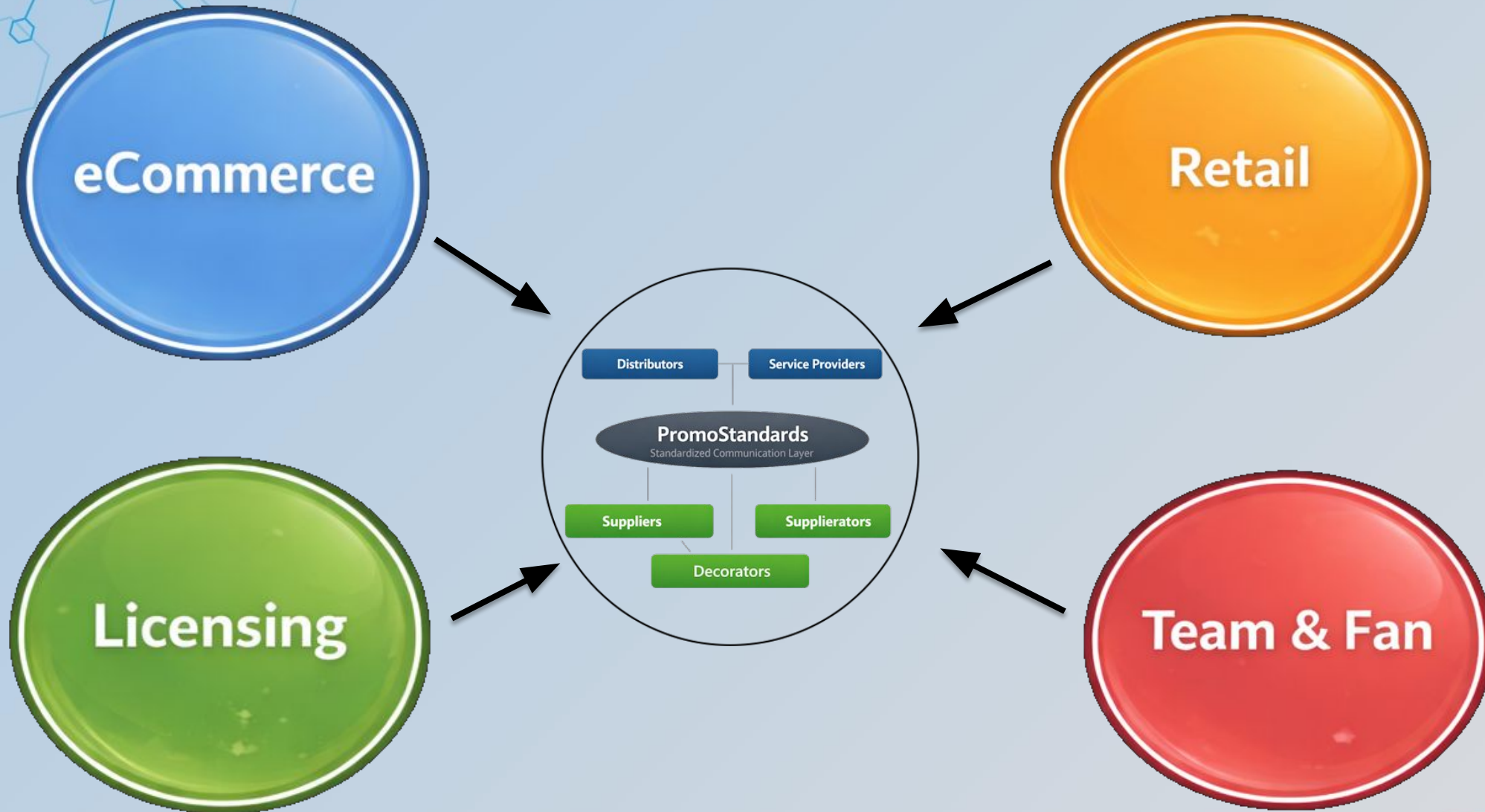




# “\$27B Promo Industry”



# The Real \$113B Industry





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



# QUESTIONS



# MONDAY BREAK SPONSOR



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Showdown<sup>®</sup>  
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  
Outrage

# 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)



## PROJECT: OPERATION SOLAR FLARE

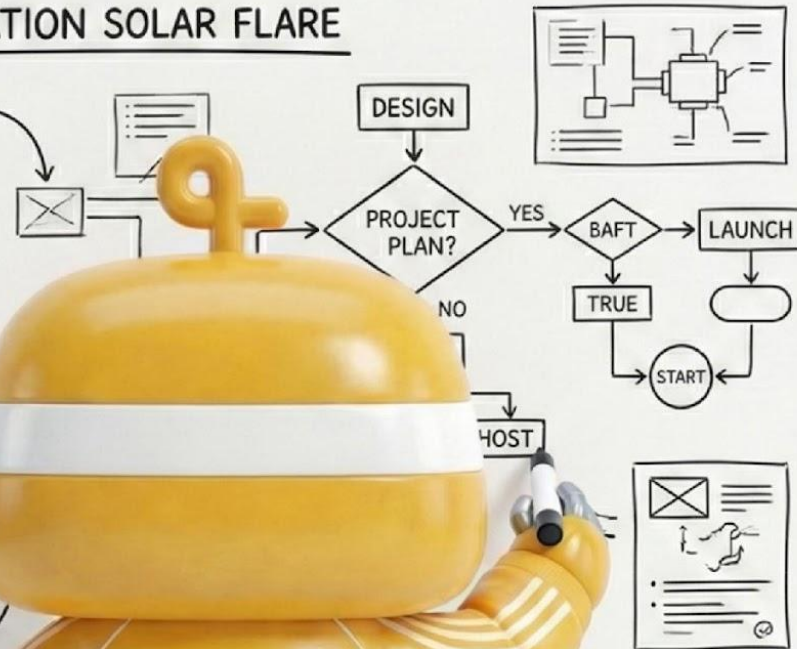
### • PHASE 1: DESIGN

- APPLY: DESIGN
- DESIGN DESIGNS
- TAHOR TURUTURE

### • PHASE 2: BUILD

- PROJECT PLANNING
- LARK OF CREATION
- SKKT TO BUILD

### • PHASE 3: LAUNCH



## 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`)

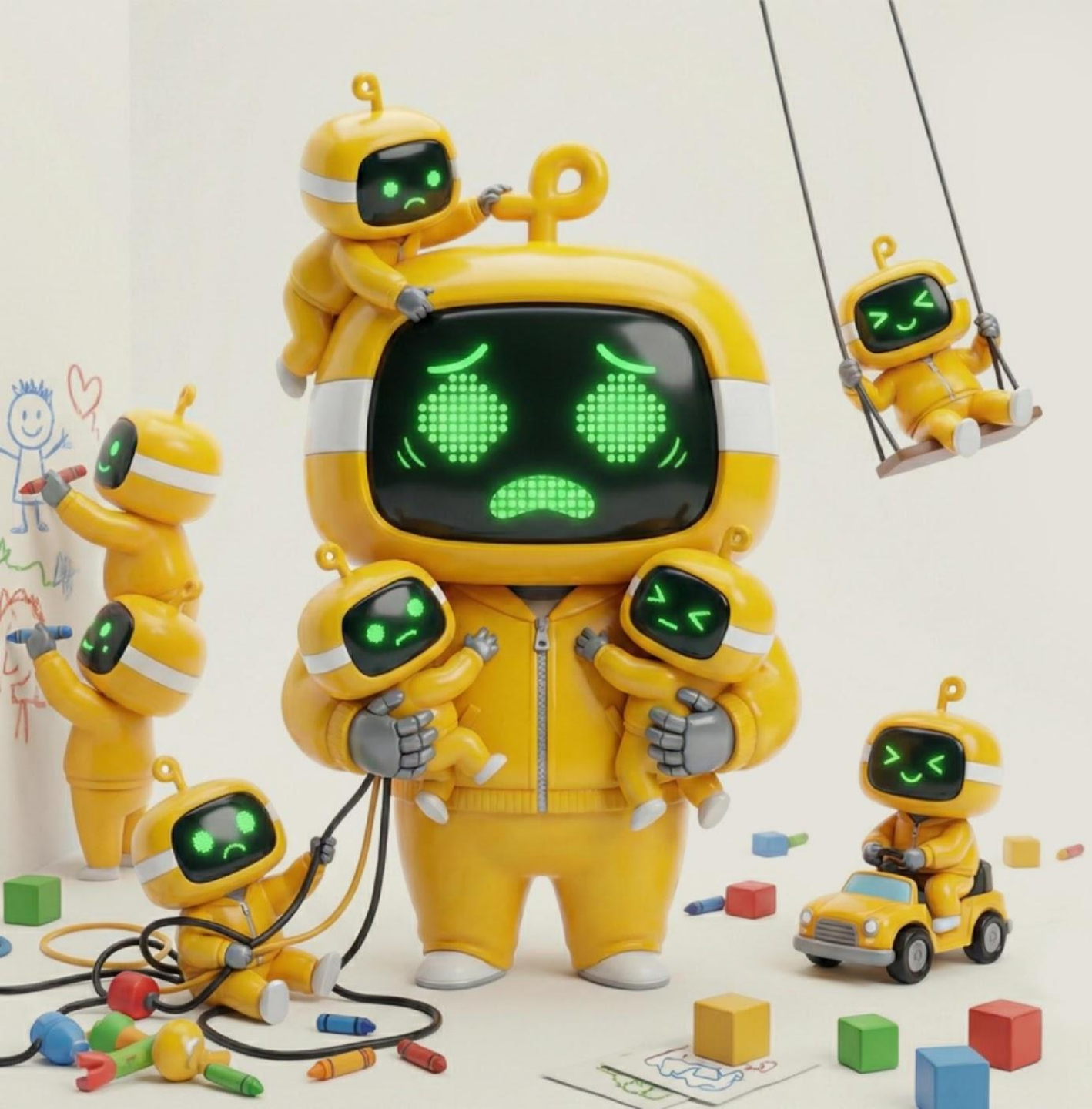




## Pro Tips: Subagents

- ⌘ 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)

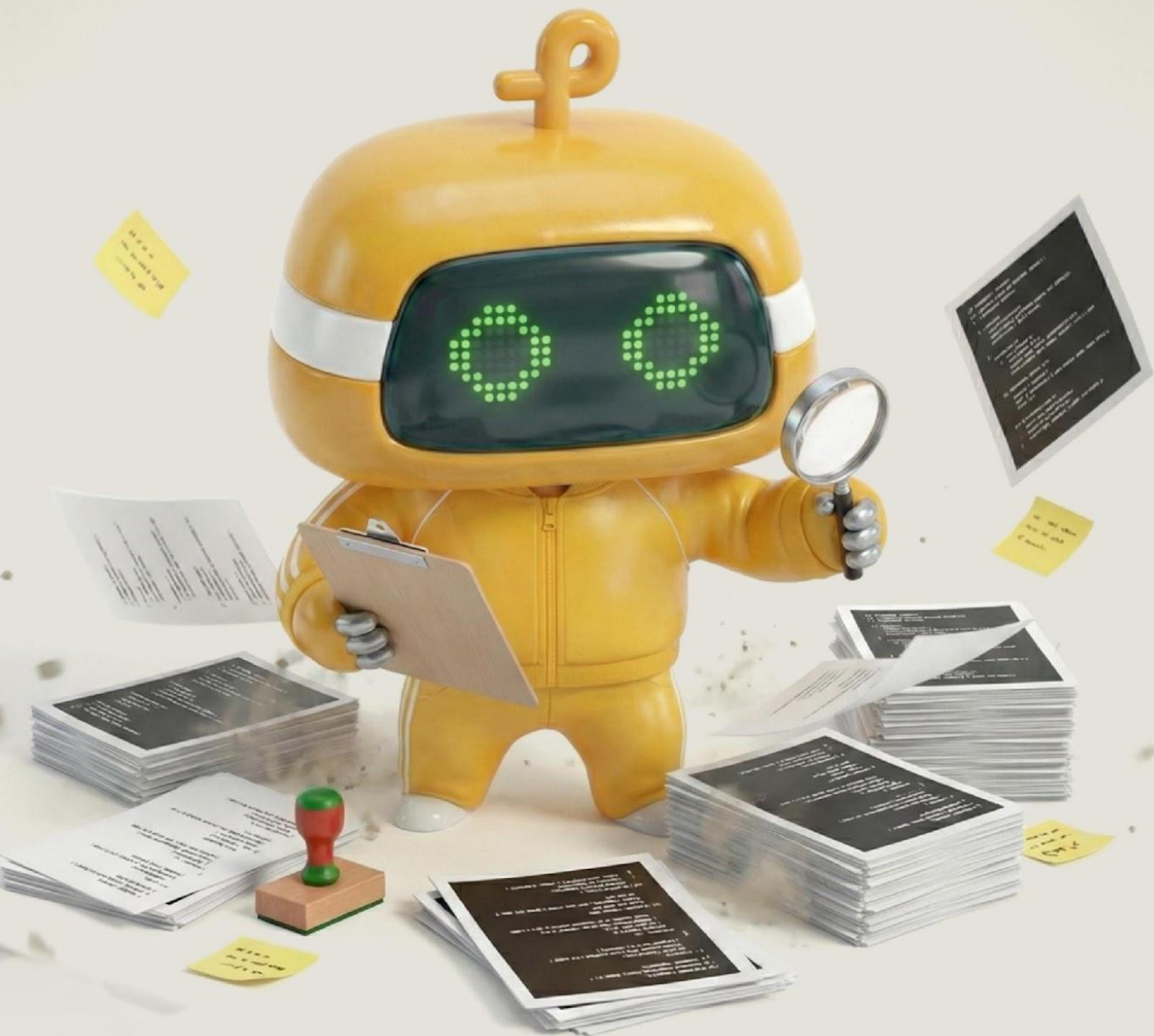
### TestCraft

- ⌘ 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](https://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
- Scraped 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.”





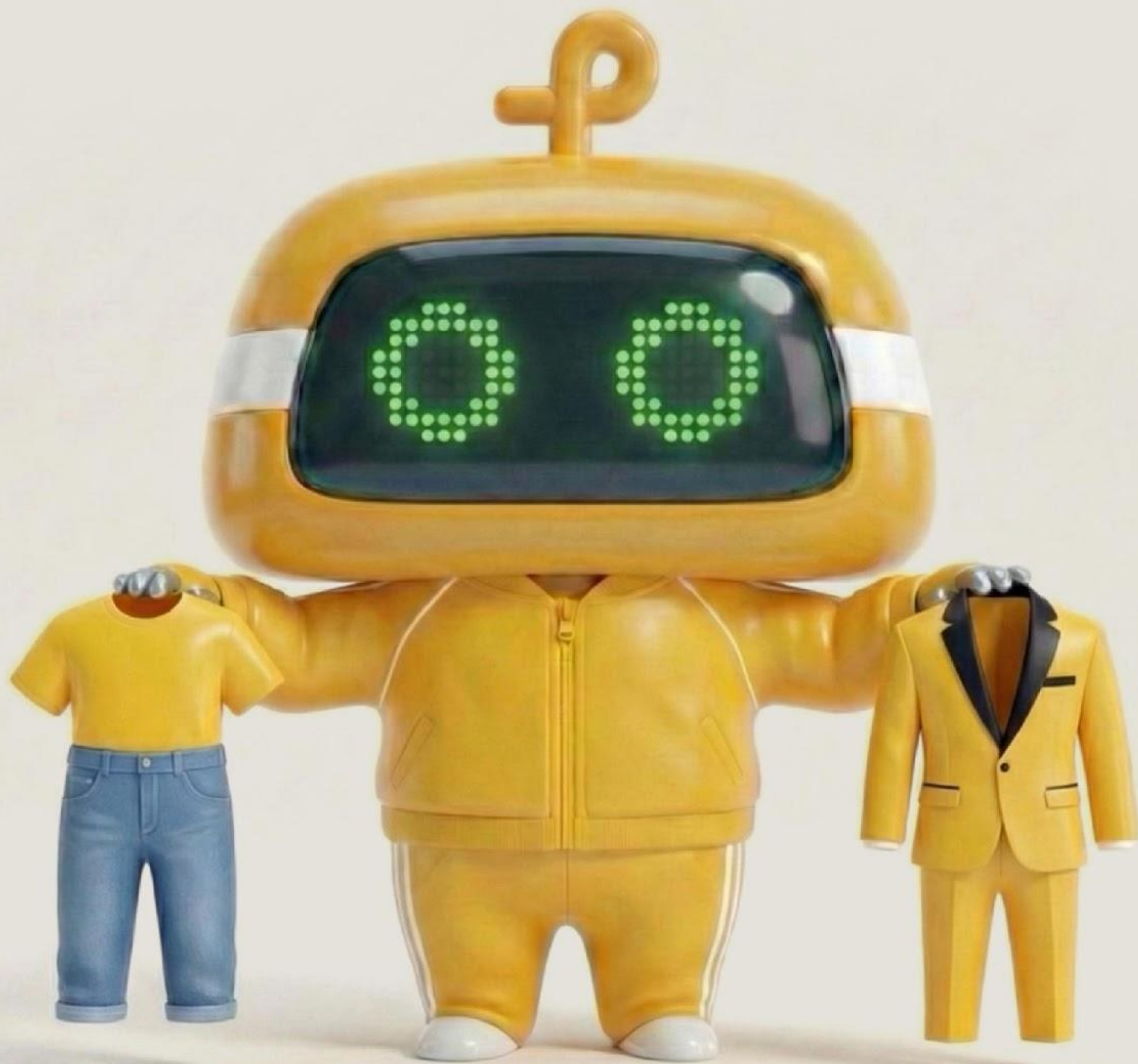
## The Power of Good Context

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

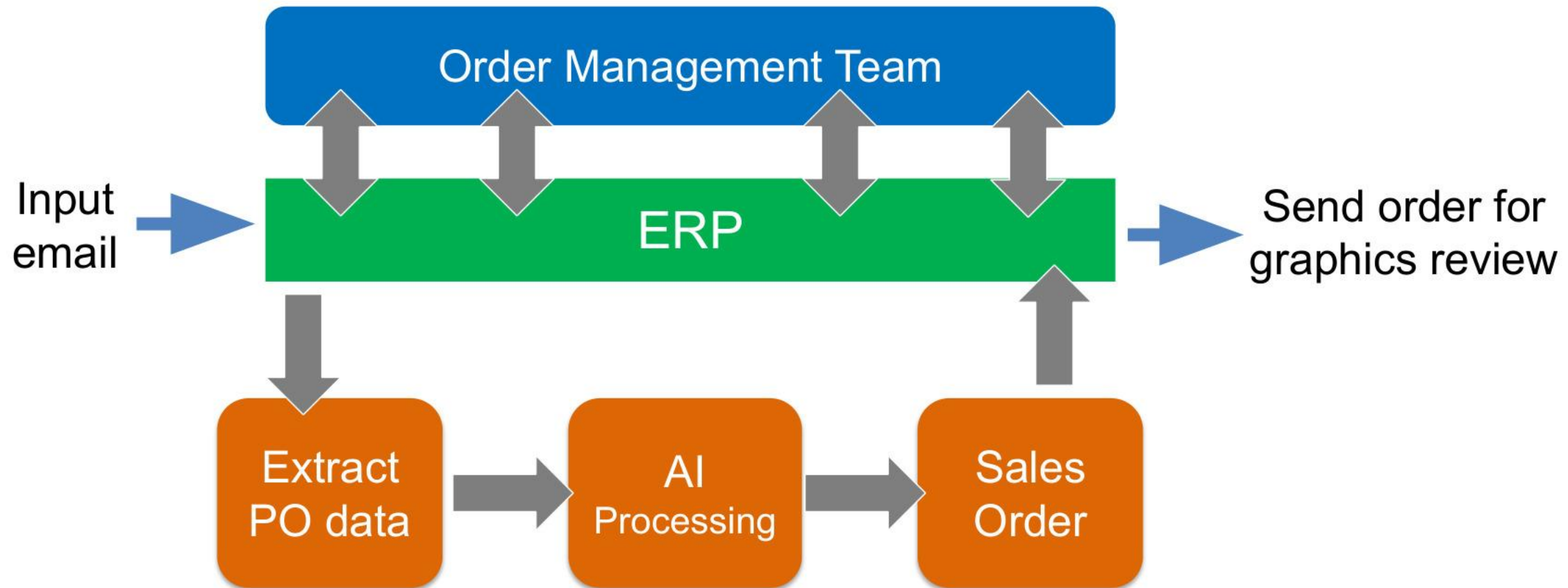
The Goal is Not 100% Success

## PARAMETERS

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

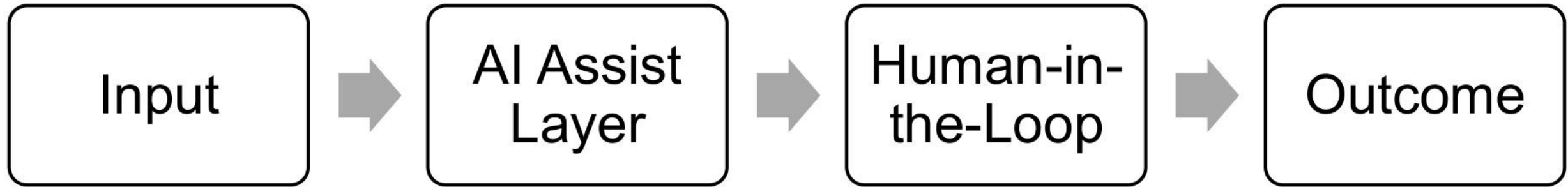
# THE SECOND CHANGE

The Goal is Not 100% Success



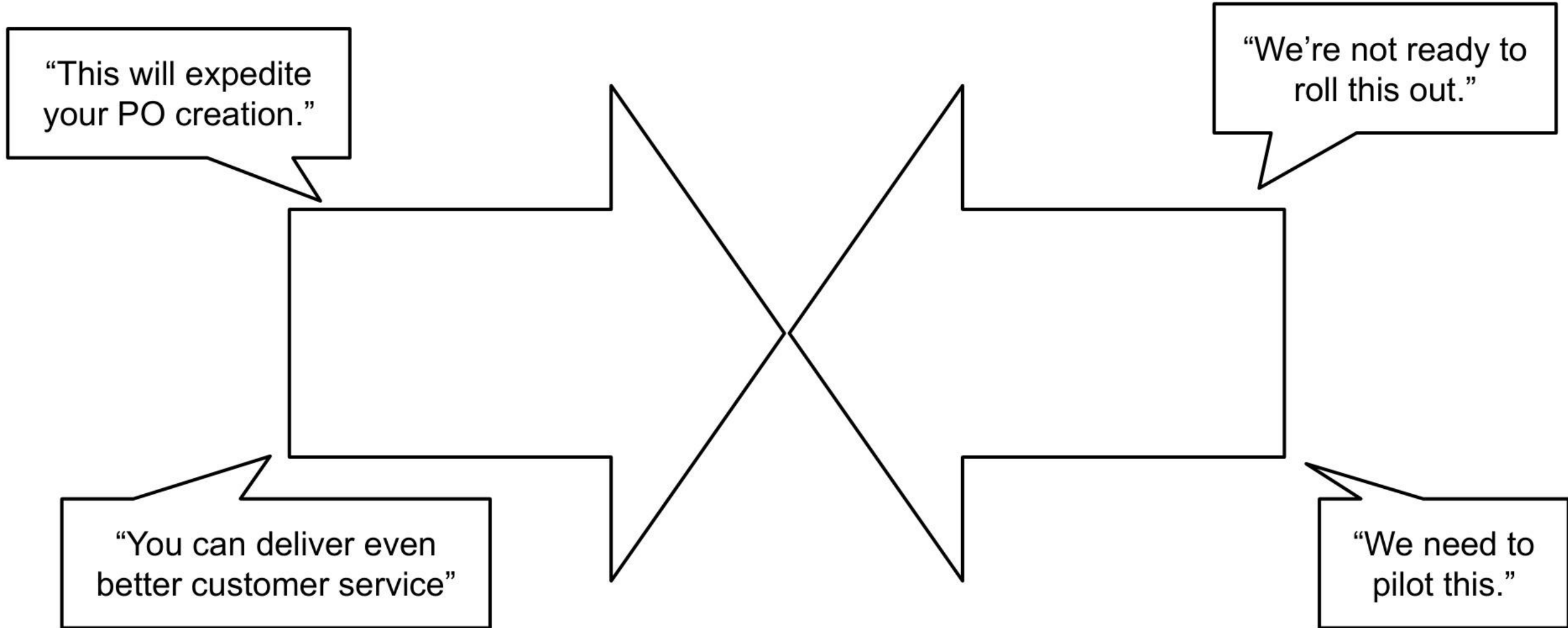
# THE AI SOLUTION

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?

Business + IT  
co-designing  
workflows



Solution



Adoption

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



**Thank you!**

[aolson@showdowndisplays.com](mailto:aolson@showdowndisplays.com)

The background is a dark blue field filled with a complex network of glowing blue lines, dots, and geometric shapes. These elements create a sense of depth and movement, resembling a digital or futuristic environment. The lines and dots are interconnected, forming a web-like structure that spans the entire frame. The overall aesthetic is high-tech and modern.

**DAY 3: TUESDAY FEBRUARY 3, 2026**



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## TECH SUMMIT

# 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](mailto: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



10 days, 23 hours and 20 seconds

Change HealthCare - OPTUM Group - United HealthCare Group

Visits: 1626

Data Size: 4TB

Published: False

### 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

## 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.


ddress	Fake location
ic29cb4cfe69 (bbshark.eth) 937a3b48418	Texas, USA
i3e3e5a8792 4c9e87753493	California, USA
9dc59652203d 801529eaca5 8ec3306d959	Toronto, CA
aed032c982a i1ea915e4d8	California, USA
15399a6b5334 8f41dc44bd (gsolter.eth)	Texas, USA
801529eaca5 db6faa052880	Vancouver, CA
db9c172a3a9b	Michigan, USA

8:35 AM · Jul 2, 2025 · 876K Views



## Public Service Announcement

FEDERAL BUREAU OF INVESTIGATION



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

**North Korean IT Workers Conducting Data Extortion**

3I) is providing an update to previously shared s Republic of Korea (North Korea) Information awareness of their increasingly malicious activity, tion. FBI is warning the public, private sector, and orean IT workers' continued victimization of US- addition to data extortion, FBI has observed North access to company networks to exfiltrate e cyber-criminal activities, and conduct revenue- ime.

PRESS RELEASE

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

Monday, June 30, 2025

For Immediate Release

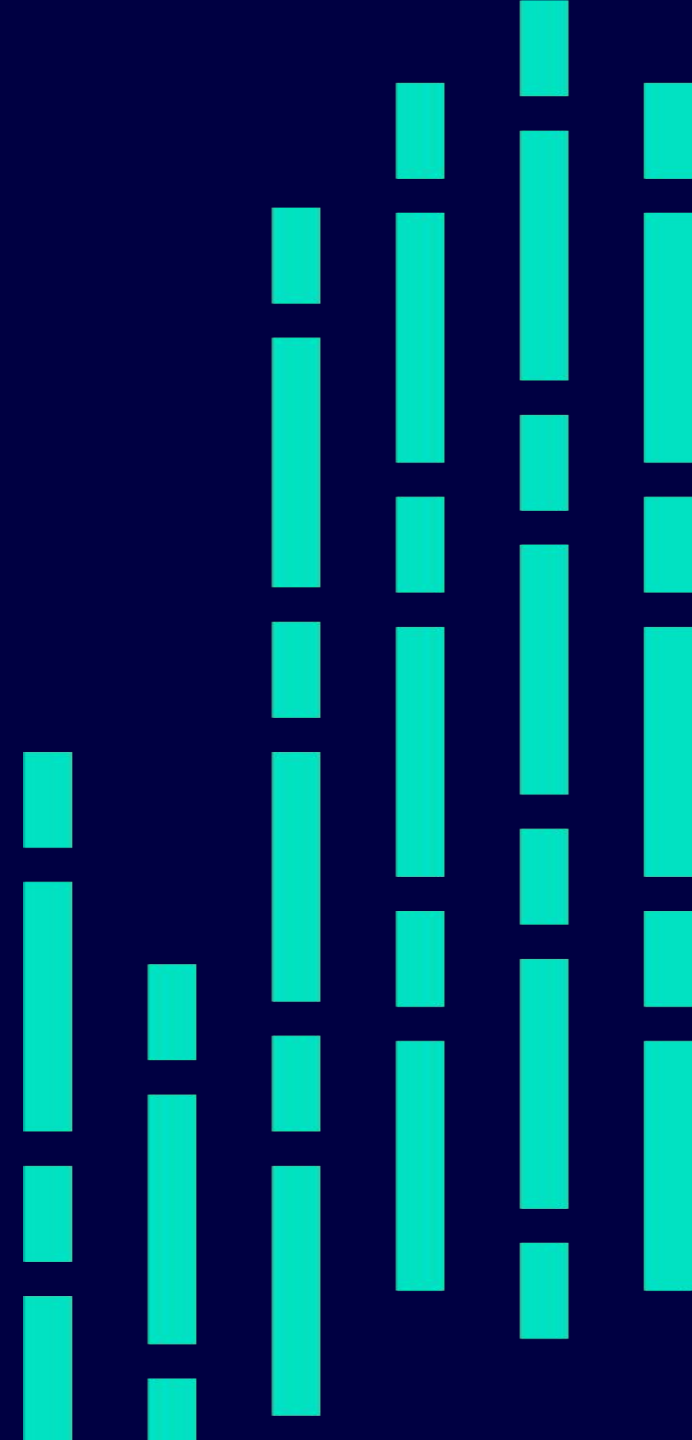
PRESS RELEASE

### 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

McDermott Will & Schulte

178

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**

**Stephen Reynolds, CISSP, CIPP/US**

Associate

Partner

Dentons LLP

McDermott Will & Schulte

alexis.martinez@dentons.com

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.

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

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



# 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	[ROLE]
Describe	[INPUT]
Ask for output	[STEPS]
Act as a	[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



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# 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

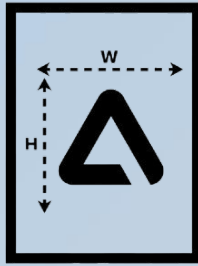
- Life long technologist and software developer
- Avid surfer, chess player, and bird watcher
- From Christchurch, New Zealand



# Stablein Solutions



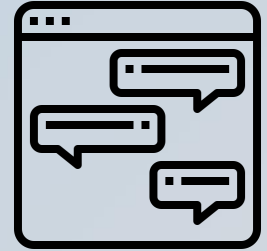
**>2k POs / Day**



**>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

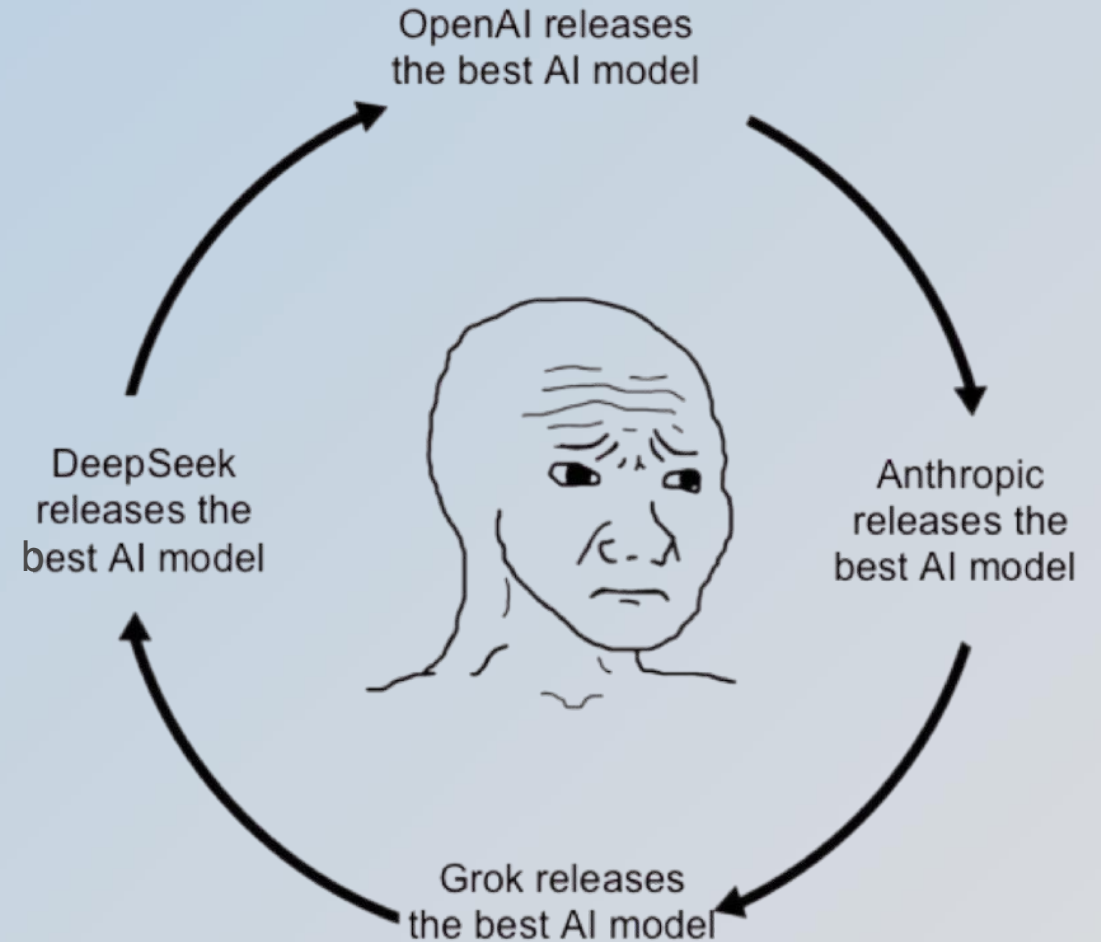
## Late 2025

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.

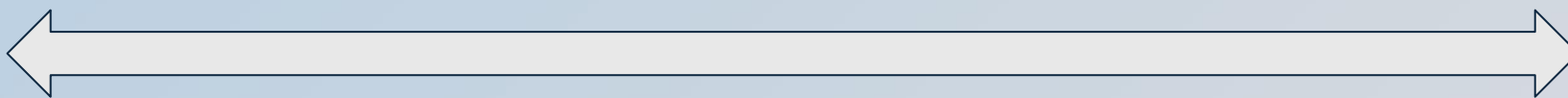


# Keeping Up with Change

Social Media & Online  
Narratives

Benchmarks and  
Leaderboards

Structured Evaluation



Hype Prone

Hype Proof



# Online Content

## Reddit

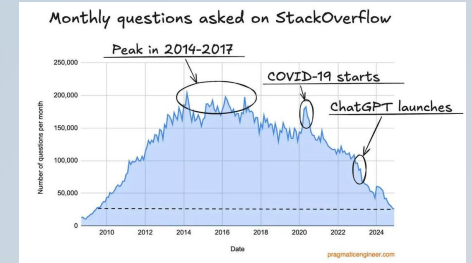
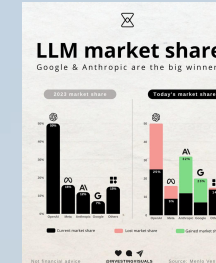
Many active communities discussing models (r/LLM, r/OpenLLama, r/ArtificialIntelligence), mix of low quality (but often entertaining) and high quality content.

## 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.



# Leaderboards & Research

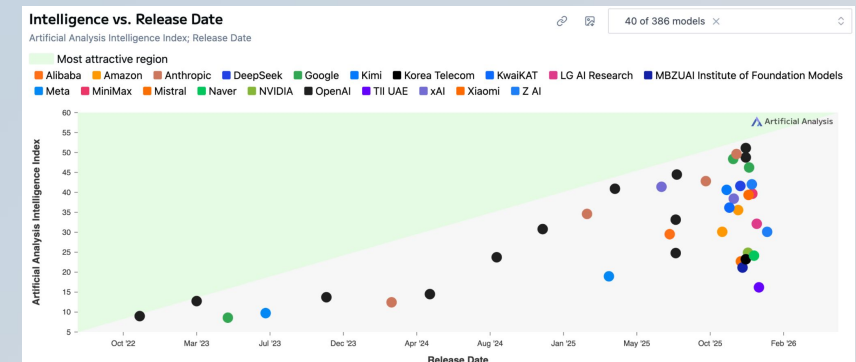
## LMarena.ai

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

Text 6 days ago				Code 7 days ago			
Rank ↑	Model ↑	Score ↓	Votes ↑	Rank ↑	Model ↑	Score ↓	Votes ↑
1	🐣 gemini-3-pro	1490	27,827	1	🐣 claude-opus-4-5-20251101-...	1510	6,717
2	🐣 grok-4.1-thinking	1477	27,985	2	🐣 claude-opus-4-5-20251101	1478	6,326
3	🐣 gemini-3-flash	1472	13,245	3	🐣 gpt-5.2-high	1477	1,691
4	🐣 claude-opus-4-5-20251101-...	1470	19,898	4	🐣 gemini-3-pro	1467	13,138
5	🐣 claude-opus-4-5-20251101	1467	21,241	5	🐣 gemini-3-flash	1450	6,563
6	🐣 grok-4.1	1465	32,015	6	🐣 glm-4.7	1447	4,833

## ArtificialAnalysis.ai

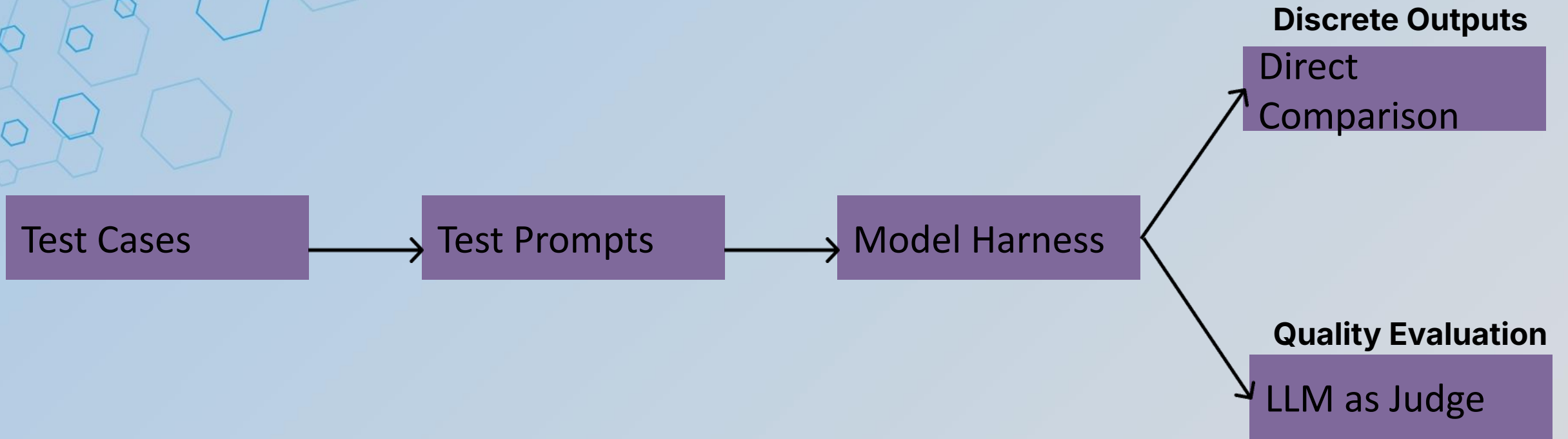
Best for - comparing cost, speed and capabilities of many models.



## 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

ACME Promos  
1234 Carey St  
Best Town, CO 80237  
123-456-7890  
acmepromo@gmail.com  
acmepromo.com

### Purchase Order

VENDOR  
Acme Printers  
123 1st Street  
Tampa, FL 01843

SHIP TO  
John Doe  
1234 Street Ave.  
City, CO 80237

P.O. NO. 9999999  
DATE 07/11/2025

## 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

<b>GPT5.2</b>							
<b>Gemini 3</b>							
<b>Opus 4.5</b>							
<b>Llama 3b</b>							
<b>Mistral 3b</b>							

# Model Evaluation - Grid Approach

Test Cases - Iterations

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.**





# 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:

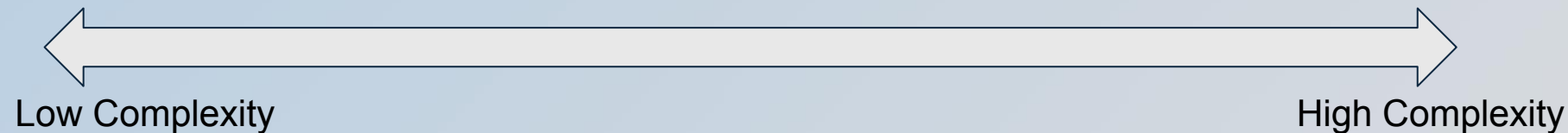
- Atomic
- Deterministic
- Clear Failure Conditions

## Prompt Chains & Tool Abstractions:

- Structured Orchestration
- Consensus mechanisms
- Tools & Skills

## Agentic Systems:

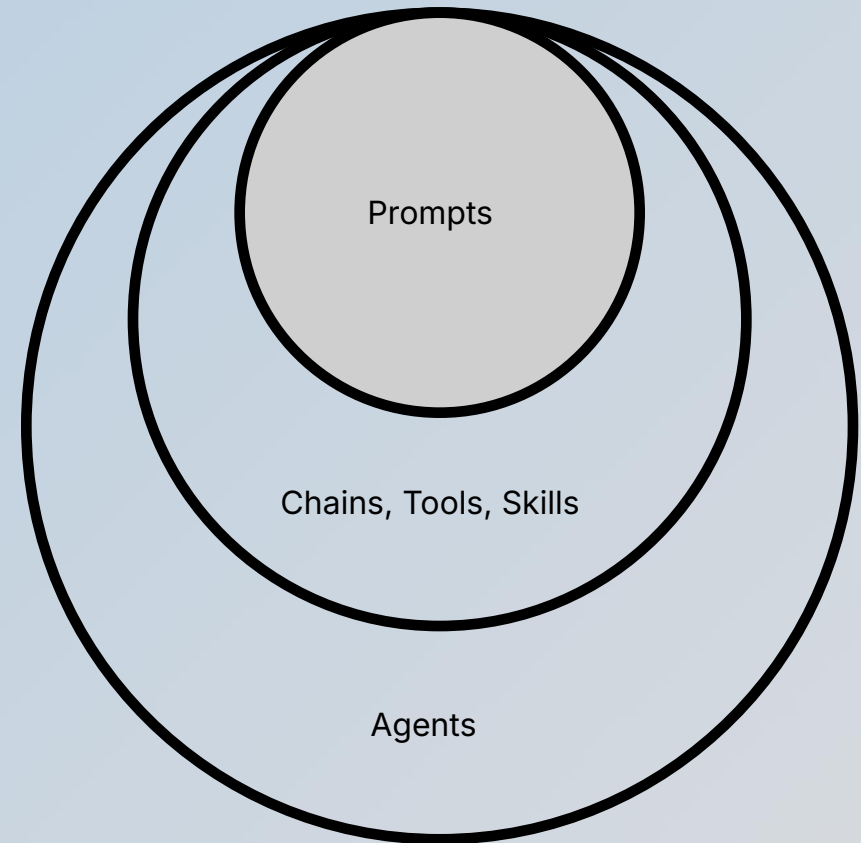
- Long running tasks with non-deterministic output
- Autonomous research
- Abstract goals vs discrete tasks





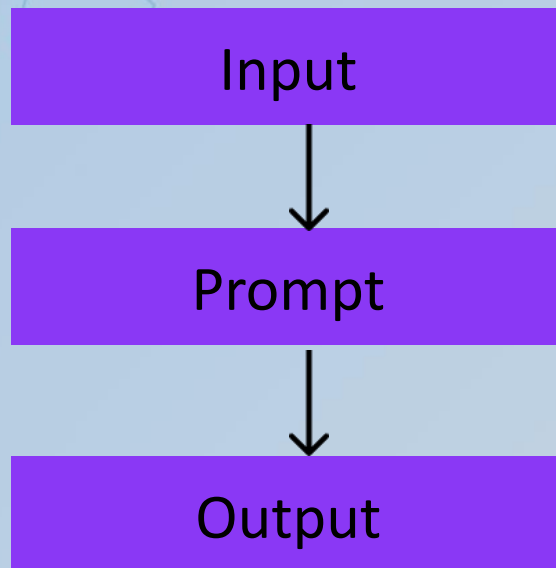
## Gradually Increase Complexity

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

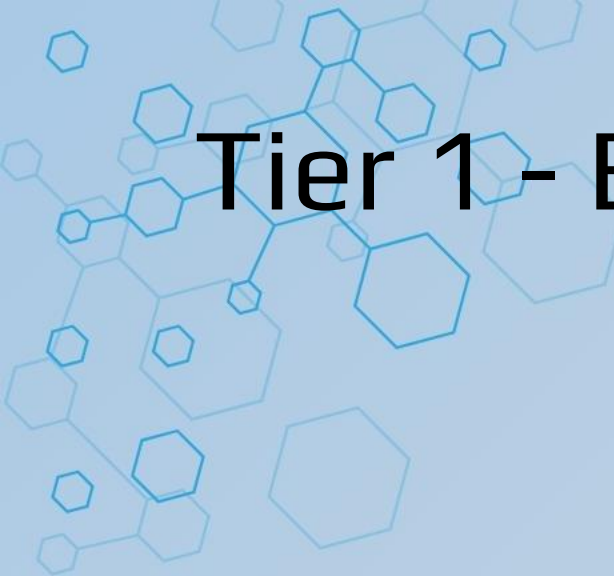
## Cons

- 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

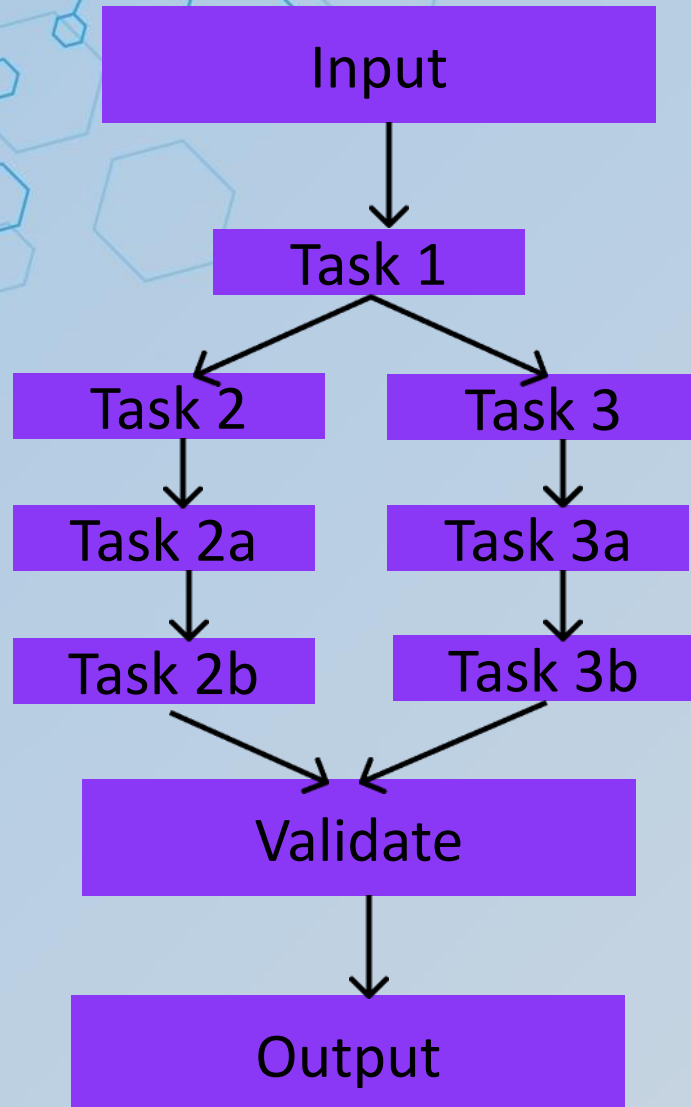
Start simple, add complexity as the problem demands it.



# Tier 1 - Example

Example: Rewrite supplier product descriptions to be customer friendly.

# Tier 2 - Chains



## Characteristics

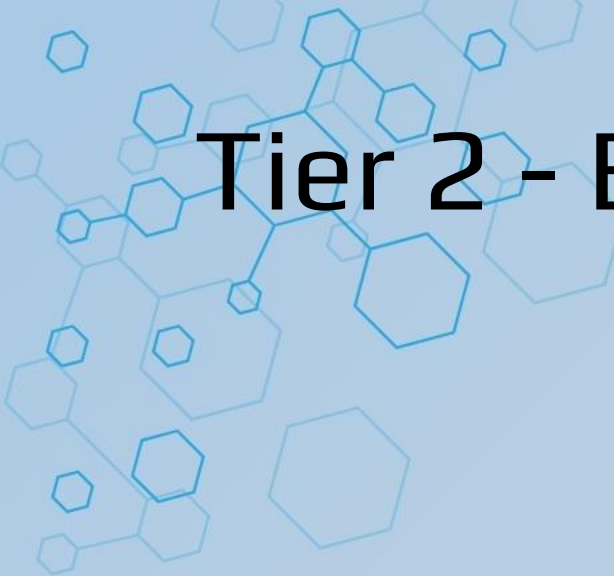
- Tasks broken up into sub tasks
- Each step has single responsibility
- Outputs from steps as inputs to future steps
- Known pathways

## 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

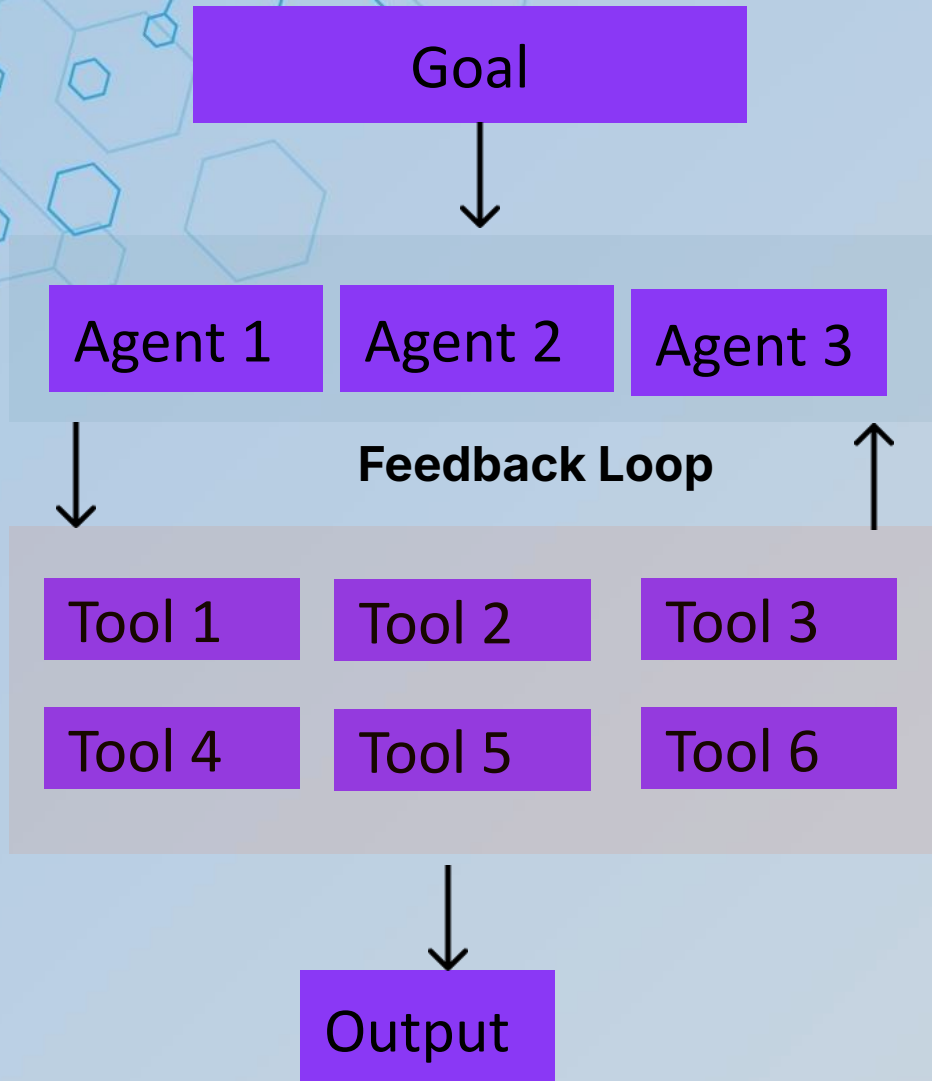


# Tier 2 - Example

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

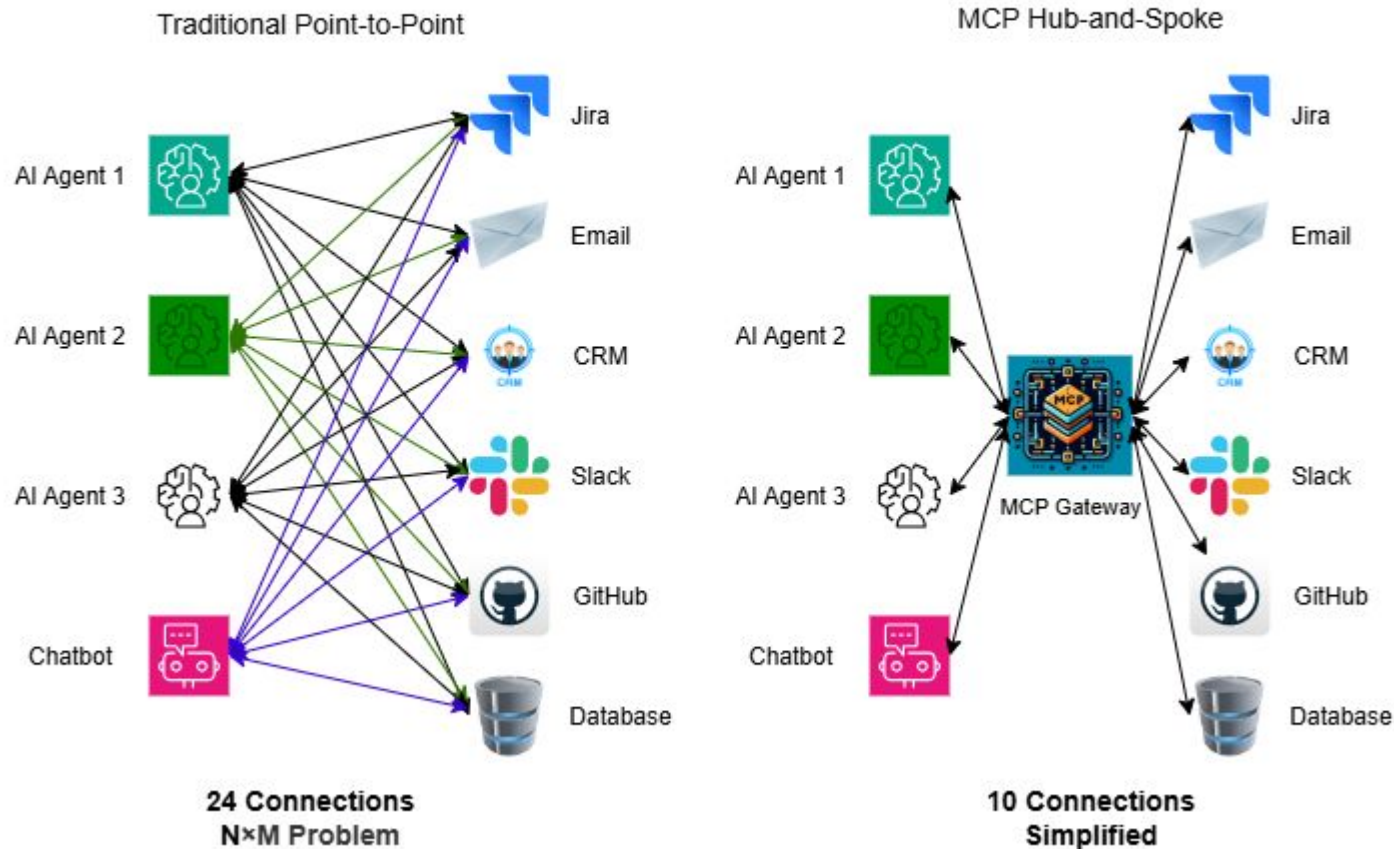


## Tier 3 - Example

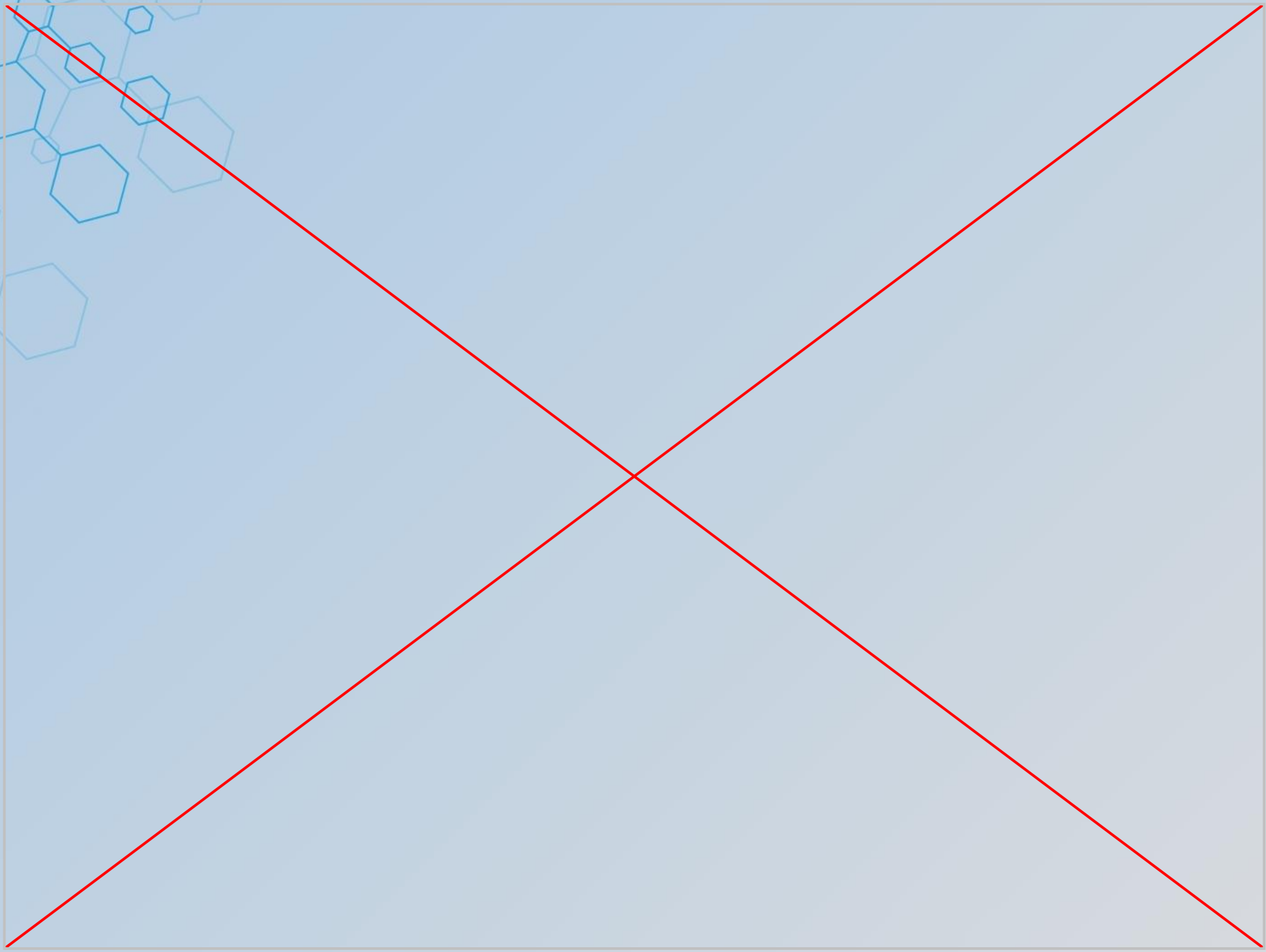
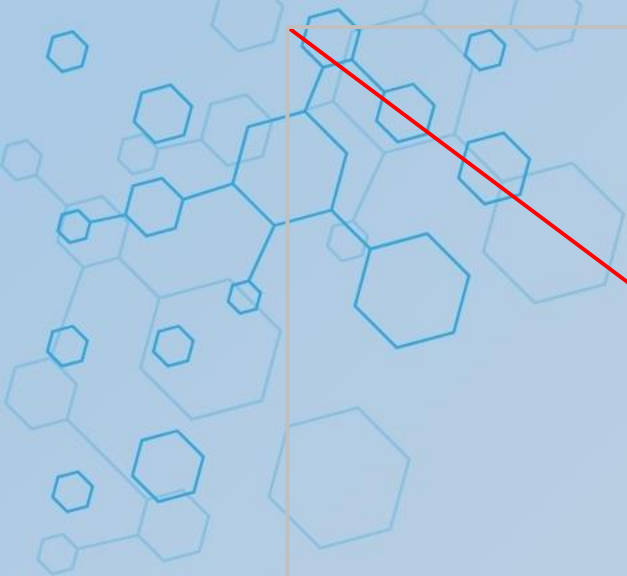
Generate user-tailored marketing content

# 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.





# Agentic Systems - Our Approach

Teams, Slack,  
Clade Desktop

MCP Server

Purchase  
Orders

Artwork

Search

Customer  
Service

Internal Data



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## 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  
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## **AI in E-Commerce: Why Projects Fail**

Table 1

## **Selling with 3D Models**

Table 2

## **POD (units of 1) through PromoStandards**

Table 3

## **The Future Is On-Demand**

Table 5

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Table 4

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## **Building and leading effective teams**

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## **Best Practices**

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## **Membership / Volunteer**

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## **PromoStandards Complaints & Suggestions**

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## **New Standards**

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## **NetSuite ERP**

Table 20

## **commonsku**

Table 24

## **Product Media**

Table 6

## **SanMar**

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## **Antera Software USA**

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## **Hit Promo**

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## **Koozie Group**

Table 26

## **S&S Activewear**

Table 17

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## February 1st - 3rd 2027

### Wyndham Grand, Clearwater FL



The background is a dark blue gradient filled with a complex network of glowing blue lines, dots, and geometric shapes. These elements create a sense of depth and movement, resembling a digital or futuristic environment. The lines and dots are interconnected, forming a web-like structure that spans the entire frame. The overall aesthetic is high-tech and modern.

**DAY 4: WEDNESDAY FEBRUARY 4, 2026**

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