A hand pointing at a computer with a robot coming out of it

AI-generated content may be incorrect.

**AI Guidebook**

**for PreSales**

Contents

[1. Executive Summary 5](#_Toc207206256)

[2. Introduction 5](#_Toc207206257)

[3. Overview of Tools 6](#_Toc207206258)

[3.1. Perplexity 6](#_Toc207206259)

[3.2. ChatGPT/Copilot 6](#_Toc207206260)

[3.3. Claude 7](#_Toc207206261)

[3.4. Comparison Table 8](#_Toc207206262)

[4. Promting Techniques 8](#_Toc207206263)

[4.1. Why Prompting Techniques Matter in PreSales 8](#_Toc207206264)

[4.2. Foundational Techniques (11) 9](#_Toc207206265)

[4.2.1. Role-Based Prompting 10](#_Toc207206266)

[4.2.2. Context Enrichment 11](#_Toc207206267)

[4.2.3. Clarity & Specificity 11](#_Toc207206268)

[4.2.4. Format & Tone Guidance 12](#_Toc207206269)

[4.2.5. Example-Driven (Few-Shot) Prompting 13](#_Toc207206270)

[4.2.6. Ask for Multiple Options 13](#_Toc207206271)

[4.2.7. Framework‑Driven Prompts (SPICED, MEDDICC, FAB) 14](#_Toc207206272)

[4.2.8. Scenario Simulation / Role‑Play 14](#_Toc207206273)

[4.2.9. Step‑by‑Step / Process Decomposition 15](#_Toc207206274)

[4.2.10. Iterative Refinement (Critique‑then‑Create) 15](#_Toc207206275)

[4.2.11. Role Chaining (Sequential Personas) 16](#_Toc207206276)

[4.3. Reasoning & Exploration (12) 17](#_Toc207206277)

[4.3.1. Chain-of-Thought (CoT) - High-level reasoning 18](#_Toc207206278)

[4.3.2. Tree-of-Thoughts (ToT) 18](#_Toc207206279)

[4.3.3. Self-Consistency 19](#_Toc207206280)

[4.3.4. Step-Back Prompting 19](#_Toc207206281)

[4.3.5. Least-to-Most 20](#_Toc207206282)

[4.3.6. Self-Ask 20](#_Toc207206283)

[4.3.7. Program-of-Thought (PoT) 21](#_Toc207206284)

[4.3.8. Graph-of-Thought (GoT) 22](#_Toc207206285)

[4.3.9. Skeleton-of-Thought (SoT) 22](#_Toc207206286)

[4.3.10. Plan-and-Solve 23](#_Toc207206287)

[4.3.11. Multi-Agent Debate / Self-Debate 24](#_Toc207206288)

[4.3.12. Contrastive Prompting 24](#_Toc207206289)

[4.4. Verification & Safety (7) 25](#_Toc207206290)

[4.4.1. Chain-of-Verification (CoVe) 25](#_Toc207206291)

[4.4.2. Retrieval-Augmented Generation (RAG) 26](#_Toc207206292)

[4.4.3. Self-RAG 27](#_Toc207206293)

[4.4.4. ReAct (Reason + Act) 27](#_Toc207206294)

[4.4.5. Reflexion 28](#_Toc207206295)

[4.4.6. Active‑Prompt 28](#_Toc207206296)

[4.4.7. OPRO (Automatic Prompt Optimisation) 29](#_Toc207206297)

[4.5. Workflow & Automation (4) 30](#_Toc207206298)

[4.5.1. Directional Stimulus Prompting (DSP) 30](#_Toc207206299)

[4.5.2. ReWOO (Reasoning Without Observation) 31](#_Toc207206300)

[4.5.3. RISEN Framework 31](#_Toc207206301)

[4.5.4. Prompt Chaining (Multi-Step Linked Prompts) 32](#_Toc207206302)

[4.6. Multi-Perspective & Creativity (3) 32](#_Toc207206303)

[4.6.1. De Bono Six Thinking Hats - Perspective Shifter 33](#_Toc207206304)

[4.6.2. Pain‑Dream‑Fix (Storytelling) 34](#_Toc207206305)

[4.6.3. Analogical Prompting 34](#_Toc207206306)

[4.7. Meta‑Techniques (4) 35](#_Toc207206307)

[4.7.1. Meta-Prompting (Prompt the Prompt) 35](#_Toc207206308)

[4.7.2. Prompt Debugging 36](#_Toc207206309)

[4.7.3. Mixed-Initiative Prompting 37](#_Toc207206310)

[4.7.4. Human-in-the-Loop (HITL) 37](#_Toc207206311)

[4.8. Hallucination of Models and how to avoid them 38](#_Toc207206312)

[5. Tool Selection Guide by Task Type 39](#_Toc207206313)

[5.1. PreSales & Prompting Agent 39](#_Toc207206314)

[5.1.1. PreSales Handbook GPT 39](#_Toc207206315)

[5.2. Prompt Master 40](#_Toc207206316)

[5.3. Discovery Sessions 41](#_Toc207206317)

[5.3.1. Overview 41](#_Toc207206318)

[5.3.2. Example Prompt Workflow 41](#_Toc207206319)

[5.3.3. Extensive Prompt for Pre-Discovery Research 42](#_Toc207206320)

[5.3.4. 2nd Prompt 43](#_Toc207206321)

[5.4. Demo Workshops 45](#_Toc207206322)

[5.4.1. Overview 45](#_Toc207206323)

[5.4.2. Example Prompt Workflow for AI-Enhanced Demo Preparation 46](#_Toc207206324)

[5.4.3. Key Takeaway: Demo = Tailored Story + Verified Impact + Persona Empathy 47](#_Toc207206325)

[5.5. Solution Design 47](#_Toc207206326)

[5.5.1. Overview 47](#_Toc207206327)

[5.5.2. Example Prompt Workflow 48](#_Toc207206328)

[5.6. Business Analysis 49](#_Toc207206329)

[5.6.1. Overview 49](#_Toc207206330)

[5.6.2. Example Prompt Workflow 49](#_Toc207206331)

[6. Prompting Best Practices 50](#_Toc207206332)

[6.1.1. General Prompting Tips 50](#_Toc207206333)

[6.1.2. Tool-Specific Prompting Techniques 51](#_Toc207206334)

[7. Prompt Templates for PreSales 53](#_Toc207206335)

[7.1. Analysis / Summary Template 53](#_Toc207206336)

[7.2. Brainstorm / Ideation Template 53](#_Toc207206337)

[7.3. Process Improvement Template 53](#_Toc207206338)

[7.4. Comparative Evaluation Template 54](#_Toc207206339)

[7.5. Email / Communication Template 54](#_Toc207206340)

[7.6. ROI / Business Case Template 54](#_Toc207206341)

[8. Promoting AI Internally 54](#_Toc207206342)

# Executive Summary

Presales teams in Supply Chain and Global Trade operate at the crossroads of complex operations, strict regulations, and diverse stakeholder expectations. You interact with buyers from many roles such as COO, CFO, Head of Logistics, Trade Compliance Officer, IT Security, and Procurement. At the same time, you need to defend your solution design under scrutiny and show value through measurable metrics: cost to serve, landed cost, duty savings, on-time in-full delivery, lead-time variance, demurrage, and emissions reduction.

Prompting means giving clear and structured instructions to AI tools like ChatGPT. It can dramatically improve the speed, quality, and consistency of your presales work. It helps with sharper discovery questions, stronger demo flows, faster RFP responses, more credible ROI models, and better objection handling.

This guide distills both foundational and advanced prompting techniques into practical templates tailored for Supply Chain and Global Trade. The goal is to make AI your dependable "second brain" while avoiding the trap of generic outputs.

You’ll find:

* An overview of the tools available and what they are best suited for
* How to use AI tools effectively in presales
* A short primer on why prompting matters in presales
* 41 techniques, grouped into Foundational, Reasoning and Exploration, Verification and Safety, Workflow and Automation, and Multi-Perspective and Creativity
* For each technique: what it is, why it helps, when to use it, common pitfalls, a reusable template, and domain-specific examples
* End-to-end playbooks for discovery, demo design, ROI analysis, architecture and security reviews, RFP strategy, and objection handling

If you're looking for a quick option and prefer not to read this lengthy document, please use the ready-made Prompt Master, which contains all the best prompting techniques.

[ChatGPT Prompt Master](https://chatgpt.com/g/g-67c4a0acccb48191adbba664a1b24c8a-prompt-master) (<https://chatgpt.com/g/g-67c4a0acccb48191adbba664a1b24c8a-prompt-master>)

# Introduction

Generative AI is rapidly becoming a trusted assistant in Solution Consulting, especially in global trade and supply chain. When applied effectively, tools such as ChatGPT/Copilot, Claude, and Perplexity can raise productivity by up to 40%. For Solution Consultants, this means faster preparation, deeper insights, and more time for strategic thinking and client engagement.

This guide shows you how to turn AI from a generic helper into a reliable co-consultant. The key is prompt design. Quality outputs do not happen automatically; they depend on how you frame your requests. Weak prompts often lead to vague or misleading answers, and AI systems sometimes **hallucinate** by generating information that sounds convincing but is factually wrong. Strong prompts, combined with verification techniques, reduce this risk and produce precise, credible results tailored to your client’s world.

Inside this playbook, you will find:

* **Overview of AI tools** with strengths, weaknesses, and best-fit use cases for presales work
* **41 techniques** grouped into five categories: Foundational, Reasoning and Exploration, Verification and Safety, Workflow and Automation, and Multi-Perspective and Creativity
* **Step-by-step prompt workflows** for core presales activities such as discovery, demo design, ROI analysis, architecture and security reviews, RFP strategy, and objection handling
* **Best practices and reusable templates** that explain what each technique is, why it matters, when to use it, and how to avoid pitfalls
* **Guidance on promoting AI adoption** across teams and clients, helping you teach and scale effective usage

By mastering these methods, you can consistently create outputs that are accurate, persuasive, and ready for client conversations. More than a set of tips, this guide is a structured playbook to help Solution Consultants harness AI as a dependable second brain for daily work.

# Overview of Tools

Solution Consultants can choose from several AI assistants to support their daily work. Each tool has unique strengths and limitations, making it important to understand where each one fits best.

This section provides an overview of three leading options: **Perplexity, ChatGPT/Copilot, and Claude**. For each, we outline what it excels at, where it falls short, and the most effective use cases in presales.

A quick comparison table at the end highlights their key differences and helps you select the right tool for the task at hand.

## ****Perplexity****

Perplexity is best described as an **AI-powered search engine** that delivers conversational answers with cited sources. It excels at **real-time research and information retrieval**, pulling up-to-date data directly from the web. This makes it highly effective for **fact-finding, industry research, and checking the latest regulations**.

Perplexity has **live internet access**, which makes it particularly useful for **time-sensitive or highly factual questions**. Its free tier allows unlimited searches, making it a reliable everyday research assistant.

Strengths

* Real-time web search with cited sources
* Strong at aggregation and summarisation from multiple references
* Unlimited searches available in the free tier

Weaknesses

* Limited to concise factual answers; weaker for long-form creative tasks
* Less effective at deep contextual reasoning beyond available online sources
* Basic chat interface; does not produce long narratives or code

Best Use Cases

* Market and industry research
* Checking regulatory updates (e.g., customs, compliance, tariffs)
* Fact-checking data before using it in presales deliverables

## ****ChatGPT/Copilot****

OpenAI’s ChatGPT (often integrated as Copilot) is a **versatile large language model** known for its conversational style and wide-ranging knowledge. It is highly adaptable, able to **brainstorm, draft content, explain concepts, write code, and adjust tone or style** when instructed. This makes it a strong general-purpose tool for presales tasks such as **drafting emails and documents, creating demo storylines, or prototyping answers to client questions**.

It also supports many languages and benefits from a large community, with numerous plugins, integrations, and prompt examples available.

Strengths

* Highly versatile across many task types (writing, brainstorming, coding, explanations)
* Conversational and adaptive tone, producing fluent and natural responses
* Wide community support with plugins, integrations, and shared prompt libraries
* Strong for creative storytelling and interactive dialogues

Weaknesses

* It can still produce confident but wrong answers. You should verify important details and check linked sources. Can **hallucinate** by producing convincing but factually incorrect answers, requiring verification
* The feature set evolves. Custom GPTs and connectors replaced the older plugin approach, so older how-tos may be out of date.
* Shorter memory (context window) than Claude; long inputs may need to be broken into smaller parts

Best Use Cases

* Drafting client-facing emails, RFP responses, or solution documents
* Brainstorming demo narratives and objection handling strategies
* Explaining technical or compliance concepts in plain language
* Iterative dialogues where creativity and adaptability matter

## ****Claude****

Anthropic’s Claude is an **AI chatbot** designed with a focus on large context handling and safety. Its standout feature is a **very large context window** (up to 100K tokens in Claude 2, compared to ~8K–32K for ChatGPT/Copilot). This allows Claude to process **long documents or extended conversations** while keeping track of details.

Claude is known for producing **concise, well-structured responses**, often organised into bullet points or steps. It performs especially well in **complex problem-solving and content generation where large amounts of context are required**. For example, it can analyse long supply chain process documents or summarise large datasets and contracts. Claude also takes a **safety-first approach** to reduce problematic outputs and is cost-effective when accessed via API.

Strengths

* Extremely large context window (handles very long inputs and conversations)
* Produces structured, clear, and well-organised responses
* Strong at summarising lengthy materials and solving complex problems
* Safety-first design with reduced risk of harmful outputs
* Cost-effective when used via API

Weaknesses

* Can be conservative, occasionally refusing queries it sees as sensitive
* Less “chatty” or creative compared to ChatGPT/Copilot
* Public versions may have usage limits (e.g., daily caps on free access)

Best Use Cases

* Analysing lengthy supply chain or compliance documents
* Summarising RFPs, contracts, or large datasets
* Supporting complex solution design workshops where lots of context is needed
* Producing structured outlines, step-by-step plans, or multi-part reasoning

## Comparison Table

**Table 1, Quick Reference: Perplexity vs. ChatGPT/Copilot vs. Claude**

|  |  |  |  |
| --- | --- | --- | --- |
| Tool | Strengths | Limitations | Best Use Cases for SC |
| **Perplexity**  (AI Search Engine) | • Real-time web search with up-to-date info • Returns cited sources for fact-checking  • Unlimited queries (free tier) for research | • Focused on factual Q&A; not for lengthy creative output  • No deep memory, each query stands alone (short context) | Market/industry research, retrieving latest trade news or regulations, fact-checking data (e.g. HS codes, duties) |
| **ChatGPT/Copilot**  (OpenAI GPT model) | • Highly versatile; strong natural language generation  • Conversational and creative, can explain, brainstorm, write code, etc.  • Large user community, plugins, multi-language support | • Knowledge cutoff (not inherently up-to-date on current events)  • Moderate context length (e.g. ~8K tokens for GPT-4 by default)  • May produce plausible but incorrect answers (hallucinations | General-purpose tasks: drafting emails, solution write-ups, brainstorming demo scripts, coding small utilities, and interactive Q&A with moderate context. Great for **creative storytelling** and iterative dialogues |
| **Claude**  (Anthropic model) | • Very large context window (tens of thousands of tokens), can handle long inputs  • Structured, detailed responses (often bullet-pointed  • Good at nuanced, complex problem-solving (e.g. analysing long workflows) | • No real-time knowledge (trained on fixed data)  • Tends to be cautious and may refuse some requests  • Less accessible (fewer plugins/UI options); free usage may be limited per day | In-depth analysis of lengthy materials: e.g. summarising a 50-page RFP, reviewing detailed process docs, multi-step reasoning. Also useful for **brainstorming with lots of context** and generating structured plans or outlines. |

Tips: All three tools can often be used together. For instance, you might use Perplexity to gather facts and source links on a new trade regulation and then feed that information into ChatGPT/Copilot or Claude to draft a client-friendly explanation. It’s important to understand each tool’s sweet spot, this way, you can pick the best “AI helper” for the task at hand.

# Promting Techniques

## Why Prompting Techniques Matter in PreSales

In presales, you rarely get a second chance to impress. Whether it is discovery, demo preparation, or handling objections, the quality of your preparation determines how credible and relevant you appear to the client. AI can give you speed and scale, but only if you know how to prompt it effectively.

This chapter shows you how to speak to AI in a way that delivers useful, client-ready results.

* **Foundational techniques** such as role-based prompting, context enrichment, and clarity ensure outputs are tailored to your buyer’s world rather than generic.
* **Reasoning and safety techniques** help you avoid errors and provide answers you can trust in front of a CFO or Compliance Officer.
* **Workflow and creativity techniques** turn AI into a sparring partner that can stress test your approach, simulate tough questions, and generate multiple options on the spot.

The bottom line: **prompting techniques are not a theory**. They are practical shortcuts that turn AI into a reliable co-consultant.

Mastering them means you achieve:

* Faster preparation with no blank pages before a client meeting
* Stronger discovery with persona-specific questions
* More persuasive demos with stories framed around pain, dream, and fix
* Fewer mistakes with verified outputs you can trust

Skip them, and you will get the same generic answers as everyone else. Apply them, and you will walk into client meetings with sharper insights, stronger stories, and more confidence.

## Foundational Techniques (11)

| # | Technique | What it Does | Why it Matters | Best Use Cases |
| --- | --- | --- | --- | --- |
| 4.2.1 | Role Based Prompting | Instruct AI to act as a specific expert persona. | Aligns answers to CFO, Compliance, Logistics, etc. Builds trust and relevance. | Discovery, objection handling, exec briefings. |
| 4.2.2 | Context Enrichment | Provide industry, volumes, systems, constraints upfront. | Steers AI toward realistic outputs (e.g., ICS2, Incoterms, ERP context). | Whenever outputs feel “too generic.” |
| 4.2.3 | Clarity & Specificity | Define scope, length, structure, and audience. | Prevents fluffy outputs, ensures exec-ready material. | Client deliverables (briefs, RFPs, summaries). |
| 4.2.4 | Format & Tone Guidance | Specify output type (list, email, table) and tone. | Makes outputs paste-ready for slides, CRM, or RFPs. | Customer emails, slide content, formal docs. |
| 4.2.5 | Example Driven (Few-Shot) | Provide strong samples for AI to mimic. | Scales your “house style” across team deliverables. | ROI messaging, discovery guides, sales decks. |
| 4.2.6 | Ask for Multiple Options | Request several variants in one go. | Faster brainstorming; covers multiple buyer priorities. | Early-stage prep: demos, invites, objections. |
| 4.2.7 | Framework Driven (SPICED, MEDDICC, FAB) | Force structure via sales frameworks. | Ensures complete coverage, easier coaching. | Discovery planning, qualification, RFPs. |
| 4.2.8 | Scenario Simulation / Role Play | Emulate meetings, objections, Q&A. | Lets you rehearse and close gaps before live. | Pre-demo, exec briefing, negotiations. |
| 4.2.9 | Step by Step / Process Decomposition | Break work into ordered stages with objectives, actions, evidence. | Prevents skipped steps in demos, POCs, onboarding. | Pilots, onboarding, long demos. |
| 4.2.10 | Iterative Refinement | Draft → critique → improve. | Raises quality without starting over. | Objection handling, proposals, exec briefs. |
| 4.2.11 | Role Chaining (Sequential Personas) | Sequentially answer as multiple roles. | Builds 360° stakeholder view. | Objection handling, business cases, multi-role demos. |

### Role-Based Prompting

**What:** Instruct the AI to act as a specific expert (e.g., Trade Compliance Officer, Logistics Director).

**Why:** Different stakeholders value different outcomes (CFO focuses on cash and risk, Compliance looks at penalties and audits, Logistics cares about lead times and warehouse costs). Role-based prompts mirror these voices, so your outputs are aligned with each persona.

**When:** Discovery, objection handling, executive briefings.

**Pitfalls:** If roles are too generic, the AI produces clichés like “cut costs” or “increase efficiency.” Add context such as company size, region, and KPIs to make answers realistic.

**So What:** Role-based prompting helps you instantly tailor your prep to the exact persona in front of you. This makes your questions and answers sound credible instead of generic, which builds trust faster in client meetings.

**Pro Tip:** Include KPIs or pain points typical for the role. For example, a CFO cares about working capital and ROI, a Trade Compliance Officer about penalties and audits, and a Logistics Director about shipment visibility and delivery reliability.

**Template**:

Act as a [ROLE] at a [COMPANY SIZE] [INDUSTRY] operating in [REGIONS].

Goal: [OUTCOME].

Constraints: [POLICIES/TECH].

Output: [FORMAT, e.g., 6 bullets in plain English].

**Examples**:

**Discovery (CFO):**“Act as a CFO for a 2B€ retailer in EU/US. Draft 7 discovery questions to quantify working capital and duty exposure from slow customs cycles. Output: bullets, no jargon.”

**Security (CISO):**“Act as a CISO at a multinational. List the top 10 questions you’d ask a SaaS vendor about data residency and audit logging for customs declarations.”

**Supply Chain (Head of Logistics):**“Act as a Head of Logistics at a consumer goods company operating across Asia. List five concerns you would raise about shipment visibility and delivery reliability.”

### Context Enrichment

**What:** Front-load the AI with industry details, transaction volumes, systems, and constraints before asking for an output.

**Why:** Context steers the model toward relevant patterns. For example, if you mention ICS2 filings, Incoterms, or ERP systems, the AI will tailor its responses to those specifics rather than giving a generic response.

**When:** Use this whenever outputs feel too generic or disconnected from your customer’s reality.

**Pitfalls:** Dumping too much unstructured text confuses the AI and leads to unfocused answers. Break context into clear sections using headings, bullet points, or tables.

**So What:** Context enrichment transforms the AI from a “general assistant” into a domain-aware partner. By feeding the right background, you get answers that sound like they came from inside your customer’s business, not from a textbook.

**Pro Tip:** Keep context short, structured, and relevant. Mention only what directly shapes the answer (industry, scale, systems, compliance rules). If possible, include both a constraint and a KPI, for example: “strict EU data residency” or “target 98% on-time delivery.”

**Template**:

Context: [Context]

Industry: [INDUSTRY], Regions: [REGIONS], Volumes: [VOLUMES]

Current systems: [ERP/TMS/WMS]

Constraints: [DATA RESIDENCY, COMPLIANCE]

Task: [TASK]

Output: [FORMAT]

**Examples**:

* “Context: Apparel importer (EU/US), 3k SKUs, SAP S/4HANA, strict EU data residency. Task: draft demo scenes for HS classification and denied party screening. Output: 5 scenes with proof moments.”
* “Context: Automotive supplier shipping across NAFTA, 10k shipments per month, Oracle ERP, focus on minimizing border delays. Task: design discovery questions for customs automation. Output: 6 targeted questions.”

### Clarity & Specificity

**What:** Make your prompt unambiguous by defining scope, length, structure, and target audience.

**Why:** Clear prompts avoid fluffy, unfocused outputs. This is especially important when creating material for executives who want crisp, structured, and to-the-point information.

**When:** Use this whenever you need client-facing deliverables such as executive briefs, email drafts, or meeting summaries.

**Pitfalls:** Vague prompts like “summarize this report” lead to generic text. Always specify what to include and exclude; otherwise, the AI may add irrelevant content.

**So What:** Clarity and specificity ensure that AI outputs are not only correct but also usable. The results can often be pasted directly into a slide, email, or RFP without heavy editing, saving you valuable time.

**Pro Tip:** Always define at least three things in your prompt: the audience (CFO, Compliance, Logistics), the format (bullets, table, paragraph), and the boundaries (what to include and what to exclude). This keeps the AI focused on what matters most for your use case.

**Template**:

Write [N] [TYPE] focused on [TOPIC] for a [AUDIENCE].

Limit to [WORDS].

Include [A,B,C].

Exclude [X,Y].

**Examples**:

* “Write a 120-word executive brief on landed cost drivers for EU imports. Include duties, VAT, and freight surcharges. Exclude any marketing language.”
* “Write 5 bullet points for a CIO on system security in global trade platforms. Include data residency, audit logging, and encryption. Exclude technical jargon.”

### Format & Tone Guidance

**What:** Tell the AI exactly how the output should look (list, email, table, JSON) and in which tone it should be written (executive ready, technical, neutral, advisory).

**Why:** Clear format and tone instructions give you outputs that are immediately usable in slides, CRM notes, RFP responses, or client emails. This saves time and reduces rework.

**When:** Use whenever the output needs to be pasted into a deliverable or presented directly to a customer.

**Pitfalls:** Without guidance, AI often defaults to long text or a casual tone. This may not be suitable for executives or formal documents. Always specify both format and tone.

**So What:** By shaping format and tone upfront, you transform AI outputs from “rough drafts” into polished assets. This makes your work look professional and aligned with your audience without extra editing.

**Pro Tip:** Match the tone to the persona. A CFO wants concise, numbers-driven summaries. A compliance officer prefers precise, risk-focused language. A logistics manager might value practical step-by-step lists.

**Template**:

Output format: [EMAIL/LIST/TABLE/JSON]

Tone: [EXEC-READY/TECHNICAL/NEUTRAL/ADVISORY]

**Examples**:

* “Output format: table with columns {Risk, Likelihood, Impact, Mitigation}. Tone: executive ready. Populate for late port clearance.”
* “Output format: professional email. Tone: neutral and advisory. Draft a note to a client explaining upcoming changes in EU customs regulations.”

### Example-Driven (Few-Shot) Prompting

**What:** Provide the AI with high-quality examples you want it to mimic. The model will copy the tone, structure, and style of your sample when generating new content.

**Why:** This is the fastest way to enforce your team’s “house style.” Whether it is the phrasing of discovery questions, ROI statements, or executive briefs, strong examples steer the AI toward outputs that sound like your organization.

**When:** Use when you want consistent wording across sales decks, emails, or discovery guides. Especially valuable for ROI messaging and compliance proof points.

**Pitfalls:** Bad inputs lead to bad outputs. If you provide weak or unclear examples, the AI will replicate those flaws. Always use your strongest material as the model.

**So What:** Example driven prompting helps you scale your best content. Instead of reinventing the wheel, you can take one strong discovery question or value statement and instantly generate five more in the same voice. This ensures consistency across your presales team and avoids generic or off-brand phrasing.

**Pro Tip:** Store a library of your “gold standard” prompts (best value props, strongest discovery questions, proven ROI lines). When needed, feed one into the AI and ask for variants. This creates alignment across all consultants and reduces editing time. With ChatGPT, you can also build your own models and reuse them.

**Template**:

Here is a model example: [PASTE]

Generate [N] new items in the same structure and tone, for [TOPIC]

**Examples**:

* “Here is our value prop style: ‘Reduce customs rework by 30% by centralizing declarations.’ Generate 3 for sanctions screening.”
* “Here is a sample discovery question style: ‘How often do customs delays affect your lead times, and what financial impact does this create?’ Generate 5 similar questions for trade compliance automation.”

### Ask for Multiple Options

**What:** Instruct the AI to generate several alternatives for the same task in one go.

**Why:** This speeds up brainstorming and gives you a variety of options to choose from. Instead of rewriting prompts repeatedly, you can “pick and mix” the best elements across different outputs.

**When:** Use this during early-stage preparation, such as demo design, email invites, objection handling, or value messaging. It is especially helpful when you need creative variety but don’t have time for multiple iterations.

**Pitfalls:** Too many options can become overwhelming. Keep the number realistic (3–7 variants). Always define how each option should differ (for example, “each with a different primary benefit”).

**So What:** Asking for multiple options helps you avoid tunnel vision. You instantly see different ways to frame the same message, which makes it easier to tailor communication to different stakeholders or test what resonates most.

**Pro Tip:** Tie each option to a different buyer priority. For example, one option can highlight cost savings, another compliance risk reduction, and another operational efficiency. This ensures your outputs cover the spectrum of stakeholder interests.

Template:

“Give me [N] variants of [ITEM], each emphasizing a different [BENEFIT or ANGLE].”

Examples:

* “Give me five email subject lines for a demo invite: (a) duty relief, (b) faster clearance, (c) audit readiness, (d) SSO/security, (e) carbon reporting.”
* “Generate three different discovery questions for a Head of Logistics, each focusing on a unique angle: shipment delays, warehouse utilization, and transport costs.”

### Framework‑Driven Prompts (SPICED, MEDDICC, FAB)

**What:** Use established sales frameworks such as SPICED, MEDDICC, or FAB to force structure in AI outputs.

**Why:** Frameworks ensure complete coverage of a sales situation. They make coaching easier, keep conversations disciplined, and help you align AI-generated content with proven presales methods instead of ad-hoc lists.

**When:** Use this for discovery planning, qualification, RFP responses, or whenever you need to make sure all key angles are covered.

**Pitfalls:** If you do not explain the framework briefly, the AI may misinterpret it or skip parts. Always specify the exact framework and the expected output.

**So What:** Framework driven prompts help you avoid blind spots. Instead of random questions or unstructured content, you get systematic outputs that follow sales best practices. This makes your deliverables easier to coach, compare, and reuse across the team.

**Pro Tip:** Combine frameworks with personas. For example, “Using MEDDICC, create a checklist for a CFO evaluating a customs automation project.” This blends sales discipline with buyer relevance.

**Template**:

“Using [FRAMEWORK], generate [OUTPUT].”

**Examples**:

* “Using SPICED, create 2 questions per stage for a Trade Compliance Officer evaluating denied party screening.”
* “Create a MEDDICC checklist for an EU importer considering an ICS2 module.”
* “Using FAB, write three value statements for a Head of Logistics evaluating a visibility solution.”

### Scenario Simulation / Role‑Play

**What:** Ask the AI to act out a meeting, Q&A, or sceptical stakeholder interaction.

**Why:** This allows you to rehearse in a safe environment. By simulating objections, challenging questions, or high-pressure meetings, you can prepare stronger responses and identify gaps before facing the client.

**When:** Use before critical demos, executive briefings, or negotiations where objections are likely.

**Pitfalls:** If the role is too vague, the AI will ask generic questions. Always define the persona clearly, including role, priorities, and pain points, to make the simulation realistic.

**So What:** Scenario simulations help you enter client conversations more confidently and prepared. Instead of being surprised by objections, you already have well-practised, relevant answers that build credibility.

**Pro Tip:** After the role play, ask the AI to critique your answers and suggest improvements. This turns the exercise into both a rehearsal and a coaching session.

**Template**:

“Role play as [SKEPTICAL ROLE]. Ask three tough questions during my demo on [TOPIC], then provide the best answers I should give.”

**Examples**:

* “Role play as a Head of Logistics who doubts ETA predictions. Ask three challenges; then draft concise answers I can say live.”
* “Role play as a CFO sceptical about ROI. Ask three objections about cost savings and payback period, then provide executive-level responses.”
* “Role play as an IT Security Officer concerned about data residency. Ask three questions, then draft neutral, fact-based answers.”

### Step‑by‑Step / Process Decomposition

**What:** Break down complex work into clear stages such as introduction, discovery, proof, and close.

**Why:** Presales tasks often involve many moving parts. By structuring them step by step, you avoid skipping necessary actions and ensure nothing gets lost. This is especially valuable for demos, pilots, and onboarding.

**When:** Use this when designing proof of concepts, pilots, onboarding plans, or long demos that require precise sequencing.

**Pitfalls:** If steps are too high-level, the AI output may remain vague. Always request objectives, actions, and evidence for each stage to make the plan actionable.

**So What:** Step-by-step prompting helps you turn big, complex activities into manageable chunks. It makes your deliverables clearer, easier to follow, and more credible for clients who expect a structured process.

**Pro Tip:** Always add acceptance criteria or measurable outcomes to each step. This shifts the output from being a task list to a success plan you can present with confidence.

**Template**:

“Outline a [N]-step plan for [TASK]. For each step: objective, actions, evidence.”

**Examples**:

* “Outline a 6-step pilot plan for an ICS2 compliance proof, including objectives, actions, and acceptance criteria.”
* “Create a 5-step onboarding process for a global trade automation solution. For each step: objective, key actions, and success metric.”
* “Draft a 7-step demo flow for customs declaration automation. Each step should include a goal, the feature shown, and the business proof.”

### Iterative Refinement (Critique‑then‑Create)

**What:** Ask the AI to draft content, critique it for weaknesses, and then rewrite it in an improved form.

**Why:** This process raises quality without starting from scratch. It is especially useful when you need polished outputs for client-facing materials such as objection handling, proposals, or executive briefs.

**When:** Use this when the first draft feels too generic, lacks evidence, or does not match your audience’s tone.

**Pitfalls:** If you don’t specify what to critique, the AI may give shallow feedback. Always define clear critique categories such as clarity, evidence, and tone.

**So What:** Iterative refinement gives you stronger, more professional results. Instead of settling for the first draft, you get a built-in review cycle that mirrors how a senior colleague would coach and improve your work.

**Pro Tip:** Ask the AI to explain why it made each change. This turns the process into a coaching exercise, helping you and your team learn how to improve future drafts.

**Template**:

“Draft [X]. Then write a 3-point critique (clarity, evidence, tone). Produce an improved version.”

**Examples**:

* “Draft an objection response to ‘We already have Competitor X.’ Critique it for clarity, evidence, and tone. Rewrite in a neutral, evidence-based style.”
* “Write a 150-word executive summary of a customs automation pilot. Then critique it on jargon, proof, and persuasiveness. Produce an improved version.”
* “Draft three discovery questions for a Head of Procurement. Critique them for specificity, buyer relevance, and language simplicity. Rewrite improved versions.”

### Role Chaining (Sequential Personas)

**What:** Instruct the AI to respond sequentially as different roles, showing multiple perspectives in one run.

**Why:** In presales, the same solution must resonate with Compliance, Finance, Logistics, and IT. Role chaining creates a 360° stakeholder view.

**When:** Use for objection handling, business case development, or preparing for multi-stakeholder demos.

**Pitfalls:** Without clear sequencing, outputs can blur together. Always specify role order and format.

**So What:** Role chaining prepares you for real-world conversations across the buying center and ensures your message hits each persona’s priorities.

**Pro Tip:** Add a “summary role” at the end (e.g., “CEO”) to consolidate the perspectives into one decision-ready view.

**Template**:

“Respond to [TOPIC] in sequence as: (1) Compliance Officer, (2) CFO, (3) Logistics Director. End with a CEO summary that balances all views.”

**Examples**:

* “Evaluate SaaS customs automation as Compliance, CFO, Logistics. CEO concludes with go/no-go.”
* “Role chain on HS classification automation: Compliance (risk), CFO (ROI), CIO (integration). CEO decides.”

## Reasoning & Exploration (12)

| # | Technique | What it Does | Why it Matters | Best Use Cases |
| --- | --- | --- | --- | --- |
| 4.3.1 | Chain of Thought (CoT) | Shows reasoning in short, structured bullets before the recommendation. | Makes tradeoffs (cost, risk, speed) transparent and credible. | Solution options, architecture tradeoffs, compliance approaches. |
| 4.3.2 | Tree of Thoughts (ToT) | Explores multiple solution paths, compares, then selects best. | Mirrors scenario planning and decision records, builds trust. | Solution design reviews, pilot planning, compliance strategy. |
| 4.3.3 | Self-Consistency | Generates several independent answers, then merges into one. | Reduces errors from single-path reasoning; more reliable outputs. | Pilot scope, ROI estimates, compliance workflows. |
| 4.3.4 | Step Back Prompting | Identifies first principles before proposing solutions. | Anchors decisions in compliance, regulations, and outcomes. | Early debates, rushed feature talks, exec discussions. |
| 4.3.5 | Least to Most | Solves simple version first, then builds to full complexity. | Makes complex ROI/migration models digestible. | ROI models, migration planning, demo explanations. |
| 4.3.6 | Self Ask | AI generates and answers key sub-questions, then synthesizes plan. | Surfaces hidden blockers (data, integration, policy). | Discovery sessions, pilot scoping, risk assessments. |
| 4.3.7 | Program of Thought (PoT) | Combines reasoning with small code snippets for calculations. | Eliminates math errors in TCO/ROI; adds proof to business cases. | ROI models, cost comparisons, financial justifications. |
| 4.3.8 | Graph of Thought (GoT) | Maps decision as graph: nodes = criteria, edges = dependencies. | Shows interdependencies in trade/supply chain decisions. | Architecture workshops, compliance workflows, IT/security trade-offs. |
| 4.3.9 | Skeleton of Thought (SoT) | Produces outline first, expands once approved. | Prevents wasted effort on misaligned drafts. | Demo flows, RFP answers, one-pagers, agendas. |
| 4.3.10 | Plan and Solve | Creates structured plan, then executes step by step. | Ensures coverage, sequencing, and transparency. | Roadmaps, migration strategies, risk mitigation. |
| 4.3.11 | Multi-Agent Debate | Simulates expert personas debating options with judge decision. | Surfaces trade-offs across roles; robust recommendations. | Build vs buy, cloud vs on-premise, process alternatives. |
| 4.3.12 | Contrastive Prompting | Highlights crisp differences between options. | Produces decision-ready trade-off clarity for execs. | Decision slides, business cases, architecture choices. |

### Chain-of-Thought (CoT) - High-level reasoning

**What:** Ask the AI to show its reasoning in a structured way, such as a short, numbered list, before giving the final recommendation.

**Why:** This is valuable for evaluating tradeoffs where multiple factors matter, such as balancing cost, risk, and speed in global trade decisions. It makes the AI’s logic transparent and easier to validate.

**When:** Use CoT when analyzing solution options, making architecture tradeoffs, or comparing compliance approaches where rationale is as important as the answer itself.

**Pitfalls:** Without limits, the AI may produce overly verbose explanations. Always specify a maximum number of bullets or headline points to keep the reasoning clear and concise.

**So What:** Chain of Thought prompting helps you avoid “black box answers.” You get structured reasoning that you can review, challenge, and present to clients as a decision rationale, making your recommendations more credible.

**Pro Tip:** Ask the AI to present rationale as executive-ready bullets instead of free text. This way, the same output can be used directly in slides or proposals.

**Template**:

“Show a concise, numbered rationale (max [N] bullets) before the final recommendation.”

**Examples**:

* “Evaluate batch vs. real-time denied party checks for cross-border orders. Provide a 5-bullet rationale, then a clear recommendation.”
* “Assess three customs clearance options for EU imports. List 4 bullets on tradeoffs (cost, compliance, speed, scalability), then give a final recommendation.”
* “Review on-premise vs cloud deployment for a GTM solution. Show reasoning in 3 bullets before the conclusion.”

### Tree-of-Thoughts (ToT)

**What:** Explore several distinct solution paths, compare them, and pick the best one.

**Why:** This mirrors architecture decision records and scenario planning. It helps you compare options for data residency, compliance workflows, integration patterns, or build vs buy in a structured way.

**When:** Use during solution design reviews, pilot planning, integration choices, and compliance strategy discussions.

**Pitfalls:** If the options are too similar, the exercise adds no value. Always define clear assumptions and comparison criteria, and end with a single selection plus rationale.

**So What:** ToT forces breadth before depth. You show stakeholders that you explored viable paths and chose the best one for their goals, which builds trust and speeds decisions.

**Pro Tip:** Set fixed comparison criteria up front. For example: cost, time to value, compliance risk, data residency fit, and change effort. Ask for a quick table first, then a short recommendation with one risk and one mitigation.

**Template**:

“List 3 distinct solution paths for [PROBLEM]. For each: key assumptions, pros, cons. End with a selection and why.”

**Examples**:

* “Three architectures for EU data residency in a GTM platform: single tenant EU region, multi-region partitioning, EU processing with tokenisation. Choose one and justify.”
* “Three approaches to HS classification improvement for a 6-week pilot: manual with QA, rules-based automation, ML assisted with human in the loop. Recommend one with reason.”
* “Three timing options for denied party screening: real time at order create, batch pre shipment, hybrid incremental checks. Select the best for a high volume retailer and explain why.”

### Self-Consistency

**What:** Ask the AI to generate multiple independent answers to the same question, then merge them into a single, consistent final response.

**Why:** This reduces the risk of mistakes that come from following only one reasoning path. In supply chain and global trade, where estimates and plans can vary widely (e.g., pilot scope, ROI, or compliance workflows), comparing alternatives helps identify the most realistic outcome.

**When:** Use for scoping pilots, building estimates, or validating assumptions where accuracy matters.

**Pitfalls:** Without guidance, the model might just rephrase the same answer three times. Be explicit that each answer should come from a different angle (e.g., financial, operational, compliance).

**So What:** Self-consistency prompting gives you stronger, cross-validated outputs. Instead of relying on a single draft, you get triangulated insights that are more reliable to present to stakeholders.

**Pro Tip:** Label each version clearly (e.g., “Operational View,” “Compliance View,” “Financial View”) before the synthesis. This makes the final output easier to defend and reuse in presentations.

**Template**:

“Answer this question 3 different ways; then synthesize the most consistent answer.”

**Examples**:

* “Estimate pilot scope for HS classification improvements in 6 weeks. Provide 3 scope variants (minimal, moderate, full). Then synthesize the most realistic one.”
* “Draft 3 ROI calculations for trade automation (time savings, error reduction, cash flow). Then merge into one balanced business case.”
* “Write 3 different risk assessments for outsourcing broker management (security, operational, compliance). Then produce the most consistent final view.”

### Step-Back Prompting

**What:** Ask the AI to identify first principles or core rules before jumping into solutions.

**Why:** This prevents rushing into feature discussions and keeps the focus on compliance, regulations, and business outcomes. It helps anchor decisions in non-negotiables like legal obligations, financial impact, and operational feasibility.

**When:** Use when clients want to debate features too early, when a decision feels rushed, or when you need to reframe discussions around fundamentals (e.g., compliance risk before technology fit).

**Pitfalls:** If principles are too generic (“compliance matters,” “cost should be low”), the exercise loses value. Always ask for 3-5 principles tied to the specific domain.

**So What:** Step Back Prompting shifts the conversation from “what tool” to “what matters.” This builds credibility with executives and ensures your recommendations are rooted in real business priorities, not just technical options.

**Pro Tip:** After listing first principles, ask the AI to use them as a filter to justify why one option is stronger than others. This makes the recommendation both principled and practical.

**Template**:

“List 3 first principles that govern [TOPIC]. Use them to decide among options A/B/C.”

**Examples**:

* “First principles for sanctions screening in EU/US trade; then decide alert thresholds and review workflow.”
* “List 3 first principles for cross-border data residency in customs filings. Use them to choose between local hosting, tokenisation, or regional cloud.”
* “Identify first principles for trade compliance audits. Then decide if automation, manual review, or hybrid controls is the best fit.”

### Least-to-Most

**What:** Break a complex problem into simpler versions, solve them step by step, and then build up to the full solution.

**Why:** This is effective for complex ROI models, migration planning, or compliance processes where jumping straight into full complexity can overwhelm both you and your stakeholders. Building layer by layer creates clarity and reduces errors.

**When:** Use when explaining financial models, process redesigns, or technical migrations to non-technical audiences. It works especially well in demos or workshops where you want to “teach by showing.”

**Pitfalls:** If increments are too large, stakeholders may miss the learning path. Define 3-4 progressive steps, each adding one meaningful layer of complexity.

**So What:** Least to Most prompting makes complexity digestible. It allows you to guide clients from a simple starting point to a sophisticated solution, ensuring they understand how you arrived at the final recommendation.

**Pro Tip:** Visualize each step (e.g., in a table or flow) so stakeholders see the “build-up” instead of being handed a black-box final model.

**Template**:

“Start with a minimal case; expand to full complexity in three increments.”

**Examples**:

* “Landed cost modelling: Step 1 duties only, Step 2 duties + freight, Step 3 duties + freight + accessorials + FX + VAT. Provide the final formula and example.”
* “Pilot rollout plan: Step 1 single country, Step 2 multi-region with shared services, Step 3 global rollout with automation and monitoring.”
* “Denied party screening workflow: Step 1 manual checks, Step 2 automated batch, Step 3 real-time API integrated with ERP.”

### Self-Ask

**What:** Ask the AI to generate the key sub-questions a role would naturally ask, answer them briefly, and then synthesise an action plan from the insights.

**Why:** This surfaces hidden blockers that often stall projects. Such as missing data, integration gaps, or unclear policies. It helps uncover risks early and frames them as actionable steps.

**When:** Use in discovery sessions, pilot scoping, or risk assessments where the full problem space is unclear. It’s especially valuable when preparing for stakeholder workshops or executive Q&A.

**Pitfalls:** If the AI poses trivial or overly generic sub-questions, the output has little value. Always specify the role and context (e.g., “EU apparel importer, 3PL integration, strict data residency”).

**So What:** Self-Ask prompting gives you a structured way to anticipate objections and blockers before they arise. This improves your readiness in presales conversations and shows clients you think like their internal experts.

**Pro Tip:** Ask the AI to tag each sub-question with a category (e.g., Data, Compliance, Integration, Cost). This makes the final action plan easier to structure into slides or a risk register.

**Template**:

“Pose 5 sub-questions a [ROLE] would ask about [TOPIC], answer briefly, then synthesise an action plan.”

**Examples**:

* “Trade Compliance Officer: Pose 5 sub-questions on automating EU customs entries, answer briefly, then synthesise a change plan.”
* “CFO: Pose 5 sub-questions on calculating ROI for trade automation, answer briefly, then create a 3-step exec summary plan.”
* “Head of Logistics: Pose 5 sub-questions on cross-border shipment visibility, answer briefly, then recommend a rollout roadmap.”

### Program-of-Thought (PoT)

**What:** Ask the AI to combine reasoning steps with small code snippets (often Python) to run calculations, then explain the results in business language.

**Why:** This removes the risk of math errors in complex TCO, ROI, or landed cost models. It ensures that the logic behind financial and operational outcomes is transparent and can be reused. In presales, this builds credibility when discussing numbers with CFOs or operations leaders.

**When:** Use when creating ROI models, cost comparisons, or operational efficiency scenarios that involve calculations. It is particularly powerful when you want to show “proof math” behind business cases.

**Pitfalls:** Overly complex code can distract stakeholders. Keep snippets simple and ensure the output is explained in plain business terms.

**So What:** PoT makes your financial and operational arguments bulletproof. By combining code with executive-ready interpretation, you can demonstrate both analytical rigor and business relevance.

**Pro Tip:** Always request the AI to output results in two layers: the **calculation logic (code)** and the **executive summary (3–5 bullets)**. This way, you have both technical validation and stakeholder-ready messaging.

**Template**:

“Provide a short Python snippet to compute [KPI] from [INPUTS], then interpret results for executives (3 bullets).”

**Examples**:

* “Compute 3-year TCO of manual vs automated HS classification (inputs: volumes, rework rate, salary bands). Interpret for CFO.”
* “Provide a Python snippet to calculate duty savings from implementing a Free Trade Agreement. Interpret the result in 3 bullets for a COO.”
* “Generate code to simulate customs clearance cycle times across 3 regions. Interpret findings for a Head of Logistics.”

### Graph-of-Thought (GoT)

**What:** Ask the AI to represent a decision as a graph with **nodes** (criteria, factors) and **edges** (dependencies, interactions), then recommend the best path forward.

**Why:** Many supply chain and trade challenges are interconnected. Decisions about data residency affect compliance, user access, and auditability. A graph view makes these interdependencies explicit and helps avoid siloed thinking.

**When:** Use when a decision involves multiple moving parts that influence each other, such as system integrations, compliance workflows, or IT/security trade-offs. Especially useful in architecture or process design workshops.

**Pitfalls:** Graphs can get too complex if every minor factor is included. Focus on 5-7 core nodes and their most relevant dependencies.

**So What:** GoT helps you show stakeholders why a decision is not isolated and provides a structured way to navigate trade-offs. This demonstrates systems-level thinking, which executives value in presales.

**Pro Tip:** Ask the AI to output the graph both as a **list of nodes and edges** and as a **recommendation summary**. If possible, visualise it in a diagram for presentation impact.

**Template**:

“Create a decision graph for [TOPIC]. List nodes (criteria) and edges (dependencies). Derive the recommended path.”

**Examples**:

* “Graph for choosing batch vs streaming events for shipment status across carriers; recommend an integration pattern.”
* “Decision graph for implementing EU data residency: nodes (latency, compliance, cost, integration) and edges (cost ↔ performance, compliance ↔ hosting). Recommend the best approach.”
* “Graph of decision criteria for automating denied party screening: nodes (accuracy, speed, false positives, integration effort). Recommend the optimal balance.”

### Skeleton-of-Thought (SoT)

**What:** Start with a structured outline before expanding into full content. The AI produces a “skeleton” first, then fleshes it out once approved.

**Why:** This avoids wasted effort on long drafts that miss the mark. In presales, it helps align quickly with stakeholders on structure before investing in detailed demos, RFP responses, or executive one-pagers.

**When:** Use for building demo flows, workshop agendas, RFP answers, whitepapers, or executive updates. It is especially useful when time is limited, and you need early validation of the storyline.

**Pitfalls:** If the outline is too vague, expansion may still fall short of expectations. Always define the number of sections, the target audience, and the required level of detail.

**So What:** Skeleton of Thought speeds up collaboration with customers and internal teams. It allows you to validate direction first, then expand, which reduces rework and increases confidence in the final product.

**Pro Tip:** Ask the AI to add **proof points or data placeholders** to each section of the skeleton. This ensures the expanded version doesn’t drift into generic filler text.

**Template**:

“Produce a [N]-point outline for [ASSET]. After I approve, expand each point to [DETAIL] with one proof item.”

**Examples**:

* “Outline a 20-minute demo for customs automation. After approval, expand each step with data points and customer evidence.”
* “Produce a 7-point outline for an RFP security section. Expand each point with 2–3 sentences and reference product documentation.”
* “Draft a 5-step skeleton for a value engineering business case. Expand each step with ROI data and client KPIs.”

### Plan-and-Solve

**What:** Ask the AI to create a structured plan first, then execute it step by step to deliver the complete answer.

**Why:** Complex supply chain and trade tasks often fail when tackled in one go. A plan-first approach ensures coverage, logical sequencing, and transparency of reasoning. It’s especially useful in presales when you need both the how and the what.

**When:** Use for migration strategies, implementation roadmaps, proof-of-concept designs, or risk mitigation plans. It works well for tasks that involve multiple stages, owners, or dependencies.

**Pitfalls:** If the plan is too abstract, execution may drift. Always define the level of detail expected (e.g., milestones, roles, KPIs) before the AI starts executing.

**So What:** Plan and Solve reduces oversights and builds trust with stakeholders by showing a clear process before diving into execution. It mirrors how consulting teams structure projects, which resonates with executives.

**Pro Tip:** Ask the AI to include **risks and mitigations** in the final step. This shows foresight and strengthens credibility in executive conversations.

**Template**:

“Create a [N]-step plan to address [TASK]; then execute each step concisely, and end with risks & mitigations.”

**Examples**:

* “Create a 5-step plan to replace spreadsheet-based broker management with API-driven flows. Execute each step and list risks & mitigations.”
* “Draft a 6-phase plan for rolling out automated HS classification in 3 regions. Execute with timelines and KPIs.”
* “Plan and execute a 4-step roadmap for integrating sanctions screening into ERP workflows. End with the top 3 risks and mitigations.”

### Multi-Agent Debate / Self-Debate

**What:** Simulate a debate between two or more expert personas with opposing views. After several rounds, a “judge” persona evaluates the arguments against clear criteria and selects the best outcome.

**Why:** Many trade and supply chain decisions involve trade-offs (e.g., cost vs compliance, speed vs accuracy). By running a structured debate, you can surface hidden assumptions and test the strength of each option before presenting to stakeholders.

**When:** Use for build vs buy evaluations, cloud vs on-premise decisions, feature prioritization, or process design alternatives. This is especially powerful when multiple departments (Finance, IT, Compliance) have conflicting priorities.

**Pitfalls:** Without clear judging criteria, debates can go in circles. Define success criteria upfront (e.g., compliance risk, cost efficiency, scalability). Also, avoid too many “agents”. 2-3 voices are usually enough.

**So What:** Multi-Agent Debate gives you a safe environment to test arguments before facing real stakeholders. It ensures your final recommendation is robust, balanced, and backed by multi-perspective reasoning.

**Pro Tip:** Ask the AI to structure the debate in **rounds** (e.g., opening statement, rebuttal, judge decision). This mirrors real-world discussions and makes the output easier to follow.

**Template**:

“Agent A argues for [Option 1], Agent B for [Option 2]. Two rounds. Judge selects the winner using criteria [C1, C2, C3].”

**Examples**:

* “Debate: real-time vs scheduled denied party checks. Judge by compliance risk, latency, and operational cost.”
* “Agent A argues for single-tenant EU hosting, Agent B for multi-region partitioning. Judge by compliance, latency, and cost.”
* “Debate whether to centralize or decentralize customs broker management. Judge by scalability, risk exposure, and implementation effort.”

### Contrastive Prompting

**What:** Ask the AI to highlight differences between options rather than just listing each.

**Why:** Executives don’t want walls of text. They want crisp trade-offs. Contrastive prompting forces the AI to compare head-to-head (e.g., batch vs real-time screening).

**When:** Use in decision slides, business cases, and architecture choices.

**Pitfalls:** Without clear criteria, contrasts can be vague. Always define comparison dimensions (cost, risk, speed, etc.).

**So What:** Contrastive prompting creates decision-ready outputs that help buyers quickly see why one option is stronger.

**Pro Tip:** Ask for a summary row: “Which option is best under what conditions?”

**Template**:

“Compare [OPTION A] vs [OPTION B] across {criteria1, criteria2, criteria3}. Highlight differences, not just descriptions.”

**Examples**:

* “Contrast batch vs real-time denied party checks on compliance risk, latency, and cost.”
* “Compare broker-led vs API-led customs filing on control, scalability, and ROI.”
* “Show differences between EU data residency architectures: single tenant vs multi-region.”

## Verification & Safety (7)

| # | Technique | What it Does | Why it Matters | Best Use Cases |
| --- | --- | --- | --- | --- |
| 4.4.1 | Chain of Verification (CoVe) | Drafts, then creates verification questions, answers them, and revises into a validated version. | Reduces compliance errors and builds trust by embedding quality checks. | Compliance docs, duty calculations, RFP answers, executive deliverables. |
| 4.4.2 | Retrieval Augmented Generation (RAG) | Grounds outputs only in provided sources; says “insufficient data” if not found. | Aligns answers with regulations, product docs, and policies; avoids risky assumptions. | RFP responses, compliance docs, legal frameworks, product comparisons. |
| 4.4.3 | Self-RAG | Lets AI decide when to retrieve from sources, revises if needed. | Balances speed and accuracy; ensures trust in mixed Q&A or compliance settings. | Live Q&A, compliance checks, technical workshops. |
| 4.4.4 | ReAct (Reason + Act) | Combines short reasoning with specific actions/lookups, then finalizes answer. | Makes reasoning auditable; powerful for complex integrations and compliance. | Technical mappings, troubleshooting, security/compliance Q&A. |
| 4.4.5 | Reflexion | Produces draft, critiques it, then revises with improvements. | Ensures continuous improvement of presales outputs (slides, demos, RFPs). | Demo flows, ROI justifications, objection handling, executive briefs. |
| 4.4.6 | Active Prompt | Dynamically selects the most relevant examples from a case library. | Tailors outputs with industry-specific credibility; avoids generic answers. | Proof points, ROI slides, objection handling, customer stories. |
| 4.4.7 | OPRO (Automatic Prompt Optimization) | Generates prompt variants, scores them, and selects best. | Standardizes high-quality prompts across presales teams; raises consistency. | Discovery prompts, demo scripts, objection responses, team playbooks. |

### Chain-of-Verification (CoVe)

**What:** Ask the AI to generate an initial draft, then create verification questions, answer them, and finally revise the output into a validated version.

**Why:** In global trade and supply chain, accuracy is critical. A single mistake in customs compliance, duty calculation, or documentation can result in fines, delays, or lost trust. CoVe adds a built-in quality check to reduce errors and ensure compliance with regulations.

**When:** Use when creating compliance-related content, financial justifications, security documentation, or executive deliverables where factual accuracy is essential.

**Pitfalls:** If verification questions are too superficial, the process won’t add value. Encourage the AI to ask probing questions about assumptions, sources, and regulatory requirements.

**So What:** CoVe helps you deliver more reliable outputs in presales by reducing the risk of “hallucinations” or misleading claims. It shows customers that you take compliance and accuracy seriously, which builds credibility.

**Pro Tip:** Ask the AI to **list assumptions explicitly** in the verified final. This makes gaps visible and avoids overconfidence in the answer.

**Template**:

“Draft the answer. Propose 3 verification questions. Answer them. Provide a verified final with assumptions noted.”

**Examples**:

* “Draft: ‘Do we meet EU data residency for customs data?’ Verification: propose 3 checks on storage, logs, and audit trails. Revise with assumptions.”
* “Write an RFP answer on encryption at rest/in transit. Propose 3 verification questions. Finalize with compliance notes.”
* “Generate a duty savings calculation. Ask 3 verification questions on volumes, duty rates, and FX assumptions. Provide revised numbers.”

### Retrieval-Augmented Generation (RAG)

**What:** Guide the AI to generate answers based only on provided sources, such as documents, policies, or product manuals. If the information isn’t in the sources, the AI should state that clearly.

**Why:** In supply chain and global trade, precision matters. Customers want answers that align with official policies, product limits, or regulatory texts. RAG grounds outputs in facts, avoiding risky assumptions and ensuring alignment with source material.

**When:** Use in RFP responses, compliance documentation, product comparisons, or when referencing legal frameworks (e.g., EU data residency, customs regulations).

**Pitfalls:** If sources are not well-structured or too broad, the AI may miss key details. Break long documents into smaller sections and clearly specify which passages to use.

**So What:** RAG turns AI from a “creative assistant” into a “factual assistant.” In presales, this builds trust with customers by showing that your outputs are verifiable and aligned with official materials. It also saves time by reducing manual cross-checks.

**Pro Tip:** Combine RAG with **citations**. Ask the AI to reference passage IDs or section numbers so you can validate the answer quickly with the source.

**Template**:

“Use only the passages below. If not found, say ‘insufficient data’. Cite passage IDs.”

**Examples**:

* “Using these product docs, draft an RFP section on SAML SSO. Only reference provided passages.”
* “Generate an answer on EU ICS2 compliance based on the attached regulation summary. If data is missing, state ‘insufficient data’.”
* “Write an executive summary of our duty optimization module using only the provided case study. Cite passage numbers.”

### Self-RAG

**What:** Let the AI decide when to retrieve additional information from a knowledge base or document set. The model drafts an answer, checks if confidence is low, performs retrieval, and then revises with citations.

**Why:** Not every presales or compliance question needs an external lookup. Self-RAG balances efficiency and accuracy by retrieving only when necessary. This is especially useful when dealing with large corpora like product manuals, trade regulations, or policy libraries.

**When:** Use for Q&A sessions, compliance checks, or technical deep dives where some answers are straightforward but others require grounding in documentation.

**Pitfalls:** If confidence thresholds are not clear, the AI might skip retrieval when needed or retrieve too often. Always set explicit rules for when to pull sources (e.g., when regulatory, security, or product claims are involved).

**So What:** Self-RAG ensures that answers are both fast and trustworthy. In presales, this helps you maintain momentum in conversations while keeping compliance and technical details accurate. It prevents over-reliance on memory and builds credibility.

**Pro Tip:** Ask the AI to include a short **critique step** after retrieval (“Does this new evidence change the draft?”). This keeps reasoning transparent and improves the final output.

**Template**:

“If confidence < threshold, retrieve using these keywords: […]. Critique the draft and revise with citations.”

**Examples**:

* “Security Q&A on encryption at rest/in transit; retrieve only if draft lacks certainty. Revise with citations.”
* “Customs compliance briefing on ICS2. If the draft is vague, retrieve from EU regulation docs, then update answer.”
* “Product integration question on SAP. Retrieve only if draft doesn’t include version-specific details.”

### ReAct (Reason + Act)

**What:** Combine reasoning with specific actions, such as document lookup, data queries, or tool use. The AI shows short reasoning steps, performs actions, and then delivers the final answer.

**Why:** Many supply chain and global trade questions require both logic and evidence. For example, mapping SAP shipment statuses to carrier events requires reasoning (how they align) plus action (checking integration docs). ReAct makes the process transparent and auditable.

**When:** Use for technical integration mapping, compliance Q&A, troubleshooting, or anywhere an audit trail of “why this answer” is needed.

**Pitfalls:** If reasoning steps are too long, the output becomes hard to follow. Keep the “Reason” notes concise. If the environment doesn’t allow tool access, clarify that ReAct is for structured reasoning plus simulated lookups.

**So What:** ReAct builds trust by showing how an answer was reached, not just the final result. In presales, this is powerful for technical workshops and RFP responses, where customers want evidence of thought process and alignment with official documentation.

**Pro Tip:** Ask the AI to structure outputs as **Reason → Action → Answer** blocks. This keeps the process clean and easy to reuse in demos or documentation.

**Template**:

“Think in brief ‘Reason’ steps. When needed, perform ‘Action: [LOOKUP X]’. Finish with ‘Answer’.”

**Examples**:

* “ReAct on: ‘How do we map SAP shipment statuses to carrier events in our API?’ (Action steps reference integration docs).”
* “Customs regulation Q&A: Reason through duty thresholds, Action: lookup tariff schedule, Answer: compliance recommendation.”
* “Product security discussion: Reason about authentication flow, Action: check SSO guide, Answer: executive summary.”

### Reflexion

**What:** Ask the AI to generate a first draft, then write a short self-critique with lessons learned, and finally revise the draft with improvements applied.

**Why:** In supply chain and global trade, presales teams often reuse demo scripts, value slides, or RFP answers. Without reflection, the same weak spots (too much jargon, missing ROI proof, unclear compliance notes) get repeated. Reflexion forces continuous improvement with each iteration.

**When:** Use when refining demo flows, objection responses, ROI justifications, or executive briefs. Especially valuable for repeated assets that evolve over a sales cycle.

**Pitfalls:** If the critique is too shallow (“make it better”), the revised draft won’t improve. Ask for at least two to three specific lessons (e.g., simplify jargon, add proof point, adjust tone).

**So What:** Reflexion helps you consistently raise the quality of presales outputs instead of starting fresh each time. Over time, this builds a library of polished, customer-ready assets that reflect learning from real conversations.

**Pro Tip:** Save both the critique and the improved draft. This creates a “learning trail” you can share across the presales team for faster onboarding and consistent messaging.

**Template**:

“Produce first draft. Add ‘Reflexion:’ with 2–3 improvements. Apply them in a second draft.”

**Examples**:

* “Reflexion on a demo script for customs declarations: reduce jargon; add a quantified proof point. Rewrite accordingly.”
* “Draft an RFP answer on SSO integration. Reflexion: shorten sentences; include compliance wording; shift tone to executive-ready. Revise final.”
* “Create an objection response to ‘Our broker already handles that.’ Reflexion: avoid defensiveness; highlight automation benefits; include customer proof.”

### Active‑Prompt

**What:** Dynamically select the most relevant examples (few-shot prompts) from a library of case studies, demo scripts, or customer stories to guide the AI’s output.

**Why:** In presales for supply chain and global trade, not every example resonates with every customer. An international retailer cares about duty relief and working capital, while a pharma shipper cares about cold chain compliance. Active Prompt ensures the AI pulls from the most relevant assets instead of generic or mismatched ones.

**When:** Use in RFP responses, demo proof points, ROI slides, or objection handling where credibility depends on using the closest possible customer example.

**Pitfalls:** If your example library is small or not tagged by industry/region/volume, the AI may select poor matches. Maintain and update your library with metadata (industry, region, solution area, KPIs).

**So What:** Active Prompt ensures that presales outputs feel tailored, not recycled. This increases customer trust and shortens preparation time, since the AI automatically finds the best-fit examples instead of you manually digging through decks and PDFs.

**Pro Tip:** Combine Active Prompt with **context enrichment** (industry, region, systems) so the AI chooses examples that both match the customer profile and highlight the right solution benefits.

**Template**:

Given these 20 case studies, choose 3 most similar to [COMPANY/INDUSTRY/REGION] and generate a tailored proof slide.”

**Examples**:

* “Pick closest EU apparel importers; create proof points for an executive slide.”
* “From these case studies, select 2 most relevant for an Asian electronics manufacturer, then draft ROI bullets.”
* “Choose the best pharma compliance success story for cold chain shipping, and adapt into a 2-minute demo script.”

### OPRO (Automatic Prompt Optimisation)

**What:** Iteratively improve a prompt by generating multiple variants and scoring them against predefined criteria (clarity, specificity, buyer relevance).

**Why:** In presales, the way you frame a prompt directly impacts the quality of discovery questions, demo scripts, and ROI narratives. OPRO helps standardise prompts so the whole team consistently produces high-quality, customer-relevant outputs instead of one-off versions that vary by individual style.

**When:** Use when refining prompts for discovery, objection handling, executive summaries, or any reusable asset that the team will use repeatedly. This is especially valuable when onboarding new consultants who benefit from “best-in-class” prompts.

**Pitfalls:** If scoring criteria are vague (“good” vs “bad”), the optimisation will not add much value. Define concrete scoring dimensions such as “specific to persona,” “measurable ROI,” and “executive ready.”

**So What:** OPRO turns prompt writing into a repeatable, measurable process. Instead of guessing which prompt works best, you get data-driven improvement. This raises the baseline quality of presales work and ensures consistency across regions and industries.

**Pro Tip:** Store optimised prompts in a shared library (tagged by persona, industry, and use case). This creates a scalable resource for the entire presales team.

**Template**:

“Optimise this prompt for [GOAL]. Show 3 variants with a 1-5 score on [criteria].”

**Examples**:

* “Optimize our discovery prompt for a Trade Compliance persona to increase specificity and ROI focus.”
* “Take this demo script prompt and optimize for executive tone, clarity, and supply chain ROI proof points.”
* “Refine this objection handling prompt (‘We already have Competitor X’) to maximize neutrality, credibility, and compliance focus.”

## Workflow & Automation (4)

| # | Technique | What it Does | Why it Matters | Best Use Cases |
| --- | --- | --- | --- | --- |
| 4.5.1 | Directional Stimulus Prompting (DSP) | Uses short, targeted cues or keywords to shape outputs. | Keeps value bullets sharp and aligned with customer hot buttons. | Executive slides, 1-pagers, campaign taglines, demo proof points. |
| 4.5.2 | ReWOO (Reasoning Without Observation) | Separates planning from retrieval: plan first, then batch lookup, then synthesize. | Creates structured, auditable outputs for complex compliance/RFP tasks. | RFPs, security docs, compliance assessments, integration notes. |
| 4.5.3 | RISEN Framework | Provides a 5-part frame: Role, Instructions, Steps, End goal, Narrowing. | Standardizes presales outputs, making them consistent and repeatable. | Pilot plans, discovery frameworks, demo scripts, playbooks. |
| 4.5.4 | Prompt Chaining | Breaks big tasks into smaller linked prompts, feeding one into the next. | Prevents overwhelm and compounding errors; keeps outputs structured. | Multi-step RFPs, ROI models, migration plans, exec briefs. |

### Directional Stimulus Prompting (DSP)

**What:** Provide short, targeted cues or keywords that must appear in the output, instead of long instructions.

**Why:** In presales, you often need quick, focused bullets for slides, one-pagers, or executive emails. DSP ensures the AI highlights the exact benefits or proof points you want (e.g., duty relief, audit readiness, carbon reporting) without bloated text.

**When:** Use when creating value bullets, campaign taglines, executive proof slides, or short demo intros. Perfect when time is tight, and you want the AI to “stick to the storyline.”

**Pitfalls:** If you overload DSP with too many keywords, the text feels forced or robotic. Limit to 3-5 strong cues.

**So What:** DSP gives you fast, on-message outputs that you can drop directly into sales decks, RFPs, or demo slides. This keeps messaging sharp, consistent, and aligned with the customer’s hot buttons.

**Pro Tip:** Combine DSP with **tone guidance** (executive-ready, neutral, or advisory) to make the output immediately customer-facing.

**Template**:

“Directional cues: {duty relief, audit readiness, low code integration}. Generate 5 value bullets for CIO.”

**Examples**:

* “DSP for a 1-pager: emphasize {risk reduction, EU data residency, automation speed}.”
* “Generate 4 demo proof points using cues {faster clearance, working capital release, carbon reporting}.”
* “Create 5 subject lines for a campaign invite. Cues: {compliance proof, ROI, audit readiness}.”

### ReWOO (Reasoning Without Observation)

**What:** Separate the planning phase from the retrieval or tool calls. First, the AI drafts a structured research plan without consulting any external sources. Then it performs all the retrieval in a single batch, followed by a synthesis of the final answer.

**Why:** In supply chain and global trade presales, RFP responses and security questionnaires often require structured answers across many sections (e.g., audit logging, data residency, integration). ReWOO avoids the inefficiency of random lookups and ensures nothing is missed.

**When:** Use for long, multi-section tasks like RFPs, security documents, or compliance assessments where you need a clean, auditable process.

**Pitfalls:** If the initial research plan is too vague, the retrieval step will not cover all requirements. Push for specific subtopics and criteria before moving on.

**So What:** ReWOO gives you structured, efficient, and auditable outputs. Instead of piecemeal answers, you get a well-planned response that saves time and avoids gaps. Critical for winning RFPs and passing security reviews.

**Pro Tip:** Share the initial “plan phase” with teammates or SMEs for validation before executing retrieval. This ensures alignment and saves time on corrections later.

**Template**:

“Create a research plan (no lookups yet). Then perform all the retrieval in one batch. Synthesise final answer with citations.”

**Examples**:

* “ReWOO on: ‘Document our audit logging against customer’s controls A–D.’”
* “Draft a research plan for answering 20 RFP questions on customs compliance. Then retrieve once and synthesise.”
* “Plan how to map SAP shipment statuses to carrier milestones. Batch retrieve specs, then generate final integration notes.”

### RISEN Framework

**What:** A structured prompting frame that ensures outputs are consistent and reliable. RISEN stands for **Role, Instructions, Steps, End goal, Narrowing**.

**Why:** In presales for supply chain and global trade, you often need repeatable deliverables, like pilot plans, ROI analyses, or demo scripts. RISEN forces structure and avoids vague or incomplete outputs. It helps new team members quickly align with best practices while giving experienced consultants a blueprint for consistency.

**When:** Use RISEN for recurring presales tasks such as pilot plans, proof-of-concept outlines, discovery frameworks, or customer playbooks.

**Pitfalls:** If the “Narrowing” part is skipped, outputs may become too broad and generic. Always constrain by region, industry, or KPIs to ensure relevance.

**So What:** The RISEN Framework is like a playbook-in-a-box. It standardises how you and your team interact with AI, producing predictable, high-quality assets that reduce prep time and boost customer confidence.

**Pro Tip:** Store RISEN templates by common presales tasks (e.g., objection handling, demo flow, ROI pitch) so anyone on the team can quickly adapt and reuse them.

**Template**:

**R:** Act as [ROLE]

**I:** Produce [ASSET]

**S:** Steps [1..n]

**E:** End goal [OUTCOME/KPI]

**N:** Narrow to [SCOPE/LIMITS]

**Examples**:

* “R: Act as a Value Engineer. I: Build a 6-week pilot plan. S: scoping → data → build → validate → rollout → review. E: prove ≤1.5% false positives. N: EU apparel imports only.”
* “R: Act as a Solution Consultant. I: Create an executive-ready demo script. S: intro → pain → proof → ROI → close. E: highlight automation benefits. N: multinational logistics providers in EU/US.”
* “R: Act as a Trade Compliance Officer. I: Draft a sanctions compliance workflow. S: data collection → screening → escalation → audit trail. E: zero missed matches. N: pharma exports from EU to US.”

### Prompt Chaining (Multi-Step Linked Prompts)

**What:** Break a complex task into smaller linked prompts where each output becomes the input for the next step.

**Why:** Long RFPs, migration plans, and ROI analyses are too big for one prompt. Chaining keeps outputs structured and avoids overwhelm.

**When:** Use when creating layered outputs (e.g., discovery → ROI model → executive brief).

**Pitfalls:** If you don’t review at each step, errors compound. Always validate before moving to the next.

**So What:** Prompt chaining lets you tackle big presales deliverables step by step, producing higher quality and easier-to-digest content.

**Pro Tip:** Save and reuse chains for repeatable workflows (e.g., proof-of-value pilots).

**Template**:

“Step 1: Generate discovery questions. Step 2: Summarise findings. Step 3: Turn findings into ROI. Step 4: Draft executive summary.”

**Examples**:

* “Chain: discovery → business pain bullets → ROI table → 150-word CFO brief.”
* “Chain: HS classification issues → cost analysis → pilot plan → rollout strategy.”

## Multi-Perspective & Creativity (3)

| # | Technique | What it Does | Why it Matters | Best Use Cases |
| --- | --- | --- | --- | --- |
| 4.6.1 | De Bono Six Thinking Hats | Analyses a topic from 6 structured perspectives: facts, feelings, risks, benefits, creativity, and control. | Ensures balanced analysis across stakeholders (CFO, Compliance, Logistics, IT). Reduces blind spots in big decisions. | Pilot planning, stakeholder mapping, executive workshops, and build vs buy decisions. |
| 4.6.2 | Pain Dream Fix | Frames a customer journey as Pain (problem), Dream (future state), Fix (solution with proof). | Turns technical detail into compelling, memorable storytelling that executives repeat internally. | Demo openings, executive briefings, RFP executive summaries, and investment justification. |
| 4.6.3 | Analogical Prompting | Uses analogies from familiar domains to explain complex topics. | Makes abstract SC&GT concepts (ICS2, Incoterms, landed cost) accessible to non-experts. | Executive meetings, workshops, demo intros, training materials. |

### De Bono Six Thinking Hats - Perspective Shifter

**What:** A structured method to analyse a topic from six different perspectives:

* White: facts and data
* Red: feelings and intuition
* Black: risks and downsides
* Yellow: benefits and opportunities
* Green: new ideas and creativity
* Blue: process and control

**Why:** Supply chain and global trade deals often involve diverse stakeholders with conflicting priorities. CFOs care about working capital, Compliance cares about risk, Logistics wants speed, and IT worries about integration. The Six Hats technique forces you to cover all angles, leading to more balanced solutions and fewer blind spots.

**When:** Use during pilot planning, stakeholder mapping, or when preparing executive workshops. It’s especially valuable for framing big decisions like build vs buy, compliance investments, or global rollout strategies.

**Pitfalls:** If you skip hats or rush through them, the analysis becomes unbalanced. Each perspective should have at least 2–3 bullets to ensure depth.

**So What:** Six Hats equips you to anticipate objections, highlight benefits, and uncover hidden risks before the customer raises them. This makes your proposals more robust and credible while showing that you’ve thought through multiple viewpoints.

**Pro Tip:** After completing all hats, summarize with the Blue Hat (control) by stating the decision, next step, owner, and top risk with mitigation. This makes the analysis directly actionable.

**Template**:

“Analyse [TOPIC] using the six hats.

For each hat: max 3 bullets + 1 check question.

Blue hat concludes with decision, next step (owner/date), top risk & mitigation.”

**Examples**:

* “Six Hats on: ‘Run a 6-week pilot for HS classification automation at ACME Retail EU.’”
* “Six Hats on: ‘Adopt a new global trade management platform.’”
* “Six Hats on: ‘Invest in automated denied party screening for 2025 compliance.’”

### Pain‑Dream‑Fix (Storytelling)

**What:** A simple narrative arc that frames the customer’s journey in three parts:

* **Pain**: the current problem or frustration
* **Dream**: the desired future state
* **Fix**: how your solution bridges the gap, with proof

**Why:** In supply chain and global trade presales, storytelling is often more persuasive than technical detail. Executives remember the pain they feel today and the dream you promise, not a feature list. Pain Dream Fix connects emotionally while staying business-relevant.

**When:** Use in demo openings, executive briefings, or RFP executive summaries. It’s especially strong when introducing new solutions or justifying investment.

**Pitfalls:** If the “Fix” is too generic or lacks proof, it sounds like marketing fluff. Always tie the solution to measurable outcomes (fewer delays, reduced duties, faster clearance).

**So What:** Pain Dream Fix transforms a dry product pitch into a compelling story that executives can repeat internally. It helps customers visualize the value and makes your message stick in decision-making meetings.

**Pro Tip:** Keep it short: 2 lines for Pain, 2 lines for Dream, 3 lines for Fix. If you have quantifiable proof (e.g., “cut clearance times by 48 hours”), use it.

**Template**:

“Write a brief story: Pain (2 lines), Dream (2 lines), Fix (3 lines with proof).”

**Examples**:

* Pain: “Customs declarations often require rework, delaying shipments and increasing costs. “Dream: “Imagine clearing goods within 48 hours across EU and US borders with minimal manual effort.” Fix: “By automating data validation and connecting directly to broker APIs, we reduce rework by 30% and accelerate clearance. Customers like ACME Retail now meet delivery SLAs while lowering duty exposure.”
* Pain: “Sanctions screening creates false positives that slow down compliance reviews.” Dream: “Compliance teams could focus only on high-risk cases, not thousands of irrelevant alerts.” Fix: “With AI-driven matching and context enrichment, false positives drop below 1.5%. This saves hundreds of hours per month and improves audit readiness.”

### Analogical Prompting

**What:** Ask the AI to explain or solve a problem using an analogy from another domain.

**Why:** Supply chain and trade topics (e.g., ICS2, Incoterms, landed cost) are often abstract for executives. Analogies make them relatable. For example, “Customs clearance is like airport security: checks, risk profiles, and green/red channels.”

**When:** Use in executive meetings, educational workshops, or demo introductions when you need to simplify complexity.

**Pitfalls:** If the analogy is too simplistic or far-fetched, it can reduce credibility. Stick to familiar, business-relevant comparisons.

**So What:** Analogical prompting helps you explain complex compliance or logistics concepts in plain language that decision makers remember.

**Pro Tip:** Test analogies on a colleague before using them with customers; if they don’t “get it” instantly, pick a sharper one.

**Template**:

“Explain [TOPIC] using an analogy to [FAMILIAR DOMAIN]. Keep it short, business-friendly, and accurate.”

**Examples**:

* “Explain Incoterms like renting a car vs. buying a taxi ride.”
* “Describe ICS2 filings using the analogy of airport check-in and baggage screening.”
* “Compare global trade compliance audits to an annual medical check-up.”

## Meta‑Techniques (4)

| # | Technique | What it Does | Why it Matters (SC&GT) | Best Use Cases |
| --- | --- | --- | --- | --- |
| 4.7.1 | Meta Prompting (Prompt the Prompt) | AI first designs the best possible prompt by asking clarifying questions, then executes the optimised version. | Uncovers missing details (e.g., shipment volumes, compliance regions, KPIs) to avoid vague or weak outputs. | ROI models, executive briefs, tailored demo scripts. |
| 4.7.2 | Prompt Debugging | Critiques your prompt for weaknesses (clarity, missing context, compliance risks), suggests fixes, then reruns. | Prevents generic or misleading content by sharpening prompts for customer-specific, high-stakes deliverables. | RFP responses, compliance briefs, and executive summaries. |
| 4.7.3 | Mixed-Initiative Prompting | Creates outputs through a back-and-forth collaboration: AI proposes, you react, AI refines iteratively. | Mirrors real discovery conversations, enabling richer, tailored outputs for layered presales scenarios. | Pilot plans, ROI models, workshop agendas, scenario brainstorming. |
| 4.7.4 | Human-in-the-Loop (HITL) | AI drafts while a human reviews, edits, and approves each critical step before finalisation. | Balances **speed** (AI draft) with **safety** (human validation) to avoid compliance, ROI, or reputational risks. | RFPs, compliance workflows, ROI models, executive briefings, customer deliverables. |

### Meta-Prompting (Prompt the Prompt)

Link to the Prompt Master: <https://chatgpt.com/g/g-67c4a0acccb48191adbba664a1b24c8a-prompt-master>

**What:** Instead of jumping straight into a task, you first ask the AI to design the best possible prompt. Then, after answering any clarifying questions it asks, you run the optimised prompt for the final output.

**Why:** In presales for supply chain and global trade, you often don’t know the “perfect” way to phrase a request. Meta Prompting helps uncover missing details (e.g., shipment volumes, compliance regions, KPIs) and produces higher quality outputs. It’s like having the AI act as your prompt coach before it becomes your solution consultant.

**When:** Use when tackling complex deliverables like ROI models, executive briefs, or tailored demo scripts where precision and context matter.

**Pitfalls:** If you skip the clarifying step, the AI may still generate generic or incomplete outputs. Always answer the questions before moving on.

**So What:** Meta Prompting raises the baseline quality of everything you produce. It saves time by preventing weak first drafts and ensures outputs are specific to your customer’s context.

**Pro Tip:** Use Meta Prompting when you’re stuck or feel your requests are too vague. It’s a great way to “unlock” better AI performance without guesswork.

**Template**:

“Design the optimal prompt for [TASK] with missing questions listed. After I answer, execute to produce [OUTPUT].”

**Examples**:

* “Create the optimal prompt to produce a CFO-ready ROI brief on duty savings; ask for any missing inputs (volumes, rates, timeframes).”
* “Design the best prompt for a discovery workshop agenda with a Head of Logistics; clarify assumptions about region, shipment volumes, and IT systems. Then generate the agenda.”
* “Draft the optimal prompt to create an executive demo script on ICS2 compliance. Identify missing context (industry, regions, proof points), then build the final script.”

### Prompt Debugging

**What:** Instead of accepting a weak or vague prompt, you ask the AI to critique it first. The AI identifies what’s ambiguous, incomplete, or risky, then suggests improvements. After reviewing the feedback, you refine the prompt and re-run it for a stronger final output.

**Why:** In presales for supply chain and global trade, prompts often miss key details (e.g., compliance scope, integration depth, ROI metrics). If you skip debugging, the AI may produce generic or even misleading content. Debugging ensures precision, credibility, and customer relevance, critical in regulated contexts.

**When:** Use when a prompt feels too broad, outputs look generic, or stakes are high (RFP responses, compliance briefs, executive summaries). It’s especially useful before customer-facing deliverables.

**Pitfalls:** If the critique step is shallow (“make it better”), improvements will be minor. Push the AI to flag at least 2–3 concrete issues (clarity, missing data, tone).

**So What:** Prompt Debugging prevents wasted cycles. It helps you refine vague inputs into sharp, customer-specific prompts that yield higher quality outputs. Over time, this raises the consistency and credibility of all presales work.

**Pro Tip:** Always run a quick debug pass if an output feels “off.” Often, a 30-second critique saves hours of rework.

**Template**:

“Critique this prompt: [INSERT PROMPT]. List 3 weaknesses (clarity, completeness, compliance). Suggest an improved version. Then execute the improved prompt.”

**Examples**:

* “Critique this prompt: ‘Write an RFP answer on ICS2 compliance.’ Flag what’s missing, suggest improvements, then generate the improved answer.”
* “Debug this demo script prompt: ‘Show benefits of duty optimisation.’ Identify gaps (persona, KPIs, tone), refine it, then create the script.”
* “Refine this objection handling prompt: ‘We already have Competitor X.’ Point out weaknesses, propose an improved neutral-compliance-focused version, then draft it.”

### Mixed-Initiative Prompting

**What:** A back-and-forth collaboration where you and the AI take turns driving. Instead of giving one long instruction, you let the AI propose ideas, you react, and the AI refines. It’s a conversational co-creation process rather than a single-shot request.

**Why:** In presales for supply chain and global trade, you rarely know the complete answer upfront. Customers ask layered questions about compliance, ROI, or integration. Mixed-Initiative Prompting allows you to shape the direction step by step, while the AI adapts in real time, closer to how real discovery conversations unfold.

**When:** Use when exploring options (ROI models, pilot plans, workshop agendas) or when you want to balance AI creativity with your expertise. Perfect for brainstorming customer scenarios or building deliverables that need multiple iterations.

**Pitfalls:** If you don’t guide the iterations, the AI may wander off-topic or repeat itself. Always confirm or redirect after each round. Think of it like steering a conversation. You need to keep momentum and focus.

**So What:** Mixed-Initiative Prompting makes the AI feel like a sparring partner. It helps you uncover blind spots, generate richer options, and refine outputs interactively, leading to more tailored, customer-ready assets.

**Pro Tip:** Start broad (“Draft 3 pilot angles for EU customs automation”) then narrow with each iteration. Use short steering feedback like “expand option 2 with ROI data” or “make option 3 executive-ready.”

**Template**:

“Let’s collaborate. First, draft [X OPTIONS] for [TOPIC]. I’ll select/refine, then you expand or adjust. Continue until we finalise a customer-ready version.”

**Examples**:

* “Draft 3 workshop agendas for a Trade Compliance persona. I’ll pick one, then refine together step by step.”
* “Propose 3 ROI storylines for duty optimisation. After my feedback, expand one into a CFO-ready brief.”
* “Generate 2 demo narratives for ICS2 compliance. I’ll select, then you refine with industry proof points.”

### Human-in-the-Loop (HITL)

**What:** A prompting style where the AI produces drafts, options, or calculations, but a human reviews, edits, or approves each critical step before moving forward. The “loop” ensures human judgment remains in control, especially for compliance or executive-facing outputs.

**Why (SC&GT):** In supply chain and global trade, mistakes in compliance text, duty savings models, or security answers can lead to fines, delays, or lost deals. HITL ensures that AI accelerates the heavy lifting but humans validate accuracy, tone, and customer fit, protecting credibility.

**When:** Use for RFP responses, compliance workflows, ROI models, executive briefings, or any deliverable where errors carry high risk. Ideal when outputs may go directly to customers or regulators.

**Pitfalls:** If you skip the human review or treat the draft as final, you risk pushing out inaccurate or misleading content. On the other hand, too much human intervention can slow down the process. Find the balance.

**So What (Value):** HITL gives you both **speed** (AI drafts quickly) and **safety** (a human ensures correctness). This balance builds trust internally and externally. Customers see rigour, and your team avoids reputational risks.

**Pro Tip:** Use a clear review protocol: AI drafts → human validates facts, tone, compliance → AI revises with feedback. This keeps outputs structured and reduces rework.

**Template**:

“Step 1: AI drafts [OUTPUT]. Step 2: Human reviews and flags issues (compliance, ROI proof, tone). Step 3: AI revises with corrections. Final version is human-approved.”

**Examples**:

* “Draft an RFP section on data residency. Human reviews compliance details, AI revises, final is customer-ready.”
* “AI builds a duty savings ROI model. Human validates duty rates and shipment volumes, AI recalculates, final numbers approved.”
* “Create an executive demo script. Human adjusts tone and industry relevance, AI rewrites, final version is board-level ready.”

## Hallucination of Models and how to avoid them

**What**: Hallucination happens when AI models generate information that sounds confident and convincing but is factually wrong or unsupported. In presales, this can be dangerous, as clients may receive incorrect data points, compliance claims, or ROI figures that harm your credibility.

**Why it Matters:** Presales relies on trust. A single false statement about trade regulations, system capabilities, or financial benefits can damage confidence and stall the deal. Since large language models are designed to predict words rather than guarantee accuracy, hallucinations are a known risk that every Solution Consultant must manage.

**When**: Hallucinations are most likely to appear when:

* Asking about very recent or niche information not in the model’s training data
* Using vague prompts that leave too much room for the model to “fill in” gaps
* Requesting numbers, laws, or technical details without providing sources
* Over-relying on AI for compliance, security, or financial accuracy without verification

**Pitfalls**: Treating AI responses as facts without validation can lead to misleading statements in front of executives or regulators. Even when a response sounds polished, it may be entirely fabricated.

**So What**: Understanding hallucinations prepares you to treat AI as an assistant, not an oracle. By recognising the risk and applying safeguards, you can turn AI into a reliable partner instead of a liability.

**Pro Tips to Avoid Hallucinations**:

* Use **verification techniques** (e.g., Chain of Verification, RAG, Self-RAG) to check outputs
* Provide **context and source material** upfront so the model grounds its response
* Ask for assumptions and confidence levels in the output
* Always **fact-check numbers and compliance details** against trusted sources before sharing with clients

**Template**:

“Draft an answer to [QUESTION]. Then provide 3 assumptions behind it. Flag any gaps where external validation is required. If information is missing, say ‘insufficient data’ rather than inventing.”

**Example**:

* Weak Prompt: “What are the duty rates for importing electronics into the EU?”

→ Risk: AI may invent outdated or incorrect rates.

* Strong Prompt: “Using the official EU tariff schedule (attached), summarise duty rates for electronics imports into Germany. If data is missing, say ‘insufficient data’.”

# Tool Selection Guide by Task Type

Not every AI tool is equally suited for every presales task. The key is knowing which assistant to use for which activity. This section provides a guide on **matching tools to common Solution Consulting scenarios** in global trade and supply chain.

For each task, you will find:

* The most effective tool(s) to use and why they fit best
* Practical examples of how to apply them
* Example prompt workflows you can adapt to your own client situations

By selecting the right tool for the job, you avoid generic outputs and get results that are faster, more reliable, and more relevant to your buyer’s needs.

## PreSales & Prompting Agent

### PreSales Handbook GPT

Before diving into the frameworks, templates, and techniques that shape modern presales excellence, it is essential to understand how this AI assistant operates.

PreSales Handbook GPT is more than just a chatbot answering questions. It acts as a **strategic system**, trained on a curated library of proven resources. These include:

* The PreSales Handbook by Dr. Johannes Hangl
* Battle-tested discovery and demo templates
* Qualification frameworks such as BANT, CHAMP, and MEDDIC
* Real-world scripts and best practices used by top-performing Solution Consultants

By combining this knowledge with prompting techniques, PreSales Handbook GPT can provide structured, context-aware outputs that mirror how an experienced consultant prepares and communicates.

Link: <https://chatgpt.com/g/g-67bd6ea667c08191a7a59358d0cb4744-the-presales-handbook>

#### Real-Time Context Awareness

When you ask the AI about demo preparation, opportunity qualification, or proof-of-concept design, it does not create answers out of thin air. Instead, it references your question against a **structured knowledge base** built from resources you provide. These may include:

* Discovery templates and question banks
* Demo planning frameworks
* ROI and business case builders
* Opportunity scoping documents
* Communication and objection handling scripts
* Other presales best practices and assets

Each input is then interpreted through the lens of **presales methodology**, combining your materials with the core principles from trusted sources such as the PreSales Handbook and established qualification frameworks.

This ensures that outputs are not just generic AI responses, but tailored guidance aligned with both your team’s assets and proven industry practices.

#### Purpose-Built for PreSales

The PreSales Handbook GPT is designed specifically for the **PreSales function**, setting it apart from general-purpose AI tools. Each inquiry is organised along the essential stages of the presales lifecycle, such as:

* Sales Discovery
* Functional and Technical Discovery
* Demo Execution
* …

It then provides **structured, relevant guidance** for each stage, ensuring clarity and immediate usability.

The assistant also asks **refining questions** before delivering outputs, so you receive the right framework at the right moment. For example, before outlining a discovery plan, it may ask:  
“Is this Sales Discovery, Functional/Technical Discovery, or Services Discovery?”

This approach ensures that every response is aligned with presales best practices and applied with the appropriate level of detail at the critical stage of the cycle.

#### What’s Happening Under the Hood

Under the surface, this AI:

* Indexed and mapped the structure of all your PreSales documents
* Parsed templates, checklists, and talking points into an internal playbook
* Learned how to apply PreSales best practices in real-world scenarios
* Surfaces the most relevant material instantly, without you needing to search

It’s a bit like having your entire PreSales library whispering in your ear, structured, filtered, and translated into the language of action.

## Prompt Master

A vague prompt and a precise prompt can produce dramatically different results. In AI collaboration, the difference between noise and breakthrough often comes down to how well you frame the request. **Prompt Master** is designed to help you create impactful, structured prompts that consistently deliver strong outcomes from tools like ChatGPT.

Link: <https://chatgpt.com/g/g-67c4a0acccb48191adbba664a1b24c8a-prompt-master>

1. Step-by-Step Process
2. **Understand Your Goal (User Intent):** Identify what you want to achieve with your AI prompt: text generation, data analysis, code writing, image creation, or something else.
3. **Clarify and Refine:** Ask follow-up questions to narrow and specify your request, making it more actionable. Clear intent leads to better outputs.
4. **Generate a High-Quality Prompt:** Rewrite your idea into a structured, detailed prompt tailored to your AI tool. This may include:
   * Assigning a role or persona (“Act as a Trade Compliance Officer”)
   * Defining tasks clearly (“Compare these two workflows”)
   * Adding context and constraints (\*“Focus on EU regulations from 2023” or “Output as a table”)
5. **Suggest Enhancements:** Propose improvements such as specifying output format, addressing edge cases, or adding domain-specific context.
6. **Iterate With You:** Refine prompts in cycles, checking if the output meets expectations and adjusting until it does.
7. **Apply Advanced Prompting Techniques:**Behind the scenes, leverage methods like:
   * Chain-of-thought reasoning
   * Multi-agent simulation
   * Structured formatting (Markdown, tables, JSON)
   * Temperature/top-p control
   * Expert persona modeling

## Discovery Sessions

### ****Overview****

**Best tool(s):** Perplexity (for research) and ChatGPT/Copilot /Claude (for brainstorming questions and summaries).

**Why:** The discovery phase requires you to quickly familiarise yourself with the client’s industry and prepare insightful questions. Each tool plays a specific role:

* **Perplexity** is ideal for **real-time research**. It can retrieve the latest news on a client’s supply chain, pull statistics on industry challenges, and provide cited sources you can trust.
* **ChatGPT/Copilot** helps with **brainstorming and scenario planning**. It can generate a wide range of discovery questions and anticipate possible client responses.
* **Claude** excels at **processing lengthy documents**, such as annual reports or client questionnaires, highlighting key insights and risks that should inform your discovery plan.

By combining these tools, you ensure that you walk into the discovery meeting both informed and prepared, with questions that are relevant, strategic, and tailored to the client’s context.

### ****Example Prompt Workflow****

#### ****Pre-research with Perplexity****

Before the discovery call, ask Perplexity questions to gather intel.

For example: “What are the current supply chain challenges in the automotive sector?” Perplexity will return a brief answer with sources (e.g. noting trends like semiconductor shortages or new customs regulations with reference links). You might follow up with “Any recent regulatory changes in EU import/export for automotive parts?” to get specifics, complete with citations you can read. This quickly grounds you in facts you can mention or ask about.

#### ****Question brainstorming with ChatGPT/Copilot****

Once you have background knowledge from research, use **ChatGPT/Copilot** to generate **tailored discovery questions**. Always provide context about **who you are meeting** and **what you are selling**, and ask for **categorised questions**.

Example Prompt

“I am a Solution Consultant for a global trade management software. I have a discovery meeting with the VP of Supply Chain at Acme Corp, a mid-sized electronics manufacturer. I want to understand their current processes (current state), their ideal improvements (future state), and how they measure success. Suggest specific, non-generic questions for each of those areas.”

This works because the prompt gives ChatGPT/Copilot both a **role** and a **clear goal**, following a structure often used in sales discovery frameworks.

Example Output

* **Current State**: “How are you handling customs documentation and tariff classification today, and what pain points do you experience?”
* **Future State**: “If you could automate or improve any part of your trade compliance process, what would the ideal scenario look like?”
* **Success Metrics**: “How do you evaluate the efficiency of your supply chain or compliance operations (e.g., clearance times, penalties avoided)?”

From there, you can **iterate** by asking ChatGPT/Copilot to refine, expand, or suggest follow-up questions. This ensures your discovery session is structured, relevant, and client-specific rather than generic.

Weak vs Strong Prompt Example

* **Weak Prompt** “Give me discovery questions for supply chain.”

→ Likely output: generic questions such as “What are your biggest challenges in supply chain?” or “How do you handle logistics?”

* **Strong Prompt** “I am a Solution Consultant for a global trade management software. I am meeting the VP of Supply Chain at a mid-sized electronics manufacturer. Create discovery questions in three categories: current processes, future improvements, and success metrics.”

→ Output: tailored, specific, and role-aligned questions that can be used directly in client meetings.

#### ****Post-call summary with Claude****

After a discovery session, you can use **Claude** to process meeting notes or a transcript and generate a structured summary of the client’s needs. Thanks to its large context window, Claude can handle lengthy transcripts and still produce a clear recap, such as:

* Client’s stated challenges
* Objectives they want to achieve
* Specific requirements mentioned

For any factual details that need validation (e.g., a regulation referenced by the client), you can cross-check with **Perplexity** to confirm accuracy.

Using AI in this way ensures that you capture both the questions asked and the insights shared. It is like having an analyst and note-taker working alongside you, so you can focus fully on listening and advising during the live conversation.

### Extensive Prompt for Pre-Discovery Research

#### Initial Prompt

Initial Instructions:

"Act as a senior Global Trade Management expert representing [My Company Name]. Your mission is to support prospective clients with high-value insights, not to sell. Offer advice in a consultative tone. You specialise in supply chain visibility, customs compliance, and automation across regulated industries. Before proceeding, confirm your understanding of this role and approach. ”

(Wait for the AI to confirm understanding, then proceed.)

**Tip:** Always wait for the AI to confirm its understanding before moving forward. This ensures that the assistant has adopted the correct role and mindset, setting the stage for credible and consultative outputs.

### ****2nd Prompt****

**Objective**

I am conducting research on **{{Company Name}}**, a company in the **{{Industry Type}}** industry, to prepare **Sales Leaders** for a value-based, insight-driven conversation. Your analysis will help us position {{Your Company Name}}, as a **strategic partner in Global Trade and Compliance optimisation**.

**Timeframe Focus:** 2022 to Present

**Output Format:** Bullet points, concise paragraphs, links to sources

**Include:** Financial filings, news coverage, press releases, official reports

**If data is unavailable**, provide logical inferences based on industry benchmarks

Executive Summary (Top-Level View)

Provide a concise 6–10 bullet overview of the most relevant insights across financials, leadership, trade strategy, and pain points. Include 1–2 bullets each on:

Financial health

Recent news or strategic moves

Trade management approach

Risks or challenges

Leadership and direction

SWOT Analysis

Summarize based on your full findings. Use bullet points under each category.

**Strengths**

**Weaknesses**

**Opportunities**

**Threats**

Section 1: Company Background & Financials

A. Financial Overview (2022–Present)

* Latest balance sheet, income statement, and cash flow (with links)
* Benchmark key figures vs. industry
* Key financial ratios (ROA, ROE, D/E, etc.)
* Recent M&A, restructuring, or capital shifts
* Investments in global trade infrastructure
* Financial risks and opportunities from official reports

B. News & Market Activity

* Summarize key press releases or news events
* Any controversies or compliance/legal issues
* Product launches, expansions, or shifts
* Adoption of global trade trends (e.g., ESG, digitalization)
* Response to macro disruptions (e.g., war, pandemic, trade wars)

C. Key Leadership & Decision-Makers

* Names and titles of top executives
* CEO background and leadership style
* Global Trade-specific leaders or directors
* Public interviews or statements on strategy
* Expertise and background of trade leadership

D. Company Evolution & Milestones

* Brief history and major milestones
* Awards and recognitions in last 10 years
* Evolution of products, services, and market presence
* Evolution of global trade strategy
* Key tech or process innovations in trade

Section 2: Global Trade Strategy & Capabilities

A. Current Global Trade Initiatives

* Ongoing strategies and transformation programs
* Approach to geopolitical, economic, or regulatory disruption
* KPIs used for success tracking
* Use of AI, ML, or analytics in trade optimization

B. Future Trade Strategy

* Planned global trade or logistics initiatives
* Tech-forward vision: cloud, API, integration, platform consolidation
* ESG, digital documentation, or green shipping initiatives
* Plans for blockchain, IoT, or predictive risk tools

C. Trade Risks & Gaps

* Key global trade management challenges post-COVID
* Past or ongoing regulatory fines or issues
* Media-covered operational failures or compliance gaps
* Operational or digital blind spots in trade compliance
* Mitigation strategies in place (policy, tools, training)

D. Technology & Software Stack

* List of current software vendors used for GTM
* Integration level with broader supply chain tech
* Strengths and limitations of current platforms
* Internal or external ROI analysis approaches

Section 3: Customs Filing & Compliance Workflows

A. Core Trade Compliance Practices

* Current management of cross-border customs and documentation
* Most relevant regulations/agreements by region

B. Technology Use in Compliance

* Software systems in use for filing automation
* Integration level with TMS/WMS/ERP systems

C. Risk & Regulatory Exposure

* Key risks tied to compliance failure or data gaps
* Fine/delay prevention strategies

D. Tariffs & Cost Control

* Tariff engineering, classification, and duty optimization
* FTA utilization, bonded warehouses, or other cost-saving tactics

E. Product Classification Accuracy

* HS code and ECCN classification processes
* Frequency and depth of audit/review

F. Training & SOPs

* Training cadence and content for staff
* Documented SOPs for customs and exceptions

G. Forward-Looking Capabilities

* Planned adoption of AI, blockchain, or e-invoicing tools
* Digital trade lane or real-time compliance strategy

H. Performance Metrics

* Compliance KPIs tracked
* Internal trends and areas flagged for improvement

Final Instructions

* Use a **neutral, expert tone**
* Organize responses clearly with **headings, bullets, or tables**
* Prioritize **source-based responses**; infer only where necessary
* Provide **hyperlinks to 10-Ks, investor reports, or reliable articles** where possible

## Demo Workshops

### ****Overview****

Best Tools

* **ChatGPT / Copilot**, Persona-driven storytelling, scripting dialogues, and role-play scenarios
* **Claude**, Structuring long demo scripts and grouping complex requirements
* **Perplexity**, Validating data points and retrieving real-world statistics or references

Why:

Modern presales demos are no longer simple product walkthroughs. They are immersive, persona-centric narratives that highlight outcomes rather than features. By integrating AI tools into demo design, you can transform a session into an engaging, buyer-specific story that builds trust.

* **ChatGPT / Copilot** helps craft compelling demo narratives such as “A Day in the Life” for each persona, simulate objections, and script realistic dialogues between decision-makers (e.g., VP of Supply Chain, IT Security Officer).
* **Claude** takes the requirements captured in your Opportunity Scoping Document (OSD) and organises them into clear demo tracks (e.g., “Data Visibility”, “Compliance Automation”, “Order Accuracy”).
* **Perplexity** adds credibility by providing real-world statistics (e.g., “Digitising documentation reduced customs clearance delays by 40% according to [source]”) that strengthen your value narrative.

Together, these tools elevate demos from passive product tours into active, outcome-driven experiences that resonate with each stakeholder.

### ****Example Prompt Workflow for AI-Enhanced Demo Preparation****

#### ****Step 1: Storyboarding the Narrative with ChatGPT or Copilot****

Prompt:

“Create a persona-driven demo story for a logistics manager experiencing delays due to missing customs documentation. Demonstrate how our platform resolves the issue, with a beginning (problem), middle (solution), and end (impact).”

Example Output:

“Jane, a logistics manager at ACME Corp, realizes a critical shipment is delayed at the border due to missing export documentation. Using our Global Trade dashboard, she triggers an AI compliance check and accesses pre-filled trade forms. With digital submission, she clears customs in hours preventing a costly stockout.”

💡**Pro Tip**: Use **persona-based Selling** from the PreSales Master Demo Deck and map to each persona identified in the **OSD**, such as “Jane, Logistics,” “Raj, IT Security,” “Laura, CFO.”

#### ****Step 2: Dialogue and Objection Handling with ChatGPT****

Prompt:

“Write a dialogue where the logistics manager reports to the VP Supply Chain on the delay, then later presents how our solution helped resolve it. Also, simulate skeptical CFO questions about ROI.”

Output:

* Jane to VP: “We were on the verge of a $250K penalty. The AI assistant flagged missing docs and enabled real-time submission, so we avoided the fee and protected the shipment.”
* CFO (objection): “Sounds promising, but what quantifiable savings can we expect long-term?”

**Use ChatGPT to pre-build these narratives** and inject them naturally into your demo, ensuring objection-preparedness.

#### ****Step 3: Structuring Complex Requirements with Claude****

Prompt:

“Here’s a list of 20 client requirements from the OSD. Create a 90-minute demo agenda, grouping features thematically and assigning them to relevant personas or presenters.”

Example Output:

* **Segment 1: Visibility & Planning (30 min)**, Inventory Forecasting, Real-time Order Tracking
* **Segment 2: Compliance & Risk (25 min)**, Trade Document Automation, HS Code Validation
* **Segment 3: Analytics & Impact (20 min)**, KPI Dashboards, Predictive Analytics
* **Wrap-Up & Q&A (15 min)**, Executive Summary for VP, CFO, and Procurement

💡Tie each segment to a buyer persona and relate it back to goals and challenges outlined in the OSD.

#### ****Step 4: Adding Data Validation via Perplexity (Optional)****

Prompt:

“Find a real-world stat on how trade documentation errors impact shipment delays or costs.”

Example Output:

“According to McKinsey, automation of export documentation reduces customs delays by 30-50%.”, Now you have a **source-backed claim** to enhance demo credibility.

### ****Key Takeaway: Demo = Tailored Story + Verified Impact + Persona Empathy****

By integrating **AI tools**, **OSD insights**, and **persona-based storytelling**, your demo becomes a **workshop**, not a pitch, that guides the buyer through a personalized journey of “Here’s how your life improves with us.”

Use these tools intentionally to:

* Stay aligned with real client challenges and metrics (OSD-aligned)
* Speak the buyer’s language (persona lens)
* Provide a confident narrative structure and avoid demo fatigue

## Solution Design

### ****Overview****

**Best tools:** Claude (for analysing long inputs and generating structured solutions) and ChatGPT/Copilot (for quick ideation and document drafting)

Why:

Solution design requires digesting large volumes of information such as requirements documents, process flows, and technical constraints, and then synthesising a clear, coherent approach.

* **Claude** is especially valuable because of its large context window. You can provide entire specification documents or integration guides, and it can generate summaries, highlight pain points, or point out mismatches with standard solution capabilities. For example, when designing a global trade management solution, you could input a detailed description of a client’s import-export process, and Claude would identify gaps or inefficiencies compared to best practices. Claude also produces naturally structured outputs in the form of bullet points or step-by-step plans, which makes it well suited for system architectures, solution blueprints, or implementation roadmaps.
* **ChatGPT/Copilot** complements this by supporting quick ideation and drafting. It is excellent for brainstorming ideas in a smaller scope (e.g., “List five possible ways to integrate system X with system Y”) and for polishing the language of design documents, proposals, or executive summaries.

Together, these tools help Solution Consultants move from raw client input to a well-organised and persuasive solution design faster and with greater clarity.

### ****Example Prompt Workflow****

#### ****Requirement analysis with Claude****

Imagine you have a 30-page RFP or a requirements spreadsheet for a supply chain system. Instead of reading it end-to-end in one go, you can paste large sections into Claude and ask it to analyze.

For example: “Given the requirements above, identify the key solution components needed (e.g. Order Management, Customs Compliance module, Reporting). Provide a brief rationale for each component mapping to the requirement.”

Claude can ingest the entire set and output a structured breakdown:

“1. **Global Trade Compliance Module**, Rationale: requirements A12, B4, C7 call for automated classification, embargo checks… 2. **Supply Chain Visibility Dashboard**, Rationale: requirements D3, D4 emphasize real-time tracking…,” and so on.

This helps ensure **coverage**; you’re less likely to overlook a requirement because Claude will systematically go through them (so long as they were in the prompt).

#### ****Brainstorm solutions with ChatGPT/Copilot****

For more open-ended design thinking, use ChatGPT/Copilot.

For instance: “Our client is struggling with frequent shipment delays due to manual paperwork errors. Brainstorm several solution approaches using technology (process changes, integrations, AI tools) to reduce errors and delays.”

ChatGPT/Copilot might generate ideas like “Implement a document management system with OCR to auto-verify trade documents,” or “Integrate a partner portal for suppliers to input data directly, reducing manual re-entry mistakes,” etc.

You can then ask it to expand on one of the ideas or compare the pros/cons. ChatGPT/Copilot’s strength in free-form **ideation** can spark creative solutions you might include in your design. (Always cross-check feasibility, of course, but it’s a great starting point for options.)

#### ****Document drafting with ChatGPT/Copilot****

Once the solution approach is decided, ChatGPT/Copilot can also help in writing drafts for design documents or proposal sections.

Prompt it with an outline: “Write a section of a solution design document that describes the ‘Future State Solution Architecture’ for the client, including a diagram description. Emphasize how the new system will handle order processing, customs compliance, and logistics coordination, referencing the components we plan to implement.”

Because ChatGPT/Copilot writes in a very fluent, narrative style, it can produce a reader-friendly paragraph that you can then edit for accuracy. This can save time overcoming “blank page syndrome.”

#### ****Q&A or validation with Claude****

You can even use Claude to sanity-check the solution.

For example: “Based on the requirements and proposed design (summarized above), do you foresee any gaps or risks? List any potential compliance or integration challenges.”

Claude might point out, for instance, that the design didn’t mention a solution for **denied party screening** (if that was in requirements), alerting you to address it. This kind of **AI double-check** is like having a second pair of eyes on your design, which can be very valuable.

In solution design, thoroughness and clarity are key. Claude helps ensure you cover the details and rationale (digesting large inputs, giving structured outputs), while ChatGPT/Copilot assists in the creative and communicative aspects (generating ideas and text). Together they act as a solution design assistant, analyzing, creating, and verifying alongside you.

## Business Analysis

### ****Overview****

**Best tools:** ChatGPT/Copilot (for insights, summaries, and calculations on smaller data sets), Claude (for processing large reports), and Perplexity (for benchmarking and external data).

**Why:**  
Business analysis in global trade and supply chain often means examining process performance, conducting cost-benefit studies, or assessing KPI reports. In many cases, the challenge is not the data itself but how to interpret it and turn it into actionable insights.

* **ChatGPT/Copilot** is useful for smaller inputs. For example, you can provide a set of KPIs or a short dataset and ask it to explain trends or write a narrative interpretation, such as “What does this drop in on-time delivery suggest?”
* **Claude** excels when the input is much larger. If you have a 50-page logistics performance report, Claude can read it in full, summarise the key findings, and answer targeted questions about it.
* **Perplexity** adds value when external benchmarks or industry context are needed. For instance, you can ask “What is the industry average on-time delivery rate in retail?” and receive a sourced answer that you can use for comparison.

By combining these tools, Solution Consultants can move quickly from raw reports to structured, credible insights that support business cases and client conversations.

### ****Example Prompt Workflow****

#### ****Summarize and interpret with Claude****

Suppose you have a text export of a BI report on supply chain KPIs (on-time delivery, forecast accuracy, etc.) which is several pages long.

You can feed that text into Claude and ask: “Summarize the key performance issues identified in this report and suggest possible causes for each.”

Claude will parse through and might respond: “On-time delivery is 85% (industry benchmark ~92%), indicating a lag, possible causes: customs delays or carrier issues. Inventory turnover is low (X times/year vs ideal Y), indicating overstock, possible cause: demand forecast inaccuracy or buffer stock strategy,” and so on. This gives you a quick analytic view, which you can refine by asking follow-ups (e.g. “Which areas improved vs last year?”).

Essentially, Claude helps digest lengthy analysis for you, highlighting insights and even pointing to root causes by synthesizing the text.

#### ****Drilling down with ChatGPT/Copilot****

For targeted analysis on smaller data sets or calculations, ChatGPT/Copilot can help. If you have a table of figures or a short list of numbers, you can paste it and ask ChatGPT/Copilot to calculate something or identify patterns.

For example: “Here are cycle times for Q1 and Q2: [list of values]. Has there been an improvement, and what’s the percentage change?”

ChatGPT/Copilot can do the math and respond in a friendly way: “Yes, the average cycle time decreased from 5.0 days to 4.5 days, which is a 10% improvement.” (Always double-check the math, but it usually handles basic calculations correctly.) Then you might ask, “What might explain this improvement?” If you also gave context (say, “we implemented a new scheduling system in Q2”), ChatGPT/Copilot can connect the dots in its explanation. Essentially, it can act as a junior analyst writing up the findings for you.

#### ****Benchmarking with Perplexity****

If your analysis requires comparing against outside data, use Perplexity to fetch that.

For instance, “average customs clearance time in [country]” or “typical supply chain cost as % of sales in electronics industry.”

Perplexity will return a factual answer with a source (e.g., “Typically ~7% of sales” or “Customs clearance ~48 hours on average per World Bank”).

You can then incorporate these into your analysis report to strengthen it: “Our clearance time is 72 hours, vs ~48-hour industry average, indicating room for improvement.” The citation ensures you have credible backing.

#### ****Drafting recommendations with ChatGPT/Copilot****

Finally, for the **business recommendation** part, prompt ChatGPT/Copilot to draft suggestions based on the analysis.

For example: “Given the issues identified (delivery delays, high inventory), draft 3 recommended initiatives to improve, with justification.”

Since ChatGPT/Copilot can synthesize context well, it might output recommendations like “Implement an advanced forecasting tool to improve inventory turns, this can reduce excess stock and increase turnover” or “Partner with a 3PL for faster customs brokerage to raise on-time delivery closer to 95%.” These are ideas you likely know, but the AI helps frame them succinctly. You then polish and validate feasibility.

By combining these tools, business analysis becomes faster and richer. They assist in crunching the information and even generating initial recommendations or reports. Of course, human judgment is needed to validate and decide on the final actions, but AI gives you a strong head start, analyzing data narratives, comparing with external benchmarks, and suggesting improvements. It’s like having an analyst that can instantly read every report and an encyclopedia that quickly gives you industry context.

# Prompting Best Practices

How you prompt decides what you get. Use these tips to get outputs that are relevant, accurate, and ready for client use. The first part covers general tips. Later parts show tool-specific moves.

### General Prompting Tips

Be clear and specific:

Say exactly what you need and for whom.

Weak: “Summarize this report.”

Strong: “You are a supply chain analyst. Summarize the warehouse report for a COO. Focus on bottlenecks and quantitative trends. Limit to 120 words, 5 bullets.”

Provide context

Brief background improves answers. Add industry, region, systems, KPIs, or constraints.

Tip: Context often beats clever wording. Give the model the scene it is stepping into.

Define a role or persona

Set the voice and lens.

Example: “Act as a trade compliance officer. Explain export control classification to a non-technical audience.”

Specify output format

Tell it how to present the result.

Examples: “3 bullets,” “table with columns: Risk, Likelihood, Impact, Mitigation,” “executive email draft.”

Ask open questions

Invite explanations, not yes/no.

Example: “Why is managing supplier risk critical in this process, and where do failures usually start?”

Show a sample to mimic

Give a short example to copy style or structure.

Example: “Use this tone: ‘Team, we achieved a 5% faster throughput this week…’ Now write the new update in the same tone.”

State boundaries

Say what to include and exclude, and set limits.

Example: “Include duties, VAT, freight surcharges. Exclude marketing language. Max 150 words.”

Iterate and refine

Treat it like a dialogue. Ask for improvements.

Examples: “Good start. Add a section on ROI.” “Rewrite for a CFO in plain English.” “Suggest 3 follow-ups for each question.”

Verify important facts

AI can hallucinate. Double-check numbers, laws, and product claims against trusted sources. Use citations when possible. Rephrase or simplify if answers look suspicious.

Protect confidentiality

Do not paste sensitive client data into public tools. Remove names, IDs, and any private details or use a secure environment.

### Tool-Specific Prompting Techniques

While the general rules apply to all tools, each has its own style and strengths. Adjust your prompting approach depending on whether you use **Perplexity**, **ChatGPT/Copilot**, or **Claude**.

Perplexity (AI Search Engine)

Think of Perplexity like a supercharged Google. It works best with precise queries and returns short, sourced answers.

* Use direct questions with names, dates, or terms.

Example: “2024 EU customs regulation carbon border tax”

* Ask for lists or comparisons.

Example: “List the top 3 trends in supply chain risk management in 2023.”

* Use it to get quotable material with a source.

Example: “Find a quote from an industry report about AI in supply chain.”

* If your query is too broad, Perplexity may return “no clear answer.” Break the request into smaller parts.

**When to use:** Fact-checking, up-to-date research, external benchmarks.  
**Watch out for:** Limited creativity and depth. It is designed for factual precision, not storytelling.

ChatGPT/Copilot (All-rounder)

ChatGPT/Copilot is best used like a collaborative colleague. It thrives on conversation and context.

* Start broad, then narrow down with follow-up prompts.

Example: “Outline a solution for X” → “Expand on point 2.”

* Set the role or persona upfront.

Example: “You are a senior supply chain consultant. Draft a discovery plan.”

* Ask for the output format.

Example: “Present this as a table comparing option A and option B.”

* Use step-by-step instructions for complex tasks.

Example: “First list the steps you will take to answer this. Then provide the answer.”

* Adapt tone as needed.

Example: “Write in a formal style for a board memo.

**When to use:** Drafting, brainstorming, refining ideas, adapting tone.

**Watch out for:** Hallucinated facts or invented sources. Use Perplexity for real citations.

Claude (Large-context analyst)

Claude is excellent when you need to process large amounts of text or want highly structured outputs.

* Feed it long documents in one go (e.g. SOPs, contracts, reports).
* Use clear sections in prompts, such as “Background:” and “Task:”.
* Claude often structures answers into steps or bullets by default. If you want a more conversational style, say so.
* Good at multi-step tasks.

Example: “Read the following text. First, list the key issues. Then suggest a solution for each.”

* It is more cautious with sensitive topics, so frame questions as general or hypothetical if needed.

**When to use:** Analyzing long documents, building structured outputs, multi-part instructions.

**Watch out for:** Conservative answers and knowledge cutoff (no live internet). Double-check critical points.

# Prompt Templates for PreSales

Over time, it is useful to build a set of reusable prompt structures (“prompt patterns”) that you can quickly adapt for common tasks. Below are some templates tailored to global trade and supply chain consulting.

## Analysis / Summary Template

**Prompt:** “You are a {role} analyzing {document/process}. Summarize the key {findings/issues} and {recommendations} in a structured format.”

**Example:** “You are an operations analyst analyzing the monthly inventory report. Summarize the key stockout issues and recommendations.”

👉 This works well for fast, structured analysis with clear outputs.

## Brainstorm / Ideation Template

**Prompt:** “Act as a {expert type}. We are facing {problem statement}. Brainstorm a list of {ideas/solutions} to address this, considering {constraints or goals}.”

**Example:** “Act as a supply chain innovation expert. We face frequent stockouts in regional warehouses. Brainstorm 5 solutions, considering low budget and quick implementation.”

👉 This sets up a focused brainstorming session with realistic constraints.

## Process Improvement Template

**Prompt:** “I will provide a {process description or workflow}. Analyze it and identify any {inefficiencies/risk/compliance issues}. Suggest {improvements or best practices} step by step.”

**Example:** “I will provide our import customs clearance workflow. Analyze it and identify compliance risks. Suggest best practices to reduce delays.”

👉 Great for reviewing client processes with a fresh AI perspective.

## Comparative Evaluation Template

**Prompt:** “Compare {Option A} and {Option B} in terms of {criteria 1, criteria 2, …}. Provide a table of pros and cons and a recommendation for {use case or scenario}.”

**Example:** “Compare outsourcing vs. in-house logistics in terms of cost, control, and scalability. Provide a recommendation for a mid-sized retailer.”

👉 Delivers a clear comparison table with structured reasoning.

## Email / Communication Template

**Prompt:** “Draft a {type of communication} to {audience} about {situation or topic}. The tone should be {tone} and it should include {key points or calls to action}.”

**Example:** “Draft an email to the CIO of a client about new trade compliance features in our product. The tone should be confident and informative. Mention how it addresses regulatory changes and invite them to a demo.”

👉 ChatGPT/Copilot excels at this, producing structured, professional communication.

## ROI / Business Case Template

**Prompt:** “You are a financial analyst. Build a business case for {initiative}, focusing on {cost savings, efficiency, compliance risk reduction, revenue impact}. Present as bullet points with numbers where possible.”

**Examples**:

* “You are a financial analyst. Build a business case for automating HS classification. Focus on compliance risk reduction and savings from fewer penalties.”
* “You are a financial analyst. Build a business case for supply chain visibility software. Highlight efficiency gains and potential revenue protection from fewer stockouts.”
* “You are a financial analyst. Build a business case for carbon emission reporting automation. Focus on compliance readiness and potential reputational benefits.”

# Promoting AI Internally

As Solution Consultants, we not only benefit from using AI ourselves, but we can also take the lead in showing its value to colleagues and clients. Championing AI internally helps increase adoption, builds trust, and positions our team as innovators.

Demonstrate Value in Real Situations

* Share quick wins. For example, if ChatGPT/Copilot helped you draft a proposal section in 30 minutes instead of half a day, bring this up in a team meeting. Show before-and-after examples if possible.
* Use AI live in client meetings. If a client asks about a regulation or market trend, you can use Perplexity (while respecting confidentiality) to retrieve a fact and respond with the source. This shows professionalism and creates trust that you have data at hand.
* Research shows that while 80% of business leaders use AI regularly, only 20% of frontline employees do. By sharing how you use it, you help close this gap.

Educate and Train Your Team

* Run short internal workshops or brown-bag sessions on AI prompting.
* Focus on practical use cases like analyzing RFPs, preparing client briefs, or writing summaries.
* Use live demos to show how a vague prompt can be turned into a high-quality one.
* Encourage knowledge sharing through a central repository of prompts (OneNote, Confluence, Teams channel).
* Employees know they need AI skills, but most lack training. Your initiative to teach will be welcomed.

Focus on Responsible Use

* Be clear that AI supports our expertise, it does not replace judgment. Final responsibility remains with us.
* Share usage guidelines:
  + Do not input confidential client data into public tools unless approved.
  + Always fact-check AI outputs, especially for regulatory or numerical details.
  + Respect confidentiality and compliance rules.
* Promote AI with a balanced view: share both successes and caveats. Example: “Claude helped us summarize a contract quickly, but we had to correct a clause it misread.”

Involve Stakeholders in the Journey

* When clients or colleagues are impressed by an AI-powered insight, explain briefly how AI supported you.
* Offer to run a joint session with a client team (with approval). This builds trust and positions you as a forward-thinking partner.
* Internally, involve leadership by showing faster turnaround or higher-quality deliverables. This often sparks executive sponsorship for AI adoption.

Lead by Example in Daily Workflow

* Use AI visibly in meetings. For example, say: “Let me ask ChatGPT/Copilot for a quick approach to this” and share the result.
* Share AI-generated outlines or drafts to start discussions (clearly labeled as AI-drafted).
* Show not only successes but also lessons learned when AI fails, so others understand both strengths and limits.
* Transparency about your prompts and tools helps demystify AI and encourages experimentation.

Empower Colleagues and Clients

* Distribute cheat sheets or one-pagers such as “Top 5 prompts for supply chain managers”.
* Encourage colleagues and clients to start small with low-risk tasks like drafting emails or summarizing articles.
* These small wins build confidence and gradually grow into organizational capability.
* Reinforce the mindset that AI is a tool to work with, not a replacement.