

The Founder's Wholesale Checklist

From Stockist Lab. A practical checklist for founders who sell into stores themselves. Work through it once to set up, then come back to it each season.

How to use it: tick what you already have and circle what you don't. Each section ends with a copy-paste prompt that works in ChatGPT, Claude, or Grok Bot. The free versions of ChatGPT and Claude are enough to start. Open a new chat, attach your file if the prompt asks for one, paste the prompt, and fill in the brackets. The AI drafts and organizes, and you decide what goes out to a buyer.

Pick your setup

Before the checklist, decide where your AI work will live. The AI model is the brain. The app around it (ChatGPT, Claude, or Grok Bot) is called the **harness**. The harness decides where your files are saved, what the AI can connect to, and whether anything keeps running after you close your laptop. Same prompts, different homes.

Level 1. Just chat (free to about \$20 a month). In ChatGPT or Claude, make one Project called "Wholesale." Upload your line sheet, prices, terms, and store list once, so every chat starts with them. You click, the AI drafts. Nothing runs on its own. Every prompt in this checklist works here.

Level 2. An assistant that keeps working (about \$20 to \$30 a month, as of October 2026; plans change often, so check before you pay). Claude Pro, ChatGPT Plus (with Work), and Grok Bot can all run a task every Monday while your laptop is closed. For example: check your store tracker and draft this week's follow-ups for you to approve. Grok Bot also has its own always-on computer with saved files and logins, so it can work inside wholesale websites too.

Level 3 (optional). An always-on computer. Most founders can skip it.

Three habits for any level:

- Sign up with your brand email, not your personal one, so buyer info stays with the business.
- Keep your trackers in Google Drive, not on your laptop. That's what lets the AI find them while you're away.
- Ask for drafts, and approve anything before it reaches a buyer.
- Protect buyer info. On free or personal plans, turn off model training in settings, and don't upload buyer names, emails, or card photos unless you're comfortable with that.

1 Line sheet

- ☐ One clear photo per product, same background and crop
- ☐ Product name, SKU, and each color or size option with its own SKU
- ☐ Short description: materials, fit or size, care
- ☐ Wholesale price and suggested retail price (MSRP) side by side
- ☐ Case pack, opening order minimum, and reorder minimum
- ☐ Lead time, ship window, and how to order (email, order form, or wholesale platform link)
- ☐ File named with brand and season, small enough to attach to an email
- ☐ Date on the cover, so you know which version a buyer has

AI ASSIST · CHATGPT OR CLAUDE

Upload your product spreadsheet and paste: "Check this product list for wholesale. Flag any product missing a photo, SKU, wholesale price, MSRP, or minimum, and any product where MSRP is less than twice wholesale. Give me a short fix list." Fix the gaps before you design anything.

2 Pricing and terms

- ☐ Landed cost per unit, including freight and duties
- ☐ Wholesale price that leaves you a healthy margin after landed cost
- ☐ MSRP that gives the store room to profit (many shops plan on roughly double wholesale)
- ☐ Payment terms written down: prepay, card on file, or net terms, and who qualifies
- ☐ Shipping, damages, and returns policy in two or three sentences
- ☐ A rule for new accounts (for example, prepay on the first order, terms after that)

AI ASSIST · CHATGPT OR CLAUDE

Upload your cost sheet and paste: "For each product, work out landed cost, my wholesale margin, and the store's margin at MSRP. Show it as a table and flag anything where my margin is under [your target]%. Check the math on two products yourself."

3 Store prospecting

- ☐ A written picture of your ideal store: location, price range, the brands they carry, their customer
- ☐ A list of 20 to 40 stores that fit, not hundreds that might
- ☐ For each store: website, Instagram, city, two or three brands they carry, and a fit score from 1 to 5
- ☐ The right contact route for each one (wholesale email, buyer name, or a "submit your brand" form)
- ☐ Stores you already sell to, marked so you never pitch them by mistake

AI ASSIST · CHATGPT OR CLAUDE

Paste: "My brand sells [what you make] at [retail price range]. My ideal store is [describe it]. Suggest 30 independent shops in [region] that fit, with website, city, a fit score from 1 to 5, and one line on why. Only list real stores you can link to. If you can't confirm a store or its website, mark it UNVERIFIED instead of guessing." AI tools without web search can invent stores, so open every store's website before you pitch it.

4 Pitch and follow-up

- ☐ A short first note that names one specific reason the store is a fit
- ☐ Line sheet attached or linked, and an offer to send samples to serious interest
- ☐ Follow-up 1 about a week later, and follow-up 2 about a week after that
- ☐ One place to track every store: date pitched, follow-up dates, response, next step
- ☐ You read and send every message yourself. No bulk sends and no bought lists.

AI ASSIST · CHATGPT OR CLAUDE

Paste: "Write a short, friendly first email from me to the buyer at [store]. Mention [one specific reason they fit], link my line sheet, and offer samples. Then write two shorter follow-ups for one and two weeks later." Edit it so it sounds like you, then send it yourself.

5 Trade show

- ☐ Show chosen for fit, with a budget that includes booth, travel, samples, and displays
- ☐ A list of stores you want to see, with invites sent two to four weeks ahead
- ☐ Booth kit: line sheets, order forms, card reader or tablet, business cards, a lead sheet
- ☐ A quick note after every conversation: who, store, what they liked, next step
- ☐ Follow-ups sent within 48 hours of the show closing

AI ASSIST · CHATGPT OR CLAUDE

After each show day, upload photos of the business cards and your quick notes, then paste: "Turn these into a lead table with name, store, city, email, what they liked, and next step. Then draft a short follow-up email for each that mentions what we talked about."

6 Samples and orders

- ☐ A tracker for every sample sent: store, items, date, and feedback due date
- ☐ Opening orders logged with ship date, payment status, and terms
- ☐ A check-in planned 10 days after any sample with no reply
- ☐ Invoice due dates in one view, sorted by what is due next
- ☐ For stores on terms, you know their payment schedule and remind them a few days before it

AI ASSIST · CHATGPT OR CLAUDE

Every Monday, upload your tracker and paste: "List samples waiting on feedback for more than 10 days, orders shipping this week, and invoices due or overdue. Then draft a polite reminder for each overdue invoice." Check every amount and date against your records, then edit and send it yourself.

7 Reorders

- ☐ Last order date for every stockist
- ☐ Each store's usual reorder gap (or a default, such as 60 to 90 days)
- ☐ A friendly check-in when a store is due: what sold, what's new, an easy way to reorder
- ☐ Sell-through notes from stores, saved where you'll see them before the next season
- ☐ A short list of your best accounts that get a personal call or note each season

AI ASSIST · CHATGPT OR CLAUDE

Upload your stockist list with last order dates and paste: "Today is [date]. Which stores are more than [75] days past their last order? For each one, draft a short, personal check-in that mentions what they bought last time and one new item." You review and send.

8 Weekly snapshot

- ☐ One page, same day every week
- ☐ Wholesale and direct sales for the week
- ☐ New stores, reorders, and open opportunities
- ☐ Top five products, and anything running low
- ☐ Invoices more than seven days overdue
- ☐ The three most useful things to do this week

AI ASSIST · CHATGPT OR CLAUDE

Every Monday, upload last week's order export and your tracker, then paste: "Make a one-page weekly snapshot: wholesale and direct sales, new stores and reorders, top five products, anything running low, invoices more than seven days overdue, and the three most useful things I should do this week."

A few ground rules that keep wholesale healthy

1. A person approves anything that goes to a buyer.
2. Pitch fewer, better-fit stores. Buyers notice when a note was written for them.
3. Keep one source of truth for stores, samples, orders, and invoices.
4. Ask stores how they like to reorder, and make that easy.

Want the full playbooks? Each section above has a step-by-step version, with copy-paste prompts and templates, in the Stockist Lab Starter Pack. Weekly tips arrive in The Sell-In, our free newsletter.

Stockist Lab, a VSP Group company. stockistlab.com. Examples and prompts are general guidance, not professional advice. Tool names belong to their owners; Stockist Lab is not affiliated with them unless noted.

Sources behind this checklist: Faire, "How to get product in stores" (faire.com/blog/for-brands/how-to-get-product-in-stores); Open Shelf line sheet guide (joinopenshelf.com/line-sheet-template); Shopify Community discussion on tracking net-30 payments (community.shopify.com).

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