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# PROMO AI TOOLKIT

5 AI Tactics to Speed Up,  
Stand Out, & Get Strategic

The background features a light blue and pink gradient. Overlaid on this are faint, semi-transparent graphics of a bar chart and a line graph with circular data points, suggesting data analysis and business performance.

## Facilisgroup's Promo AI Toolkit

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## HOW TO USE THIS TOOLKIT

In this toolkit, you'll find 5 AI tactics specific to promo use cases that are easy to implement. For each tactic, you'll find instructions, ready-to-use prompts, and advanced techniques or tips to get better results, faster.

### Start With What You Need Today

You don't need to read this front to back. Jump to the section that solves a problem you're dealing with right now. Have a client presentation tomorrow? Start with Tactic 1 (Mockups). Quoting an RFP this week? Go to Tactic 2 (Pricing). Need to train a new hire but haven't documented your processes? Tactic 3 (SOPs) is your starting point.

### When to Use Each Section

**Tactic 1: Promo Mockup Guide:** Use when you need to create product visuals for a client pitch, proposal, or presentation. Best for sales reps preparing for client meetings or responding to product inquiries.

**Tactic 2: Pricing & Margin Analysis:** Use when comparing suppliers, quoting an RFP, or reviewing your margins. Best for owners, sales leaders, and anyone involved in pricing decisions. Run the Margin Health Check monthly.

**Tactic 3: Brain Dump to SOP Toolkit:** Use when you need to document a process, onboard a new hire, or build training materials. Best for owners and managers. Set up Claude Cowork once, then use it every time you need a new SOP.

**Tactic 4: Daily AI Workflow Cheat Sheet:** Use every day. This is the section your whole team should adopt. Pick one prompt, use it daily for a week, then add another. Within a month, AI becomes second nature.

**Tactic 5: 25 Questions for Your Data:** Use weekly, monthly, and quarterly. Save the three report templates and run them on a recurring schedule. Start with the Weekly Sales Summary next Monday morning.

### Two things to keep in mind before you get started...

1. AI shouldn't completely replace humans – especially in promo. While AI can augment human productivity, remember that human creativity and a consultative approach help you stand out in this industry.
2. Be careful with the information you upload to AI platforms. A good rule of thumb: if you wouldn't want your competitor to see it, don't upload it. Once you upload something, that information is out there for good. This is why we highly recommend establishing an AI usage policy at your business before diving in, which can be found at the end of this toolkit.

# PROMO MOCKUP GUIDE

Creating Next Level Product Mockups

Your copy-paste prompt templates for creating professional product mockups and lifestyle images with AI. Use these with ChatGPT 5.4 or Google Gemini Nano Banana 2 (April 2026)

## Why This Matters for Your Business

Your clients make buying decisions based on what they can see. When you send a flat catalog image and say "imagine your logo here," you're asking them to do the work. Meanwhile, the distributor who sends a polished mockup showing their logo on the actual product in a real setting wins the deal. AI-generated mockups level the playing field. They let a 10-person shop present with the same visual polish as a team with an in-house design department, and they compress what used to be a multi-day process into under 60 seconds. The speed advantage compounds: faster mockups mean faster client decisions, shorter sales cycles, and more presentations per week.

## The Prompt Formula

Every great mockup prompt follows this structure:

**[Product] + [Branding] + [Setting] + [Style]**

Ideally, you are able to upload the images of your product, logo, and person/scene directly within your prompt. This will produce the best results. However, if you have to go off only descriptions, use some of the prompts below.

## Product Category Prompts

Replace [COLOR] with your client's brand colors. Copy, paste, and generate.

### Drinkware

#### Prompt 1

A stainless steel insulated tumbler in [COLOR] with a small [COLOR] embossed logo on the front, photographed on a clean white background, product photography lighting, high resolution

#### Prompt 2

A ceramic coffee mug in [COLOR] with a [COLOR] printed logo on both sides, sitting on a wooden desk next to a laptop, lifestyle office photography

#### Prompt 3

A set of 4 branded water bottles in [COLOR] with [COLOR] screen-printed logos, arranged in a row on a gym bench, fitness lifestyle photography

### Apparel

#### Prompt 1

A [COLOR] quarter-zip pullover fleece with a small [COLOR] embroidered logo on the left chest, photographed flat-lay on a wooden surface, product photography

#### Prompt 2

A [COLOR] polo shirt with a [COLOR] embroidered logo on the left chest, worn by a professional in a modern office setting, lifestyle photography

#### Prompt 3

A [COLOR] baseball cap with a [COLOR] embroidered logo on the front panel, photographed on a white background at a slight angle, product photography with soft shadows

## Bags & Totes

### Prompt 1

A [COLOR] canvas tote bag with a large [COLOR] screen-printed logo on the front pocket, hanging on a coat hook in a bright office entryway, lifestyle photography

### Prompt 2

A [COLOR] laptop backpack with a small [COLOR] embroidered logo on the front zipper pocket, photographed on a clean white background, e-commerce product photography

### Prompt 3

A [COLOR] drawstring bag with a large [COLOR] printed logo on the center, laid flat on a conference table next to event badges, trade show lifestyle photography

## Tech Accessories

### Prompt 1

A [COLOR] wireless charging pad with a [COLOR] printed logo in the center, sitting on a minimalist desk next to a smartphone, modern office lifestyle photography

### Prompt 2

A [COLOR] branded power bank with a [COLOR] laser-engraved logo on the front face, photographed on a white background, clean product photography with soft shadows

### Prompt 3

A pair of [COLOR] branded earbuds in a charging case with a small [COLOR] printed logo on the lid, photographed on a marble surface, premium product photography

## Office & Writing

### Prompt 1

A [COLOR] metal pen with a [COLOR] laser-engraved logo on the barrel, photographed on a leather notebook, executive lifestyle photography

### Prompt 2

A [COLOR] hardcover branded notebook with a [COLOR] debossed logo on the cover, photographed flat-lay on a clean desk with a coffee cup, minimalist lifestyle photography

### Prompt 3

A set of branded sticky notes and pen in a [COLOR] desk organizer with a [COLOR] printed logo, photographed in a bright home office setting, lifestyle photography

## Lifestyle Scene Prompts

Use these to show products in context, not just on a white background. Replace [PRODUCT] with your specific item.

### Trade Show Booth

A branded [PRODUCT] displayed prominently on a modern trade show booth table with banner stands in the background, trade show floor lighting, event photography style

### Corporate Gifting

A premium gift box containing a branded [PRODUCT], tissue paper, and a thank-you card, photographed from above on a marble surface, luxury unboxing photography

### Employee Onboarding Kit

A welcome kit with a branded [PRODUCT], notebook, pen, and water bottle arranged neatly in a branded box on a new employee's desk, bright and welcoming office photography

### Client Appreciation

A branded [PRODUCT] with a handwritten thank-you note on an executive desk, warm afternoon lighting through office windows, premium lifestyle photography

### Team Event

A group of professionals at an outdoor company event wearing branded [PRODUCT], casual and energetic atmosphere, candid event photography style

### Holiday Gift Set

A holiday-themed gift set featuring a branded [PRODUCT] alongside seasonal decorations on a wooden table, warm holiday lighting, festive lifestyle photography

## Advanced Prompt Techniques

Level up your mockups with these additional modifiers you can add to any prompt:

- **Specify camera angle:** "photographed from above at 45 degrees" or "straight-on product shot" or "hero angle slightly below eye level"
- **Add context items:** "next to a MacBook and coffee cup" or "surrounded by confetti and ribbon" to tell a story
- **Control the mood:** "warm golden hour lighting" vs. "bright clean studio lighting" vs. "dramatic side lighting with shadows"
- **Request specific styles:** "in the style of Apple product photography" or "editorial magazine style" or "Instagram flat-lay aesthetic"
- **Multi-product compositions:** "a curated gift set containing a tumbler, notebook, and pen arranged on a wooden tray, overhead shot"

**PRO TIP:** AI mockups are for concept selling and initial presentations, not final production proofs. Colors and logo placement won't be exact. Position these as a "get to yes faster" tool. For iterating on a mockup, tell AI what to change: "Same product, but change the background to a conference room" or "Make the logo larger and centered."

**Need something quick?** With Syncore's **Easy Mockup Tool**, you can quickly place and resize logos on existing product images (from ESP) to customize Proposals for prospects.

# PRICING & MARGIN ANALYSIS PROMPT PACK

Smarter Pricing: Analyze Margins & Detect Inefficiencies

Copy-paste prompts for comparing supplier pricing, analyzing your margins, detecting inefficiencies, and accelerating RFP responses. Best used with your LLM of choice (Claude, ChatGPT, Gemini, Perplexity, etc.)

## Why This Matters for Your Business

YMargins are tighter than they've been in years. PPAI research shows 30% of distributors reported margin declines over the past year, with tariffs (56.8%), freight costs (54.3%), and reduced client budgets (50.6%) all squeezing profitability. At the same time, over 55% of distributors say their buyers are more price-sensitive. In this environment, the distributors who protect their margins aren't the ones working harder. They're the ones with better visibility into their pricing. AI turns supplier comparison from a 30-minute spreadsheet exercise into a 2-minute automated analysis, and it catches the margin leaks you'd never spot manually across hundreds of orders.

## SECTION 1: SUPPLIER PRICE COMPARISON

Upload 2-3 supplier price sheets (Link, PDF or Excel) to your LLM, then use these prompts.

### Basic Comparison Table

I've uploaded price sheets from [SUPPLIER 1] and [SUPPLIER 2] for [PRODUCT CATEGORY]. Create a comparison table showing: product name, unit cost at 100/500/1000 quantities, setup fees, available decoration methods, and shipping estimates. Highlight the lowest cost option at each quantity break.

### Decoration Cost Comparison

Compare the decoration and imprint costs across these supplier price sheets. Include setup fees, run charges per color/location, and any minimum order requirements. Which supplier offers the best value for a typical order of [QUANTITY] units with [NUMBER]-color imprint?

### Total Landed Cost Analysis

Calculate the total landed cost per unit for an order of [QUANTITY] units of [PRODUCT] from each supplier. Include unit cost, setup fees, decoration charges for [DESCRIPTION], and estimated shipping to [LOCATION]. Present as a side-by-side comparison with the all-in cost per unit.

### Quick Supplier Summary

Summarize each supplier's price sheet in 3-4 bullet points covering: price competitiveness, decoration capabilities, minimum order quantities, and any standout advantages or disadvantages. Which supplier would you recommend for a [SIZE] order and why?

## SECTION 2: MARGIN ANALYSIS & INEFFICIENCY DETECTION

Export your quoting or order data to CSV/Excel, upload it to your LLM, then use these prompts.

### Margin Health Check (Run Monthly)

Here's my order/quoting data for the past [TIME PERIOD]. For each order, calculate the margin percentage. Then show me: (1) Average margin across all orders, (2) Orders with margins below [TARGET]%, (3) Average margin by product category, (4) Average margin by client. Flag any concerning patterns.

### Margin Trend Analysis

Analyze my order data over the past 12 months. Are my margins trending up or down? Break this down by quarter and by product category. Identify which categories are improving and which are eroding. Are there specific clients where margins are consistently low?

### Pricing Inefficiency Detector

Based on this order data, where am I most likely undercharging? Look for: (1) Orders where my margin is significantly below my category average, (2) Clients who consistently get lower margins than other clients for similar products, (3) Product categories where I should consider raising my standard markup, (4) Any pattern of margin erosion over time that suggests I'm not passing through cost increases. Give me specific, actionable recommendations.

### Client Profitability Ranking

Rank my clients by total profit contribution (not just revenue). For each of my top 20 clients, show: total revenue, total profit, average margin %, number of orders, and average order size. Are my biggest revenue clients also my most profitable? Highlight any clients where high revenue masks low profitability.

**PRO TIP:** Run the Margin Health Check once a month. Small margin improvements across hundreds of orders compound into significant revenue. A 2% average margin improvement on \$3M in annual orders is \$60,000 in additional profit.

## SECTION 3: RFP RESPONSE ACCELERATION

Upload the RFP document (PDF) to your LLM of choice, then use these prompts.

### RFP Requirements Extraction

I've uploaded an RFP for promotional products. Extract all line items into a structured table with columns for: item number, product description, quantity requested, decoration requirements, delivery deadline, and any compliance/specification requirements. Flag anything unusual or that needs clarification.

### RFP Response Worksheet

Based on the extracted RFP requirements, create a sourcing worksheet. For each line item, include: the product specs needed, suggested supplier categories to check, quantity breaks to quote, and key compliance notes. Organize by product category so I can batch my supplier outreach.

### RFP Compliance Checklist

Review this RFP and create a compliance checklist. What are all the requirements I need to meet? Include: submission format, required certifications, insurance minimums, delivery timelines, pricing format requirements, and any disqualifying criteria.

**Wish you could see pricing and margin analysis quickly – without uploading your data?**

Syncore has a detailed Sales Analysis Report that lets you see sales, costs, and margins for every order. To identify patterns, you can filter by company or sales rep, too.

And on an order-by-order basis, Syncore makes it easy to find the best pricing and set margins accordingly. Our product search lets you filter by Preferred Suppliers to ensure you're finding high-margin products. And when you're putting together Quotes, margins are clearly visible so you can adjust to align with your pricing strategy.

 [See how Prosperity Promotions increased their margins by 2% in their first year with Facilisgroup.](#)

# BRAIN DUMP TO SOP TOOLKIT

Turn Tribal Knowledge into SOPs: Document Processes Without the Busywork

A step-by-step system for turning the knowledge in your head into professional documentation. Includes instructions for both Claude Cowork and general LLM project features.

## Why This Matters for Your Business

Every distributor has processes that live in one person's head. When that person is out sick, on vacation, or leaves the company, the process goes with them. For distributors in the \$2M to \$10M range, this is one of the biggest operational risks: you're past the size where everyone can just figure it out, but you don't have the resources to hire someone to document everything. The Brain Dump Method solves this by removing the biggest barrier to documentation: the writing. You don't have to write anything. You just talk for 10 minutes and AI turns that into a professional SOP. Distributors who document their top 10 processes this way can onboard new hires faster, reduce errors, and eliminate single points of failure across their operation.

## The Brain Dump Method: Step by Step

### Step 1: Pick Your Process

Choose the process that would cause the most pain if the person who owns it were unavailable for a week. Don't try to do everything at once.

### Step 2: Record Yourself

Open Voice Memos (iPhone) or Recorder (Android). Hit record. Or use speak-to-text into a Word Document. Explain the process as if you're training a new hire sitting next to you. Talk for 5-10 minutes. Don't worry about being organized.

### Step 3: Get Your Transcript

Use your phone's built-in transcription, or Otter.ai for automatic transcription (free, 300 min/month). You now have raw text.

### Step 4: Feed It to AI

Use Claude Cowork (Path A below) or any LLM with the "Projects" feature (Path B below) to transform your transcript into a polished SOP.

### Step 5: Create Variations

Use the variation prompts below to turn your SOP into training materials, checklists, and reference cards.

## PATH A: CLAUDE COWORK

Claude Cowork is a desktop tool that lets Claude work directly with files on your computer. It removes the copy-paste friction and lets you build an SOP library over time.

### How to Set Up

1. Download Claude Desktop from [claude.ai/download](https://claude.ai/download) if you haven't already.
2. Open Claude Desktop and navigate to Cowork (look for it in the interface).
3. Create a folder on your computer called "Company SOPs" (or whatever you prefer).
4. Point Cowork at that folder so Claude can read and write files there.
5. Drop your transcript file (.txt or .doc) into the folder.
6. Give Claude this instruction:

#### COWORK SOP INSTRUCTION

Read the transcript file in this folder. Create two new documents: (1) A professional step-by-step SOP with numbered steps, clear action items, and decision points marked. Include a header with process name, owner, last updated date, and tools needed. (2) A separate one-page checklist version a new hire could follow. Save both to this folder. Also note any steps that seem unclear or incomplete that I should clarify.

**Why Cowork is worth the setup:** Cowork saves files directly to your computer, makes the process repeatable (drop in a new transcript, run the instruction, get a new SOP), and over time you build a complete library of documented processes directly on your computer. For distributors wanting to document 5-10 processes, this is significantly faster than copy-pasting.

## PATH B: CLAUDE/OTHER LLM PROJECTS FEATURE

If you prefer not to use Cowork, the projects approach works just as well. Open Claude or any LLM of your choice that has a Projects-like feature in your browser, paste your transcript, and use this prompt:

#### PROJECT SOP PROMPT

Here's a transcript of me explaining our [PROCESS NAME] workflow. Please: 1. Turn this into a professional, step-by-step Standard Operating Procedure (SOP) with numbered steps, clear action items, and decision points clearly marked. 2. Create a separate one-page checklist version that a new hire could follow. 3. List any steps that seem unclear, incomplete, or that I may have skipped. Ask me clarifying questions so I can fill in the gaps. 4. Suggest a header/metadata section including: process name, owner, last updated date, estimated time to complete, and tools/systems needed. Format the SOP professionally with clear headers and sub-steps.

### Variation Prompts

Once you have your SOP, use these to create additional materials from it.

#### Role-Specific Version

Take this SOP and create a version specifically for [ROLE: CSR / Sales Rep / Production / Finance]. Only include the steps relevant to their role, and add any role-specific notes or tips. Remove steps they don't need to worry about.

### Training Quiz

Based on this SOP, create a 10-question training quiz that tests whether a new hire understands the key steps, decision points, and common mistakes. Include an answer key. Mix question types: multiple choice, true/false, and short answer.

### Quick Reference Card

Condense this SOP into a single-page quick reference card that someone could print and keep at their desk. Use a two-column layout. Include only the essential steps, key decision points, and important contact info or system names. This should be scannable in 30 seconds.

### Process Improvement Review

Review this SOP as an operations consultant. Identify: (1) Steps that could be combined or eliminated, (2) Steps that could be automated, (3) Potential bottlenecks or single points of failure, (4) Missing handoff points between roles, (5) Opportunities to reduce errors. Suggest an improved version.

### Troubleshooting Guide

Based on this SOP, create a troubleshooting guide for the most common problems that arise during this process. Format as: Problem > Likely Cause > Solution. Include at least 8-10 common issues.

## Top 10 Processes to Document First

Start with whichever would cause the most disruption if the person who owns it were unavailable.

1. Order Processing - End-to-end from PO received to order shipped.
2. Client Onboarding - First order through account setup and first 30 days.
3. RFP / Quote Response - How you receive, price, and submit proposals.
4. New Supplier Setup - Vetting, paperwork, system entry, and first order.
5. Returns & Credits - Client requests through resolution and credit issuance.
6. Shipping & Tracking - Carrier selection, tracking updates, client communication.
7. Invoicing & Collections - Order completion through payment received.
8. Commission Calculation - How commissions are tracked, calculated, and paid.
9. Inventory Check & Sourcing - Checking availability and sourcing alternatives.
10. Client Reorder Campaigns - Identifying and reaching out for repeat/seasonal orders.

### Don't know if you have the right processes to scale, even if you document what you have today?

Facilisgroup Partners take advantage of Core 360 Playbooks – documented processes that outline the daily, weekly, and monthly tasks every team needs to be successful. These proven, repeatable Playbooks improve team collaboration, make it easier to train new hires, and set your business on the path to scale faster. In addition to comprehensive software, get a new philosophy on how to run your business for maximum efficiency.

 [See how HF Custom Solutions cut onboarding time by 50% and reached 100% growth in revenue.](#)

# DAILY AI WORKFLOW CHEAT SHEET

Your Daily AI Sidekick: 10x Your Daily Efficiency

Copy-paste prompts for the tasks you do every day. Save this to your desktop. Each prompt saves 10-30 minutes. These are to be used within your Claude Cowork or within your AI Project so that the responses will have contextual knowledge around your brand, SOP's, and other important information to produce great results.

## Why This Matters for Your Business

Think about all the tasks that eat your team's day: drafting proposal cover letters, writing follow-up emails, researching prospects before meetings, brainstorming product ideas for a client event, preparing for annual reviews. None of these are hard, but each one takes 15 to 30 minutes. They add up to hours every week that your salespeople spend writing instead of selling, and your CSRs spend on admin instead of serving clients. AI compresses each of these tasks to 1 to 2 minutes. A rep who uses these prompts daily saves 3 to 5 hours per week. Multiply that across your team and you're looking at the equivalent of a part-time hire, for free. But the real value isn't just speed. It's quality. Your reps show up to every call better prepared, every proposal more polished, every follow-up faster. That wins deals.

## CLIENT-FACING CONTENT

### Proposal Cover Letter

I'm sending a promotional product proposal to [CLIENT NAME], a [INDUSTRY] company with [SIZE] employees. The proposal includes [PRODUCTS] for their [EVENT/PURPOSE]. Write a professional cover letter that: references their industry, explains why these product categories fit their event, and positions us as a strategic partner. Keep it to one page. Tone: confident but not salesy.

### Post-Call Follow-Up Email

I just had a sales call with [NAME] at [COMPANY]. Here are my notes from the call: [PASTE NOTES]. Draft a follow-up email that: thanks them for their time, recaps the key points we discussed, outlines the next steps we agreed on, and suggests a timeline. Tone: warm and professional. Keep it concise.

### Client Re-Engagement (Dormant Account)

One of my clients, [COMPANY NAME] in the [INDUSTRY] space, hasn't placed an order in about 90 days. Their last order was [DESCRIPTION]. Draft a re-engagement email that: checks in naturally without being pushy, references their last order, suggests 2-3 timely reasons they might need promo products right now (seasonal, upcoming events, employee programs), and makes it easy to reply. Tone: helpful, not desperate.

### Thank You / Client Appreciation Note

I just delivered a large order for [CLIENT] - [DESCRIPTION]. Write a brief, personal thank-you email that: acknowledges the project, highlights something specific we did well, and opens the door for future work without being salesy. 3-4 sentences max.

## CLIENT RESEARCH & MEETING PREP

### Prospect Research (Before a First Meeting)

I have a first meeting tomorrow with [CONTACT NAME] at [COMPANY]. Their website is [URL]. Research this company and give me: a 3-sentence overview of what they do, their industry and approximate size, any recent news or initiatives, the types of promotional products their industry typically uses, and 3 conversation starters that show I've done my homework. Keep it to one page.

### Annual Review Prep Document

I have an annual review meeting with [CLIENT] next week. Here's a summary of what we've delivered this year: [PASTE ORDER HISTORY OR NOTES]. Help me build a one-page review document that includes: total spend this year vs. last year, top product categories ordered, 2-3 things that went well, 1-2 areas for improvement, and 3 recommendations for next year based on their ordering patterns. Format it professionally - I want to hand this to them in the meeting.

### 60-Second Call Prep

I have a call with [CLIENT] in 10 minutes. Here are our recent email threads: [PASTE]. Give me a quick brief: (1) Open orders and their status, (2) Any pending issues, (3) What I should bring up proactively, (4) Any upsell or reorder opportunities based on our history.

## CAMPAIGN IDEATION & PRODUCT BRAINSTORMING

### Event-Based Product Ideas

My client is a [INDUSTRY] company planning a [EVENT TYPE] for [NUMBER] people. Budget is approximately \$[AMOUNT] per person. Give me 5 curated promotional product ideas with: specific product suggestions, estimated price point, why it works for this audience, and a one-line pitch I can use when presenting the idea. Focus on practical, high-perceived-value items.

### Seasonal Campaign Concepts

It's [SEASON/MONTH] and I want to proactively reach out to clients with timely promo ideas. Give me 5 seasonal campaign concepts with: the theme, target audience, 2-3 product suggestions per concept, and a short email pitch I could send to relevant clients. Think beyond the obvious - I want ideas that feel fresh.

### Quick Product Alternatives

My client wants [PRODUCT] but it's out of stock / over budget / has a long lead time. Suggest 5 alternative products that achieve the same goal (brand visibility, employee appreciation, event giveaway, etc.) with similar impact. For each, explain why it's a good substitute.

## YOUR OWN BUSINESS MARKETING

### LinkedIn Post from a Project Win

I just completed a project for [CLIENT] - we delivered [DESCRIPTION] for their [EVENT/PURPOSE]. Write a LinkedIn post that: highlights the creative solution without naming the client (unless I say it's ok), positions our company as a strategic partner, and ends with a subtle call-to-action. Tone: proud but not braggy. Under 200 words.

### Client Newsletter Draft

Draft a short quarterly newsletter email to my client base. Include: a brief greeting, 2-3 trending product categories right now with why they're popular, one tip or insight about the promo industry they'd find useful, and a soft CTA to reach out if they have upcoming projects. Keep it scannable - short paragraphs, maybe a few bullet points. Under 300 words.

### Case Study from Order Data

Here are the details of a successful project: Client industry: [INDUSTRY]. Challenge: [WHAT THEY NEEDED]. Our solution: [WHAT WE DELIVERED]. Results: [OUTCOME/FEEDBACK]. Turn this into a short case study (under 250 words) formatted as: Challenge > Solution > Results. Make it compelling enough to put on our website or in a proposal.

**PRO TIP:** The fastest way to adopt AI is to pick ONE prompt from this sheet and use it every day for a week. Once it becomes second nature, add a second prompt. Within a month, you'll be reaching for AI dozens of times a day without thinking about it.

# 25 QUESTIONS TO ASK YOUR BUSINESS DATA

AI + Your Data = Better Decisions

**CRITICAL: Upload your own business and client data to AI tools at your own risk. A good rule of thumb is "If I didn't want my competitors to have this data, I shouldn't upload it to AI".**

Export a CSV from your CRM or order management system, upload it to your LLM of choice, or add it to your Claude Cowork folder, and start asking. These prompts are ready to copy-paste. Includes three recurring report templates you can save and reuse weekly, monthly, and quarterly.

## Why This Matters for Your Business

Most distributors are sitting on years of sales data, order history, and client information, but they don't have the time, tools, or analysts to extract insights from it. Strategic decisions get made on instinct rather than data. PPAI research shows that 60% of distributors expect higher sales in 2026, but only 53% expect higher profits. That gap is margins and visibility.

## How to Get Started

- Export your sales or order data as a CSV or Excel file from your CRM or order system.
- Upload the file to the LLM of your choice
- Copy-paste any prompt below. Replace bracketed items with your specifics.
- Ask follow-up questions. AI can drill deeper into anything it finds.

**PRO TIP:** Start with the Weekly Sales Summary report template. Run it next Monday morning. Once you see the value, add the Monthly Margin Snapshot and Quarterly Client Review. In 15 minutes a week, you'll have advanced data visibility.

## RECURRING REPORT TEMPLATES (SAVE THESE)

These three prompts are designed to be saved and reused. Export fresh data, run the same prompt, get an updated report. Build once, run forever.

### Weekly Sales Summary (Run Every Monday)

Here's my sales data for the past 7 days. Create a Weekly Sales Summary report formatted with clear sections and headers that I can share with my team. Include:1. HEADLINE METRICS: Total revenue this week, number of orders, average order value, and comparison to the previous week.2. TOP WINS: The 5 largest orders with client name, amount, and product category.3. PIPELINE SNAPSHOT: Open quotes sent this week, total value, and any aging past 7 days.4. REP PERFORMANCE: Revenue by sales rep with order count and average order size.5. WATCH LIST: First-time clients, clients ordering significantly more or less than usual, or categories trending differently.6. ACTION ITEMS: Based on this data, suggest 3 specific actions for the coming week.Format as a professional report I can copy directly into an email to my team.

### Monthly Margin Snapshot (Run on the 1st)

Here's my order data for the past month. Create a Monthly Margin Snapshot report with:1. OVERALL MARGIN: Average margin across all orders, compared to last month and 3-month trend.2. MARGIN BY CATEGORY: Average margin for each product category, ranked. Flag any categories where margins dropped more than 2% vs. last month.3. MARGIN BY CLIENT: Average margin for each client, ranked. Highlight the 5 lowest and 5 highest.4. RED FLAGS: Orders where margin fell below 25%. List with client, product, and margin %.5. PRICING OPPORTUNITIES: Where should I consider adjusting pricing? Which categories or clients are consistently below target?Format as a professional report for my leadership team.

### Quarterly Client Review (Run Start of Each Quarter)

Here's my client order data for the past quarter. Create a Quarterly Client Review report with:1. CLIENT TIER RANKING: Rank all clients by total revenue. Segment into A-tier (top 20%), B-tier (next 30%), C-tier (next 30%), D-tier (bottom 20%).2. GROWTH CLIENTS: Revenue increased 15%+ vs. prior quarter. What are they buying more of?3. DECLINING CLIENTS: Revenue dropped 15%+. Flag as at-risk.4. DORMANT ACCOUNTS: Ordered last quarter but not this quarter. List with last order date.5. REVENUE CONCENTRATION: What % of revenue comes from top 5 and top 10 clients?6. RECOMMENDED ACTIONS: 5 specific actions for next quarter - who to grow, re-engage, and diversify.Format as a strategic report for quarterly planning.

## SALES PERFORMANCE (QUESTIONS 1-7)

### 1. Client Revenue Ranking

Rank all my clients by total revenue for [TIME PERIOD]. Show the top 20 with: client name, total revenue, number of orders, average order size, and what percentage of my total revenue they represent.

### 2. Declining Accounts

Compare each client's revenue this [quarter/year] to the same period last [quarter/year]. Which clients are spending significantly less? Rank by revenue decline in dollars. Flag 20%+ declines as at-risk.

### 3. Growth Accounts

Which clients increased their spending the most? Show both dollar increase and percentage increase. Are there patterns in what they're buying more of?

### 4. Product Category Performance

Break down revenue by product category. Which are growing? Shrinking? What's the average margin by category? Where am I making the most total profit?

### 5. Seasonality Patterns

Analyze monthly revenue for the past 2-3 years. Are there seasonal patterns I should plan around? Which months are consistently strong or weak?

### 6. New vs. Repeat Revenue

What percentage of revenue comes from new clients vs. repeat? How has this mix changed? What's the average first-order size vs. average reorder size?

### 7. Rep Performance Comparison

Rank reps by total revenue, average order size, number of orders, and average margin. Who is most efficient? Who has the most room for improvement?

## FINANCIAL HEALTH (QUESTIONS 8-13)

### 8. Margin by Client

Calculate average margin for each client. Are my biggest revenue clients also my most profitable? Identify any where high revenue masks low margins.

### 9. Revenue Concentration Risk

What % of total revenue comes from my top 5 clients? Top 10? If I lost my single biggest client, what would the impact be?

### 10. Average Order Value Trends

How has my average order value changed over time? Is it trending up or down? Break down by product category and client segment.

### 11. Quote-to-Close Ratio

How many quotes do I send vs. how many close? What's my win rate by product category, client size, and deal size?

### 12. Payment Patterns

Which clients consistently pay late? What's my average days to payment? Flag anyone over 60 days.

### 13. Cost Trend Analysis

Are my costs from key suppliers increasing? Which categories have seen the biggest cost increases? Am I passing these through to clients?

## OPERATIONS & EFFICIENCY (QUESTIONS 14-19)

### 14. Order Processing Speed

Average time from order received to shipped? Break down by product category and order size. Where are the bottlenecks?

### 15. Supplier Reliability

Which suppliers deliver on time most consistently? Rank by on-time rate, average lead time, and issue frequency.

### 16. Reorder Frequency

How often do regular clients reorder? Average time between orders for top 20 accounts? Flag any overdue for their typical cycle.

### 17. Product Mix Analysis

What am I selling most by volume? By revenue? By profit? High-volume low-profit items to reconsider? Low-volume high-profit items to promote?

### 18. Error & Return Rate

What's my return rate? Which product categories and suppliers have the highest rates? Most common reasons? Total cost of returns?

### 19. Client Lifetime Value

For 2+ year clients, average total revenue per client? First year vs. subsequent years? How long until a new client becomes high-value?

## STRATEGIC PLANNING (QUESTIONS 20-25)

### 20. Growth Opportunity Map

Where are my biggest growth opportunities? Consider: underserved categories, clients with expansion potential, seasonal gaps, geographic areas.

### 21. Client Segmentation

Segment clients into A/B/C/D tiers based on revenue, frequency, and margin. How should I allocate time differently across segments?

### 22. 20% Growth Scenario

If I wanted to grow revenue 20% next year, where could it realistically come from? Existing expansion vs. new clients? Which accounts and categories?

### 23. At-Risk Revenue

Based on declining patterns and engagement: how much revenue is at risk of churning in the next 12 months? Which accounts need immediate attention?

### 24. Competitive Vulnerability

Where am I most vulnerable to a competitor? Clients with single-product relationships, declining engagement, or below-average frequency.

### 25. Wallet Share Opportunity

For my top clients, estimate my share of their total promo spend. Where am I only getting a fraction? Those are expansion opportunities.

### Imagine getting these reports without exporting *anything*.

Every prompt above requires you to manually export data, upload it, and run the report. What if these reports built themselves, automatically, from the real-time data inside the platform you use to run your business? No CSV exports. No copy-pasting. Just insights surfaced every week. That's the future AI-powered platforms like Syncore are building toward.

# AI Usage Policy Template

Establishing an AI usage policy within your business is critical to establish company-wide compliance with how teams can and should be leveraging AI.

This is a ready-to-customize AI usage policy template designed for promotional product distribution companies. Replace all **[BRACKETED ITEMS]** with your company's specific information. Yellow "Customize This" boxes throughout the document highlight sections you should tailor to your business.

<b>Company Name:</b>	[YOUR COMPANY NAME]
<b>Applies To:</b>	[ALL EMPLOYEES / SPECIFIC DEPARTMENTS]
<b>Policy Owner:</b>	[NAME, TITLE]
<b>Version:</b>	1.0
<b>Effective Date:</b>	[DATE]
<b>Last Reviewed:</b>	[DATE]
<b>Classification:</b>	[INTERNAL / CONFIDENTIAL]

## 1. Purpose and Scope

This policy establishes the rules and guidelines governing the use of Artificial Intelligence tools, services, and platforms at **[COMPANY NAME]**. The purpose of this policy is to enable our team to benefit from AI's productivity and efficiency advantages while protecting our clients' data, our business information, and our professional reputation.

This policy applies to all employees, contractors, and temporary staff at **[COMPANY NAME]** who use AI tools in the course of their work, whether on company devices, personal devices, or any other platform.

This policy covers all AI tools and services, including but not limited to: large language models (e.g., ChatGPT, Claude, Gemini, Copilot), AI-powered writing and content tools, image generation tools (e.g., Midjourney, DALL-E, Adobe Firefly), AI-powered search tools (e.g., Perplexity), and any other AI service used for business purposes.

**CUSTOMIZE THIS:** Adjust the scope based on your company size. Smaller companies may apply this to all employees. Larger companies may create department-specific versions.

## 2. Approved Tools

Only AI tools that have been reviewed and approved by **[POLICY OWNER / MANAGEMENT]** may be used for company business. The current list of approved tools is:

Tool	Subscription	Approved Uses
[Tool Name, e.g. ChatGPT]	[Plan/Tier]	[Approved Uses]
[Tool Name, e.g. Claude]	[Plan/Tier]	[Approved Uses]
[Tool Name, e.g. Midjourney]	[Plan/Tier]	[Approved Uses]
[Add more as needed]	[Plan/Tier]	[Approved Uses]

Requesting new tools: Any team member who wants to use an AI tool not on this list must request approval from [\[POLICY OWNER\]](#) before using it for any work purpose. This applies even to free tools.

Personal AI accounts: Personal AI subscriptions must not be used for company work. Company data, client information, order details, and internal processes must never be entered into a personal AI account.

### 3. Data Protection and Client Confidentiality

Protecting our clients' information and our business data is the most critical aspect of AI usage. The following rules apply to all AI tool usage, including approved tools.

#### 3.1 Data That Must Never Be Entered Into AI Tools

Unless your approved tool has been specifically cleared for that data category, the following must never be submitted to any AI tool:

- Client personally identifiable information (names, addresses, emails, phone numbers)
- Client payment information, credit card numbers, or financial account details
- Client order data that could identify specific clients or their purchasing patterns
- Company financial records, bank account information, or payroll data
- Passwords, login credentials, API keys, or security configurations
- Employee personal information, performance reviews, or HR records
- Contracts, legal agreements, or confidential business term

#### 3.2 Data That May Be Used With Approved Tools

The following may be shared with approved, company-sanctioned AI tools for legitimate business purposes:

- General product information, catalog data, and publicly available supplier details
- Draft content (emails, proposals, social posts) that does not contain client PII
- Internal process descriptions for SOP creation (with client names removed)
- General business questions, brainstorming, and content ideation
- Publicly available industry data and research

**CUSTOMIZE THIS:** Review this section carefully based on your specific client contracts and any confidentiality agreements you have in place. If you handle government or healthcare clients, additional restrictions may apply.

### 4. Human Review and Accountability

AI is a tool that assists your work. It does not replace your judgment, expertise, or responsibility. The following rules apply to all AI-generated content:

#### 4.1 Everything Gets Reviewed

- All AI-generated content must be reviewed by the person who requested it before it is used, sent, or shared.
- AI-generated emails, proposals, and client communications must be reviewed for accuracy, tone, and appropriateness before sending.
- AI-generated pricing analysis must be verified against source data before being used to make pricing decisions.
- AI-generated SOPs and documentation must be reviewed by someone with process knowledge before distribution.

#### 4.2 You Own What You Send

If you send it, you own it. The fact that AI generated content does not reduce your responsibility for its accuracy, professionalism, or appropriateness. "The AI wrote it" is never an acceptable explanation for inaccurate, unprofessional, or inappropriate content sent to a client, partner, or colleague.

#### 4.3 When to Disclose AI Usage

Decide as a company when and whether to disclose AI usage to clients. Consider the following guidance:

- AI-generated product mockups should be identified as concept images, not production proofs
- If a client directly asks whether AI was used, always answer honestly
- AI-assisted research and analysis should be verified before presenting as factual

**CUSTOMIZE THIS:** Some companies choose full transparency about AI usage. Others treat it like any other business tool. Decide your position and document it here.

## 5. Acceptable Use Guidelines by Role

Different roles in a promotional products distributorship interact with AI differently. Here are guidelines organized by function:

### 5.1 Sales Team

- Encouraged: Drafting proposal cover letters, follow-up emails, product brainstorming, meeting prep research, mockup generation
- Requires caution: Pricing analysis (always verify against source data), client research (confirm facts before citing)
- Prohibited: Entering client PII, sending AI-generated content without reviewing it, making pricing commitments based solely on AI analysis

### 5.2 Customer Service / CSR Team

- Encouraged: Drafting client communications, order status summaries, product recommendation research, process documentation
- Requires caution: Responding to client complaints (tone must be reviewed carefully), order-related information (verify accuracy)
- Prohibited: Entering client payment or account information, sending automated responses without review, relying on AI for order status without verifying in your system

### 5.3 Operations and Finance

- Encouraged: Process documentation and SOP creation, data analysis and reporting, vendor communication drafting
- Requires caution: Financial analysis (always verify calculations), supplier pricing (cross-reference with source documents)
- Prohibited: Entering financial credentials or bank information, making financial decisions based solely on AI output, submitting tax or compliance documents generated by AI without professional review

### 5.4 Ownership and Leadership

- Encouraged: Strategic analysis, business planning scenarios, data-driven reporting, content creation, industry research
- Requires caution: Ensure strategic decisions are informed by AI analysis but made by human judgment. Verify all data and projections.
- Prohibited: Sharing confidential financial details, M&A information, or legal matters with AI tools not specifically approved for those purposes

**CUSTOMIZE THIS:** Add or remove roles based on your team structure. If you have specialized roles (e.g., designers, warehouse staff), add sections for them.

## 6. Brand and Quality Standards

AI-generated content representing your company must meet the same quality and brand standards as any other business communication:

- AI-generated content must match your company's voice, tone, and professional standards
- AI-generated product mockups shared with clients should include a note that they are concept images for illustration purposes
- Marketing content generated with AI must be reviewed for accuracy and brand alignment before publishing
- Never present AI-generated data, statistics, or research as original research without verification from a credible source
- Proofread all AI-generated content. AI makes mistakes, produces awkward phrasing, and can hallucinate facts

## 7. Compliance and Consequences

Compliance with this policy is mandatory for all team members. Violations may result in disciplinary action.

### 7.1 Reporting Concerns

If you become aware of a potential violation of this policy, or if you are unsure whether a particular use of AI is permitted, contact [\[POLICY OWNER / MANAGER\]](#) immediately. Questions asked in good faith will never result in disciplinary action.

### 7.2 Consequences of Violations

Violations of this policy will be addressed based on severity:

- Minor violations (e.g., using an unapproved tool for non-sensitive work, failing to review AI output before internal use): verbal warning and coaching
- Moderate violations (e.g., entering non-PII client information into unapproved tools, sending unreviewed AI content to clients): written warning and mandatory retraining
- Serious violations (e.g., entering client PII into unauthorized tools, repeated policy violations, deliberate circumvention): disciplinary action up to and including termination

**CUSTOMIZE THIS:** Adjust the consequence framework to match your company's existing disciplinary process and HR policies. Consult with your HR advisor or legal counsel as needed.

## 8. Policy Review and Updates

AI technology evolves rapidly. This policy will be reviewed and updated on the following schedule:

- Full policy review: [QUARTERLY / SEMI-ANNUALLY / ANNUALLY]
- Approved tool list review: [MONTHLY / QUARTERLY]
- Ad-hoc updates: as needed when new tools, risks, or use cases emerge

All updates will be communicated to the team and require renewed acknowledgement if material changes are made.

## 9. Employee Acknowledgement

All team members must read, understand, and sign this policy before using AI tools for company business.

<b>Employee Name:</b>	
<b>Title / Role:</b>	
<b>Department:</b>	
<b>Date:</b>	
<b>Signature:</b>	

By signing above, I confirm that I have read, understood, and agree to comply with [\[COMPANY NAME\]](#)'s Artificial Intelligence Usage Policy in its entirety. I understand that any violation of this policy may result in disciplinary action.

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