



# **ESP+ AI Tools: Tips for Selling Smarter, Faster**

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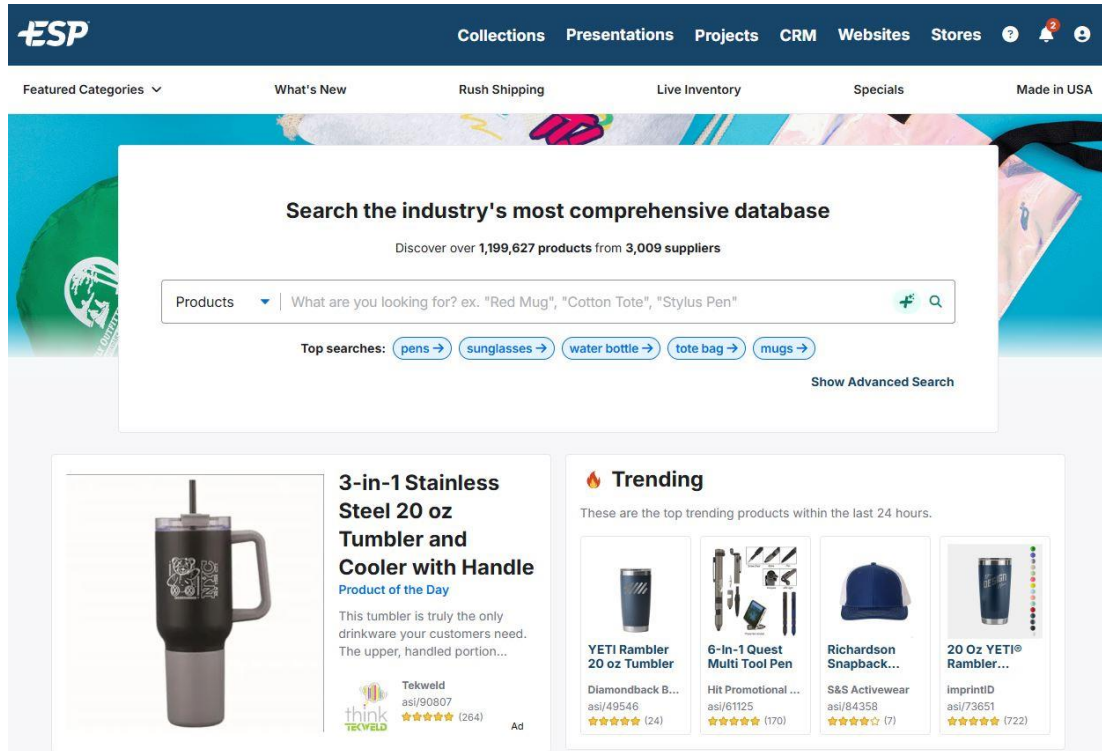
July 22-24, 2025

# Agenda

- 1. Key Features of ESP+**
- 2. AI Features**
- 3. ESP+ Presentations**
- 4. Client Portal**
- 5. Live Demo**

# ESP+ Is Your All-in-One Business Platform

Simplify product searches, streamline orders and manage client relationships – all from one connected platform.

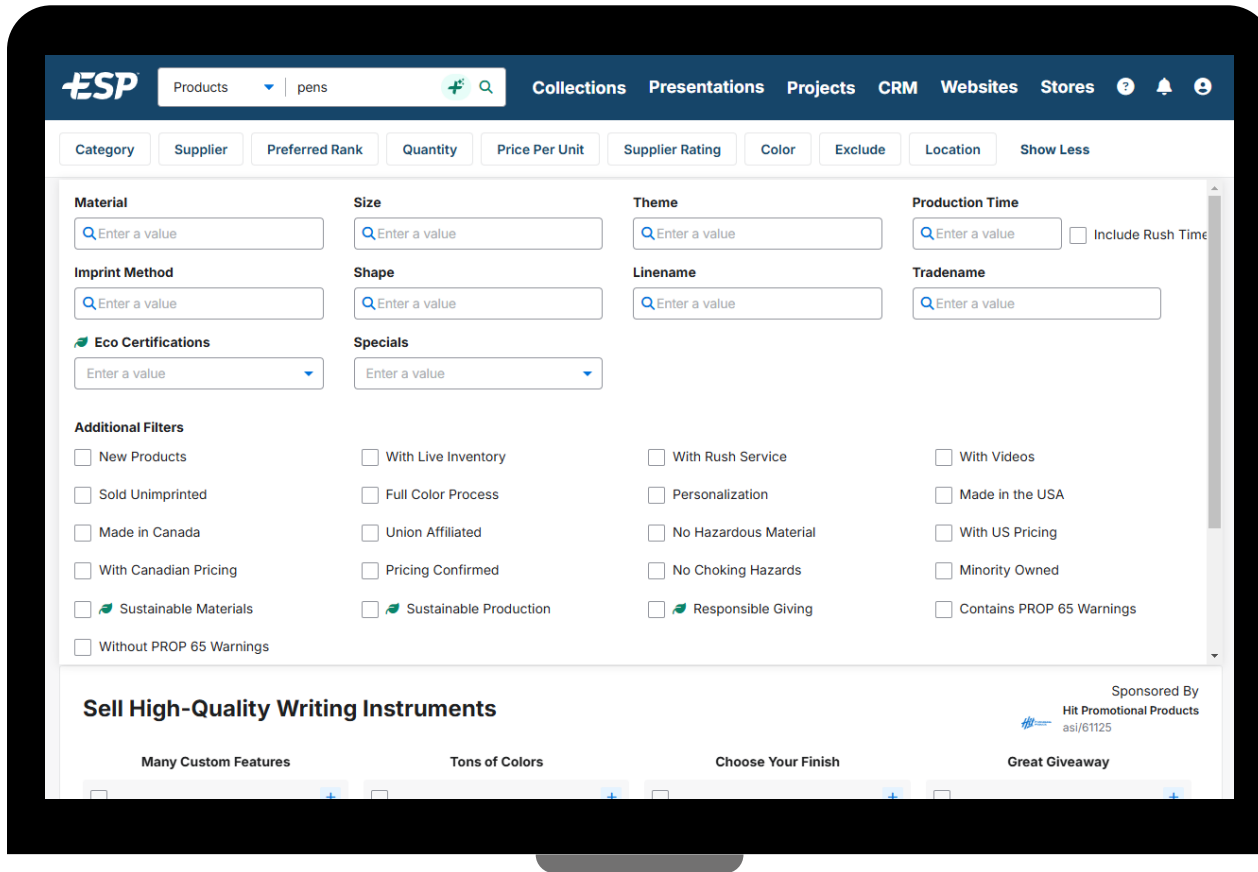


## Key Features:

- 1.2M+ products with accurate supplier data
- AI-powered presentation and search tools
- Built-in CRM and client portal
- QuickBooks Online integration
- End-to-end order and project management

# Search – Faster, More Filters, AI Guided

The industry's most comprehensive product database with over 1.2 million products at your fingertips



## Smarter & Faster Than Ever

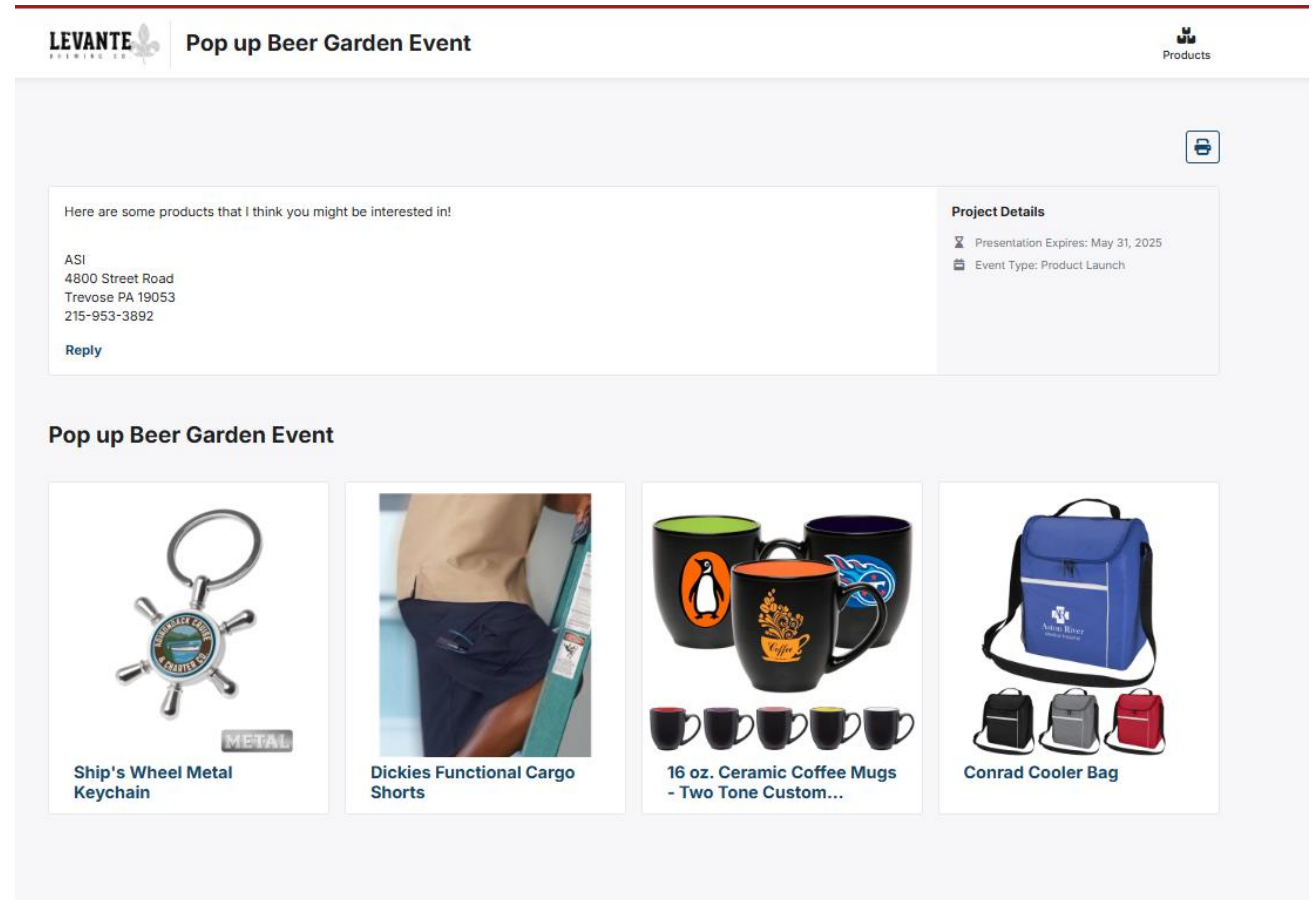
- 50+ advanced search filters to pinpoint results
- Guided AI for product suggestions tied to your input
- Personalized default settings
- Filter for USA-made
- Saved searches for your convenience

# ESP+ Presentations — Sell Smarter with Every Proposal

Create professional, personalized product proposals in minutes – complete with real-time client engagement.

## Highlights:

- AI-generated notes, product summaries, and email drafts
- Interactive client portal for feedback and approvals
- Virtual samples and customizable content
- Real-time notifications and CRM sync
- Personalize proposals with presentation templates

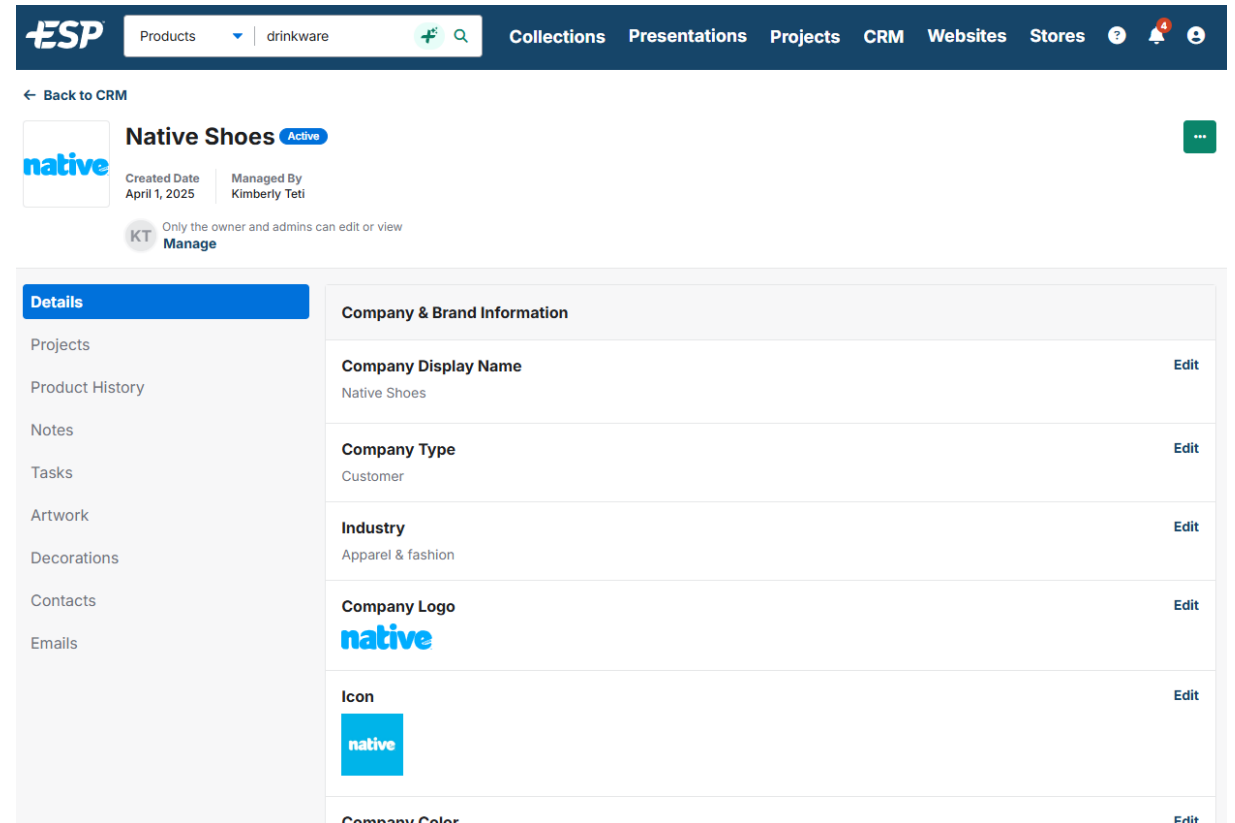


# ESP+ Client Portal & CRM – Centralized Client Management With a Branded Experience

By combining a professional, branded client portal with a powerful CRM communication, proposals, product feedback, and order history are all centralized. From project tracking and logo uploads to product preferences and real-time collaboration, everything stays connected and accessible in one place.

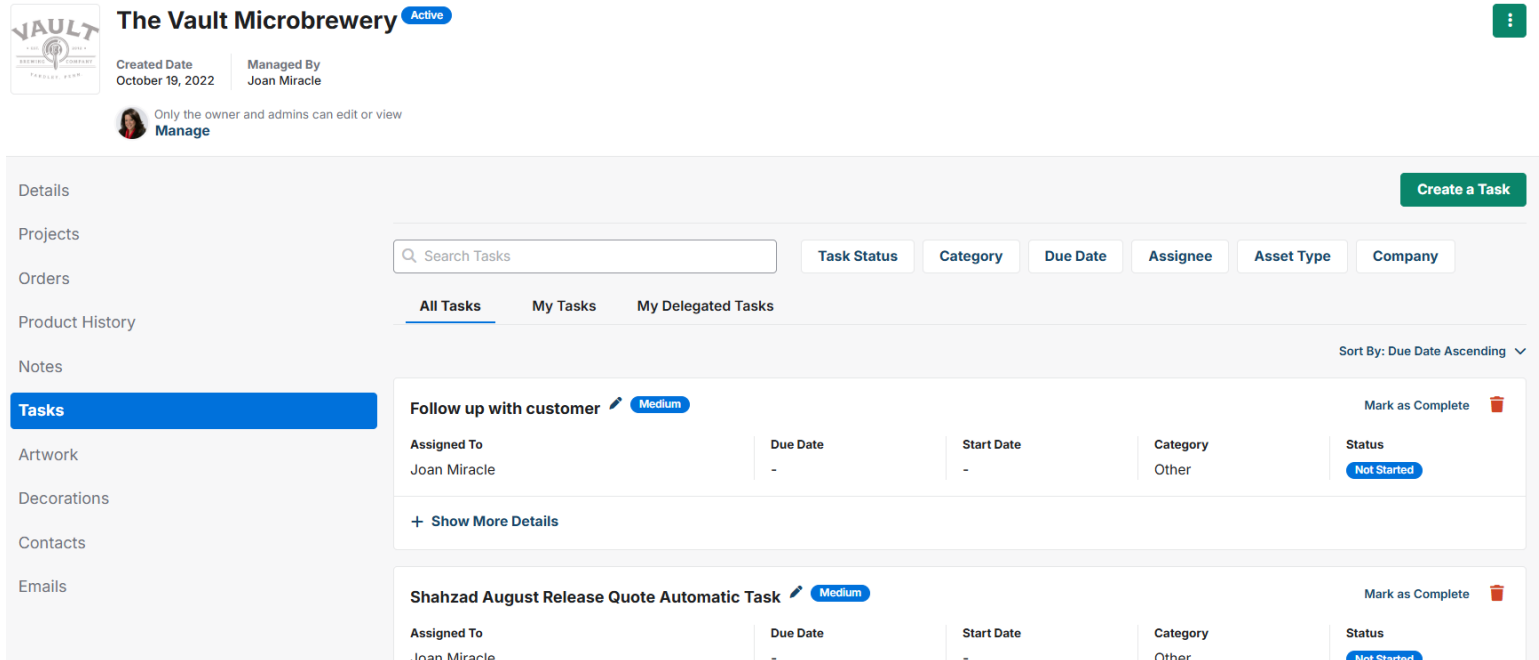
## Key benefits:

- Interactive client portal with your customer's branding
- Real-time quote requests, feedback, and communication
- CRM stores all history, artwork, preferences, and emails
- Track project status and log notes seamlessly



# Client Portal & CRM

Why invest in your own CRM when ESP+ provides one custom-built for promo?



The screenshot displays the 'The Vault Microbrewery' client portal. At the top, it shows the company logo, name, and an 'Active' status. Below this, it indicates the 'Created Date' as October 19, 2022, and 'Managed By' as Joan Miracle. A note states, 'Only the owner and admins can edit or view', followed by a 'Manage' button. The left sidebar contains navigation links: Details, Projects, Orders, Product History, Notes, Tasks (highlighted in blue), Artwork, Decorations, Contacts, and Emails. The main content area features a 'Create a Task' button and a search bar labeled 'Search Tasks'. Below the search bar are filter buttons for Task Status, Category, Due Date, Assignee, Asset Type, and Company. There are three tabs: 'All Tasks', 'My Tasks', and 'My Delegated Tasks'. The 'All Tasks' tab is selected, showing a list of tasks. The first task is 'Follow up with customer' (Medium priority), assigned to Joan Miracle, with a status of 'Not Started'. The second task is 'Shahzad August Release Quote Automatic Task' (Medium priority), also assigned to Joan Miracle, with a status of 'Not Started'. Each task has a 'Mark as Complete' button and a trash icon.



**Uniquely built** for promo, supporting customization, artwork and order management

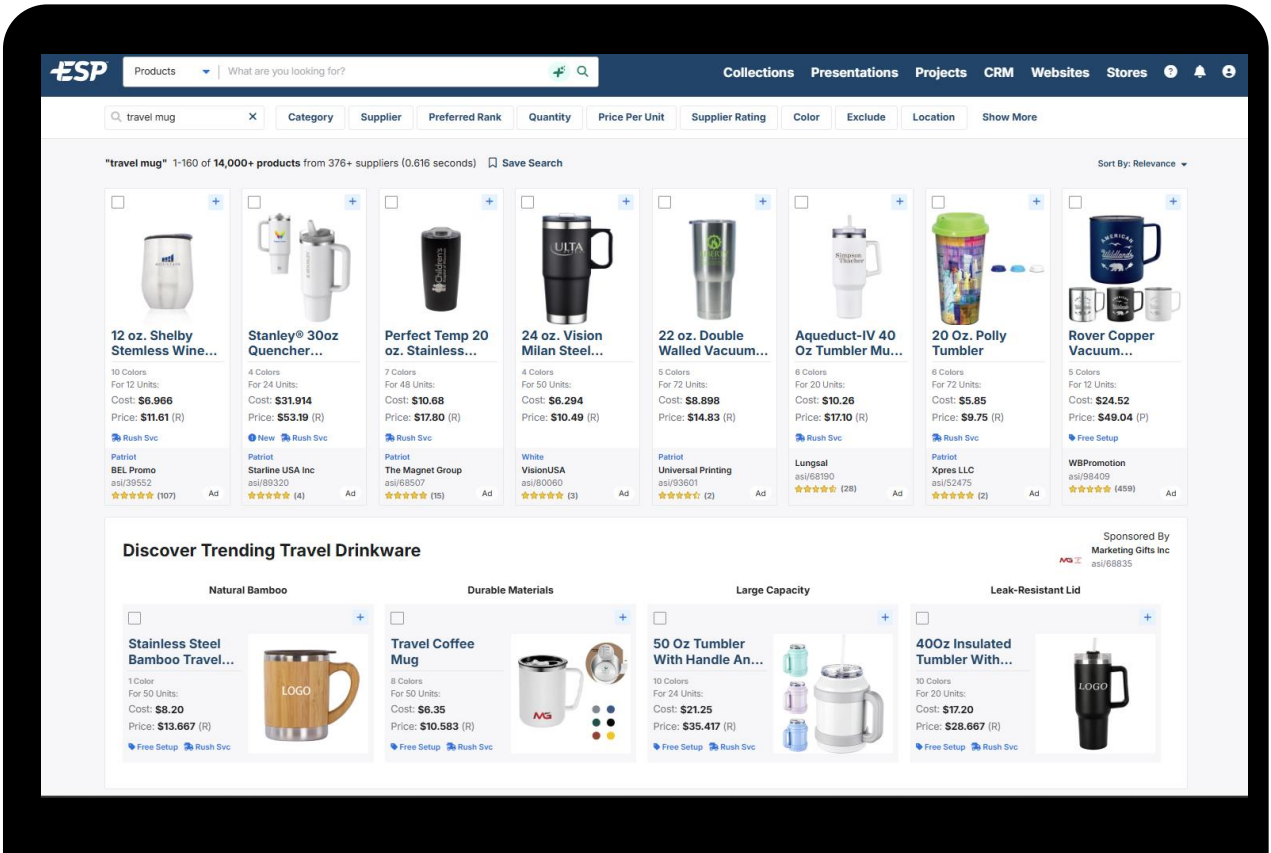


**Fully connected ecosystem** – connect to other features like Presentations and ESP+ Stores, making client engagement and order processing seamless



**Complete client profiles** with project tracking and client feedback

# Live Demo







**Share your feedback  
on the session with us!**



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