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PRACTICAL FIELD GUIDE & WORKBOOK

The AI Concept Playbook

for Promo Industry Marketers & Salespeople

How to use AI design tools to generate winning custom packaging concepts, from the first client conversation to the final presentation, without making promises you can't keep.

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A companion resource to the whitepaper:

"Is AI Selling More Packaging for Creative Distributors Smart Enough to Use It?"

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How to Use This Workbook

This guide is built for one purpose: to help you walk into a client meeting with AI-generated packaging concepts that are creative, credible, and actually closeable.

Every section has two layers. The first is context, the reasoning behind the step so you understand why it matters. The second is action, worksheets, checklists, and fill-in prompts you can use right now, on your next project.

Work through it in order the first time. After that, jump to whatever section fits where you are in the process. Most experienced users end up living in Sections 2, 3, and 4.

One Rule Before You Begin

Everything in this workbook assumes you have a trusted manufacturing partner, like Keepsake Products USA, you can call before a client presentation. If you don't have that relationship yet, building it is Step Zero.

A great AI concept in the hands of a distributor without a strong manufacturing partner is a liability, not an asset. The render makes a promise. Your manufacturer is the one who has to keep it.

SECTION 1

Before You Open the AI Tool

The client intelligence you need to collect first — every single time

Here's the mistake I see constantly: people open the AI tool first and think about the client second. You end up with beautiful renders that have nothing to do with the brand, the budget, or the business problem. That's not a concept deck. That's a portfolio of wishful thinking.

The AI tool is not where the creative process starts. It's where it gets visualized. The creative process starts with your knowledge of the client. The more you bring into the session, the more useful and grounded what comes out will be.

Work through the worksheet below before every AI design session. It doesn't need to take long. But skipping it will cost you more time later.

Worksheet 1A: Client Intelligence Brief

Fill this out before your AI session. Pull from your CRM, past conversations, the client's website, their social presence, anything you have.

THE CLIENT & BRAND

Company / Brand Name:

Industry / Category:

Brand personality in 3 words (e.g., bold, technical, coastal):

Brand colors — primary and secondary:

Key tagline or brand promise (if known):

THE PROJECT

What product(s) is this packaging for?

End-use scenario: ☐ Retail shelf ☐ Direct ship ☐ Event / gift ☐ Subscription

Approximate quantity / run size:

Budget sensitivity: ☐ Price-sensitive ☐ Moderate ☐ Budget is not the lead constraint

Timeline / in-hands date:

THE MOMENT YOU'RE DESIGNING FOR

Who receives this package? (consumer / business buyer / VIP / event attendee)

Where does the unboxing happen? (at a desk / at home / at an event / in a store)

What feeling should the recipient have when they open it?

Is there a specific trigger moment? (sound, reveal, texture, surprise element)

Will this be photographed / shared on social? ☐ Yes ☐ No ☐ Intended

YOUR MANUFACTURING PARAMETERS

What structural formats does your manufacturer do best?

What embedded/interactive elements have they successfully executed?

Any known constraints for this client? (material restrictions, retail compliance, etc.)

Estimated lead time available for prototyping before client presentation:

Worksheet 1B: Concept Direction Statement

Before you prompt, write a single sentence that captures what you're going for. This becomes the spine of every prompt you write in Section 2.

Examples

“A premium rigid mailer for a coastal lifestyle brand that makes the recipient feel like they just received something from the ocean, textural, immersive, and worth keeping.”

“A direct-ship shipper for a horror subscription brand that creates genuine theatrical surprise at the moment of opening, the package is part of the experience.”

YOUR CONCEPT DIRECTION STATEMENT

Write it here before you open the AI tool:

SECTION 2

The Art of the Expert Prompt

How to write prompts that produce concepts worth selling

Vague prompts produce generic results. “Create a cool box for a tech brand” gets you something that looks fine, means nothing, and could have come from anyone with a Google image search. That’s not a competitive advantage.

Expert prompts produce concepts worth selling. The difference is simple: expert prompts contain expert knowledge. Your years in this industry, your understanding of what manufactures, what ships, what creates a real emotional reaction, that’s what turns an AI image generator into a sales tool.

The AI has no guardrails. It will happily generate a concept that looks spectacular and cannot be manufactured for any reasonable cost or timeline. **Your knowledge is the guardrail.** Build it into the prompt.

The 6-Layer Prompt Framework

Every effective packaging concept prompt has six layers. The more you include, the more useful and realistic your output will be.

Layer 1: FORMAT

What structural format is this? Be specific.

Example: “A corrugated shipper / a rigid folding carton / a kraft mailer / a rigid setup box with magnetic closure”

Layer 2: ACTIVATION

What happens when someone interacts with it? What is the trigger moment?

Example: “Opens to reveal a lift-out tray / pull-tab triggers a sound / unfolds into a display surface”

Layer 3: MATERIAL FEEL

What does it feel, look, and smell like? Texture, finish, material quality.

Example: "Soft-touch matte laminate over rigid board / unbleached kraft with tactile emboss / gloss UV spot
on dark base"

Layer 4: BRAND IDENTITY

Anchor it in the brand. Colors, tone, world, personality.

Example: "Deep navy and copper / Pacific coast lifestyle brand / high-tech and minimal / bold street-culture energy"

Layer 5: RECIPIENT MOMENT

Who receives this and what do they feel?

Example: "A VIP client opening this alone at their desk / a consumer unboxing on camera / an event attendee surprised at a conference"

Layer 6: CONSTRAINT ANCHORS

What manufacturing or logistics constraints should this concept respect?

Example: "Must flat-ship for freight efficiency / no loose fill / standard corrugated die-line geometry with custom print"

Prompt Construction Worksheet

Fill in each layer, then combine them into a single flowing prompt at the bottom.

LAYER 1 FORMAT

What structural format?

LAYER 2 ACTIVATION

What is the trigger moment / interaction / reveal?

LAYER 3 MATERIAL FEEL

Texture, finish, material quality, surface treatment:

LAYER 4 BRAND IDENTITY

Colors, personality, brand world:

LAYER 5 RECIPIENT MOMENT

Who receives this, where, and what do they feel?

LAYER 6 CONSTRAINT ANCHORS

What manufacturing or logistics constraints should the concept respect?

YOUR ASSEMBLED PROMPT

Combine all six layers here before you type it into the AI tool:

ITERATION LOG

Iteration 1 — what changed:

Iteration 2 — what changed:

The version worth taking forward:

SECTION 3

The Feasibility Filter

Your internal checklist before anything leaves your desk

This is the step most people skip when they're excited about a concept. Don't skip it.

The AI has no awareness of manufacturing reality. It doesn't know that a corner geometry creates a structural failure in transit, that the embedded element requires a vendor your manufacturer doesn't have, or that the ink coverage on that dark base adds three weeks to the schedule.

You know these things. This checklist is designed to activate that knowledge before a concept gets in front of a client. A concept that fails this filter doesn't get thrown out. It gets modified, or it goes straight to your manufacturing partner, like Keepsake, for a reality check first.

The filter is a routing decision, *not a kill switch.*

Checklist 3A: The Structural Reality Check

STRUCTURAL INTEGRITY

- ☐ I have seen a structural format similar to this produced at commercial scale
- ☐ The geometry allows for standard stacking, shipping, and storage
- ☐ The format is appropriate for the product weight and fragility level
- ☐ There are no unsupported spans or geometries that would create transit failure points
- ☐ If irregular-shaped: I have discussed this format with my manufacturer previously

EMBEDDED / INTERACTIVE ELEMENTS

- ☐ If audio: I have seen this type of audio trigger executed in a commercial run
- ☐ If liquid: I have confirmed food-safe containment and trigger mechanisms are achievable
- ☐ If loose fill (sand, beads, etc.): I have discussed weight, containment, and leak risk with a manufacturer
- ☐ If electronic: I have a clear sense of component sourcing and assembly process
- ☐ If none of the above apply — standard structural concept: N/A

PRINT & FINISH

- ☐ Color/finish requirements are within standard press capabilities
- ☐ If dark base color: I have accounted for coating/laminate process in timeline and cost
- ☐ If emboss/deboss/foil: flagged as premium finish requiring additional lead time
- ☐ Print specifications are achievable on the structural format shown

COMMERCIAL VIABILITY

- ☐ The concept is realistic for the client's approximate budget range
- ☐ The concept is realistic for the client's timeline
- ☐ Minimum run quantity required is within the client's range
- ☐ I am presenting this as a creative direction — not a firm deliverable

Routing Decision

All boxes checked: → Proceed to manufacturer review (Section 4) as confirmation

Most checked, minor uncertainties: → Proceed to manufacturer review with specific questions flagged

Several unchecked in structural or embedded elements: → Do not present to client yet — send to manufacturer for feasibility review first

Significant unknowns in commercial viability: → Revisit client budget/timeline conversation before proceeding

SECTION 4

The Manufacturer Review

How to partner with your manufacturing contact the right way

This is the step that separates the professionals from the people who are about to have a very difficult client conversation in about sixty days.

Your manufacturing partner has seen thousands of structural concepts. They know in fifteen minutes whether a concept has a realistic production pathway, what it will cost roughly, and what timeline is realistic. They know which elements of the render are real and which ones will require re-engineering.

The distributors who are closing the weird, high-value stuff right now have one thing in common: **they call their manufacturer before the client meeting.** Not after. Not during. Before.

Worksheet 4A: Manufacturer Review Brief

Fill this out and share it, or use it as the structure for your call, when you bring a concept for review.

CONCEPT SUMMARY

One-sentence description of the concept:

Structural format:

Key interactive or embedded element (if any):

Intended end-use scenario:

Approximate quantity being discussed:

QUESTIONS FOR YOUR MANUFACTURER

Is the structural format achievable as shown, or does the geometry require modification?

Is the embedded/interactive element something you've executed at commercial scale?

What elements of the render would require re-engineering?

Rough timeline from approved concept to first prototype?

Any material or component sourcing concerns before client presentation?

MANUFACTURER FEEDBACK

Achievable as shown? ☐ Yes ☐ With modifications ☐ Requires significant re-engineering

Elements requiring modification:

Rough prototype timeline:

Rough cost range (if available):

Manufacturer's recommendation:

What Good Manufacturer Feedback Sounds Like

A partner worth having gives you one of three responses:

- "This is buildable as shown. Here's the rough cost and timeline."
- "This is buildable with these modifications — here's what changes and why."
- "This specific element isn't achievable, but here's an alternative that gets you the same effect."

If your manufacturing contact can't respond clearly to a structural concept in a reasonable timeframe, that's a signal worth paying attention to.

SECTION 5

Presenting AI Concepts to Clients

Language that sells the vision without creating a liability

You've done the work. You've built expert prompts, filtered the concepts, and run the strongest one by your manufacturer. Now you're in the client meeting.

How you frame the concept in this conversation determines whether you create a partnership or a problem. The difference often comes down to a handful of specific words.

The Language That Works

INSTEAD OF THIS...

"This is what we'll make for you."

SAY THIS.

"This is the creative direction we're proposing. The structural concept is solid, and we've already had a preliminary review with our manufacturing partner. The final specification gets refined through prototyping, and we confirm all execution details before anything goes to production."

That second version communicates that you've done the legwork, sets accurate expectations, protects you if changes are needed, and positions your manufacturer relationship as a value-add rather than a caveat.

Worksheet 5A: Presentation Language Prep

Before each client meeting, complete this brief. The goal is to have your key phrases ready before you walk in the room.

YOUR OPENING FRAME

How will you introduce the concept? (1–2 sentences that set creative context without overpromising)

The "big idea" in plain language — the one sentence the client will remember:

THE EXPECTATION SETTER

What language will you use to communicate, this is a creative direction, not a finished specification?

Your answer if the client asks: "Can you guarantee it will look exactly like this?"

THE MANUFACTURER CONFIDENCE STATEMENT

How will you reference your manufacturer review to build credibility?

e.g., "We've already run this by our structural team and confirmed the core concept is achievable."

ANTICIPATE THE HARD QUESTIONS

If asked about cost:

If asked about timeline:

If asked about changes from the render:

The Bait-and-Switch Warning

When a client falls in love with an AI render and then receives a product that looks materially different, their experience is: “I was shown X and I received Y.” That is a bait-and-switch in their mind, regardless of your intent. And in this industry, where relationships are everything, that perception can end a partnership.

The fix is not to present less-exciting concepts. The fix is to **use language that separates the creative vision from the production specification** from the moment you walk in the room.

SECTION 6

Prompt Library

Ready-to-use expert prompts for 8 common promo scenarios

These are not generic starting points. Each prompt is built using the 6-layer framework from Section 2 and incorporates real manufacturing constraints. Use them as-is or adapt them using your client intelligence from Section 1.

Each prompt includes a “watch for” note flagging the elements most likely to need manufacturer review before client presentation.

PROMPT 1 LUXURY BRAND / PREMIUM GIFT

Create a concept for a premium rigid setup box with a magnetic closure lid, designed for a luxury personal care brand. The box should feel weighted and substantial when held. The exterior finish is deep forest green with a soft-touch matte laminate and a debossed monogram. The interior features a custom-molded pulp tray with a champagne linen liner. The recipient is unboxing this alone, at home, as a gift to themselves. The structure must be compatible with standard retail-shelf dimensions and allow for efficient flat-pack shipping.

Watch for: Over-rendered metallic interior treatments that assume a foil process. Custom pulp tray geometry may require minimum runs higher than standard.

PROMPT 2 TECH / ELECTRONICS LAUNCH

Design a direct-ship product box for a consumer electronics brand launching a wireless audio product. The brand identity is minimalist and high-tech: matte black exterior, single color accent in electric blue. The interior features a foam-inlay presentation tray and a secondary drawer that slides out from the base to reveal accessories. The opening sequence should feel deliberate and reveal the product from

above when the lid is removed. The box must protect a product weighing approximately 800 grams and ship reliably without additional outer packaging.

Watch for: Sliding drawer mechanisms add complexity and cost — confirm manufacturer experience with this format. Matte black can be press-demanding; confirm coating process.

PROMPT 3 EXPERIENTIAL / THEATRICAL UNBOXING

Concept a theatrical direct-ship shipper for a subscription brand in the entertainment or collector space. The exterior should suggest something unexpected before it is opened — use structural cutouts, unusual geometry, or exterior surface treatment to create anticipation. The interior experience should include a reveal sequence: a first layer that sets a scene before the product is visible. The target recipient is a collector who photographs unboxing experiences. The design must be achievable in corrugated with custom print and finish, shipping as a single unit.

Watch for: Unusual exterior geometry can create corner stress failures. Verify manufacturer capabilities on non-standard die-line geometry before presenting reveal sequence concepts.

PROMPT 4 FOOD & BEVERAGE / SPECIALTY GIFTING

Design a specialty gift box for an artisan food brand shipping a curated assortment of premium condiments. The box is a lift-lid rigid format with a kraft and cream color palette and a warm, handcrafted visual identity. The interior features individual compartments for four glass jars, with a card slot built into the lid interior. The recipient receives this as a gift through direct mail. The box must protect glass contents through standard parcel shipping and must not require secondary outer packaging for standard weight loads.

Watch for: Compartment configuration for glass protection requires specific insert engineering, flag for your manufacturer's structural team early. Weight with glass product affects shipping classification.

PROMPT 5 TRADE SHOW / EVENT GIVEAWAY

Create a concept for a flat-pack, self-assembly presentation box for use as a high-end trade show gift. The box should assemble without tools or adhesive and hold its form securely when constructed. The exterior print is full-color with a bold graphic treatment, gloss UV spot on key elements. The interior holds a single promotional product approximately the size of a padfolio. The box needs to be efficient to transport flat to an event and quick to assemble on-site. Standard corrugated construction, no embedded electronics or loose fill.

Watch for: Self-assembly mechanisms vary significantly in user-friendliness — request a physical prototype to test assembly before committing to quantity.

PROMPT 6 BRAND ACTIVATION / VIP KIT

Design a VIP welcome kit box for a B2B brand onboarding new enterprise clients. The box is a rigid slipcase format: the outer sleeve pulls away to reveal a secondary box. The outer sleeve is dark navy with a gold foil brand mark. The inner box opens to a branded message card positioned face-up above a presentation layer of brand items. The overall effect should feel like receiving an award, not a package. Ship weight under 2 kg. Must be compatible with standard courier shipping without additional outer packaging.

Watch for: Slipcase format with tight tolerances requires precise manufacturing, verify manufacturer experience and get prototype fit confirmed before production approval.

PROMPT 7 — SEASONAL / HOLIDAY CAMPAIGN

Create a holiday gift box concept for a retail brand sending to top-tier wholesale accounts. The box is a rigid lid-and-base format in deep burgundy and gold, with a winter botanical emboss on the lid exterior. The interior is lined with a custom tissue in a complementary pattern. The box holds a curated assortment of four to six small gift items arranged for visual impact when opened. The design should feel premium and reusable, the recipient should want to keep the box. Flat-pack shipping efficiency is a secondary consideration for this run.

Watch for: Reusable premium rigid boxes require specific board weight and hinge construction confirm manufacturer's premium rigid box capabilities separately from standard carton production.

PROMPT 8 — CAUSE / MISSION-DRIVEN BRAND

Design a sustainable direct-ship mailer for a B-Corp certified personal care brand. The structure is a self-sealing corrugated mailer using 100% recycled board and water-based inks only. No virgin plastic in any component. The exterior carries the brand's sustainability messaging in a typographic treatment: clean, editorial, and confident rather than preachy. The interior features a seed paper insert that can be planted after use. The mailer must protect a single fragile glass bottle. The entire package should be curbside recyclable without consumer disassembly.

Watch for: Seed paper inserts require a specific supplier relationship, confirm source before promising this element. Recyclability claims require material certification before client communication.

SECTION 7

Master Pre-Presentation Checklist

The final gate before every client meeting

Print this page. Use it before every client meeting where you're presenting an AI-generated concept. It takes five minutes. It has saved more than a few relationships.

SECTION 1 — CLIENT INTELLIGENCE

- ☐ I completed the Client Intelligence Brief before my AI session
- ☐ I wrote a Concept Direction Statement before I opened the AI tool
- ☐ The concept is directly connected to this client's brand identity, end-use scenario, and budget range

SECTION 2 — PROMPT QUALITY

- ☐ I used the 6-layer prompt framework (format, activation, material, brand, moment, constraints)
- ☐ My prompts included manufacturing constraint anchors from my knowledge of what actually builds
- ☐ I iterated through at least two versions before selecting the concept I'm presenting

SECTION 3 — FEASIBILITY FILTER

- ☐ Structural format is achievable — I have seen something structurally similar manufactured
- ☐ Embedded/interactive elements (if any) have been executed at commercial scale
- ☐ Print/finish specifications are within standard process capabilities
- ☐ Concept is realistic for this client's budget and timeline

SECTION 4 MANUFACTURER REVIEW

- ☐ I have shared this concept with my manufacturing partner before this presentation
- ☐ I have received preliminary confirmation that the core concept is achievable
- ☐ I know which elements (if any) may require modification
- ☐ I have a rough sense of prototype timeline and cost range

SECTION 5 PRESENTATION LANGUAGE

- ☐ I am presenting this as a creative direction, not a finished specification
- ☐ I have language ready that references my manufacturer review as a confidence signal
- ☐ I have prepared answers for questions about cost, timeline, and potential changes from the rendering

☐ I am not making any promises that my manufacturing partner has not confirmed

The One-Line Gut Check

Ask yourself honestly: If this concept requires modifications in the manufacturing process, am I prepared to have that conversation with this client from a position of trust, not surprise?

If the answer is yes, because you've set expectations correctly from the start, you're ready. **Go close it.**

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