

Reachdesk

salesforce

Helping teams gift
smarter, at the right
moment, to the
right person

reachdesk.com



Salesforce x Reachdesk turns stalled pipeline into revenue wins

You've seen it before: marketing hits its lead goals, sales fills the pipeline, and customer success keeps accounts ticking along. But when you look closer, something's off:

- ✖ **Marketing** can't prove which campaigns actually drive revenue.
- ✖ **Sales** burns through prospects with outreach that feels copy-and-paste.
- ✖ **Customer success** relies on generic touchpoints that don't build lasting loyalty.

The harsh reality? Today too many brands commoditize relationships. Authentic connections are the exception, not the rule.

That's where [Salesforce](#) and [Reachdesk](#) change the game.

And it works, [Reachdesk's State of Gifting Report reveals](#):

- ✔ **49%** executive engagement on marketing campaigns when gifting is included.
- ✔ **447%** more opportunities generated by adding gifts to your strategy.
- ✔ **61%** of customers are more positive about a brand after receiving a gift.
- ✔ **+25%** response rates from cold prospects and +18% boost in demo attendance.

Together, they solve the question every revenue team faces: **How do you scale personalization without losing authenticity?**

The answer isn't more automation. It's **smarter automation**: knowing exactly when to add the human element that makes all the difference.



is your system of record: tracking every lead score, deal stage, and customer milestone.

Reachdesk

turns those signals into action: the perfectly timed gift that sparks curiosity, reignites stalled deals, and transforms renewals into celebrations.

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How marketing teams turn lead generation into revenue attribution with Salesforce x Reachdesk

The attribution nightmare keeping marketers up at night

You’ve been there. The CEO asks: “What’s our marketing-sourced revenue this quarter?” The answer should be simple, but it never is.

Your team generates thousands of leads, runs webinars, builds nurture programs, and creates content. But somewhere between “MQL” and “Closed Won,” the story falls apart. Sales says the deals came from referrals or cold outreach. Marketing can’t prove otherwise.

The truth? **Traditional touchpoints don’t stick.**



Inboxes are flooded with automated emails and LinkedIn requests.



Webinar follow-ups vanish without a trace.



Nurture sequences feel robotic and forgettable.

When deals close, those digital touches rarely get the credit, leaving marketing in the dark.

How Salesforce x Reachdesk transforms marketing attribution

With Salesforce as your system of record and Reachdesk as your gifting activation layer, every marketing touchpoint becomes memorable and trackable. Instead of another forgotten email, prospects receive something physical that sits on their desk, reminding them of your brand long after the campaign ends.

Here’s how the magic works:



Salesforce captures lead, contact and campaign data to support pipeline management



Reachdesk facilitates using Salesforce data to trigger the delivery of perfectly timed, memorable gifts



Every Reachdesk gift interaction flows back into Salesforce for visibility and attribution



Gifting attribution and ROI becomes crystal clear with tangible touchpoints and insights visible in Reachdesk and Salesforce campaigns that sales teams remember

The result? **447% more opportunities generated** by adding triggered gifts to your strategy.



24% close rate

“I find it very useful that you can connect to Salesforce, Marketo, and Salesloft from Reachdesk.”

Laura Xavier Marketing Manager EMEA, Rapid7

Read the story

Creative marketing gifting plays that drive pipeline

Ready to put Salesforce x Reachdesk into action?

Here are four proven marketing plays you can launch today.

ABM account breakthrough campaign

1. Salesforce trigger: High-value target account shows 3+ web page visits or content downloads in Salesforce

2. Reachdesk gift idea: Custom executive survival kit with premium stress ball, artisanal tea blend, and a "Strategic Thinking" puzzle



3. Messaging: "Navigating [industry challenge]? We've got the tools to help you solve it. Let's discuss your strategy over tea."

Navigating [industry challenge]? We've got the tools to help you solve it. Let's discuss your strategy over tea.

Reachdesk

4. Why it works: Creates a physical presence in the prospect's office while positioning your brand as a strategic partner

Post-demo momentum builder

1. Salesforce trigger: Demo has completed and you want to follow-up drive further engagement

2. Reachdesk gift idea: Gourmet popcorn gift set with flavors like "Growth Hack" and "Innovation Crunch"



3. Messaging: "Great demo last week! While you're popping through options, we're here when you're ready to make it happen."

Great demo last week! While you're popping through options, we're here when you're ready to make it happen.

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4. Why it works: Breaks through the post-demo silence with humor while keeping your solution top-of-mind

Event VIP experience

1. Salesforce trigger: High-intent leads register for your major event

2. Reachdesk gift idea: Pre-event "Conference Survival Kit" with premium power bank, notebook, and local artisanal snacks



3. Messaging: "Powering up for [Event Name]? This should keep you charged and focused on what matters most."

Powering up for [Event Name]? This should keep you charged and focused on what matters most.

Reachdesk

4. Why it works: Creates anticipation and ensures your brand is physically present throughout the event

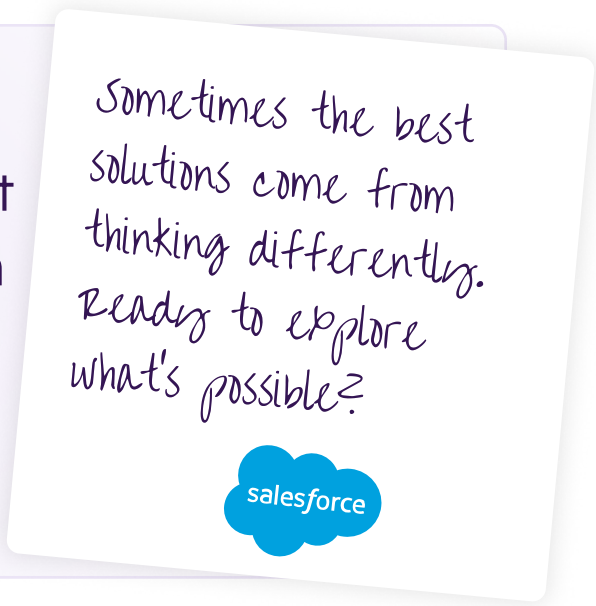
Nurture sequence accelerator

1. Salesforce trigger: Lead stuck in nurture for 60+ days with high engagement but no progression

2. Reachdesk gift idea: "Think Outside the Box" kit with unique desk toy, brain teaser, and premium dark chocolate



3. Messaging: "Sometimes the best solutions come from thinking differently. Ready to explore what's possible?"



4. Why it works: Re-energizes stale prospects while encouraging them to think creatively about their challenges

 See ABM gifting in action: How TORQUE BY RYDER generated \$26K in pipeline

Ryder wanted to break into large fleet accounts across the US by reaching fleet and maintenance managers making service decisions. With Torque as a new product, their goal was to build awareness, start conversations, and drive meetings for their reps.

They shipped custom-designed bundles featuring car tools tied to mobile fleet maintenance, each paired with notecards highlighting different solutions. The box design reinforced the Torque brand story while keeping the experience relevant to recipients.

The campaign is already driving results. With 26 boxes delivered so far, Ryder has generated **\$26K in potential pipeline** and seen an **18% increase in responses**.

 **\$26k** in potential pipeline



Key Salesforce x Reachdesk capabilities for marketing teams

From predictive insights to personalized gifting, these platform features give marketers everything they need to drive impact and scale.

Salesforce powers smarter marketing & sales alignment	Reachdesk turns every gift into an unforgettable moment
Campaigns Management: Control how campaigns appear and what data your team sees. Customize fields, layouts, and related lists to streamline campaign management.	Curated Gift Marketplace: Access thousands of eGift and physical gift options sourced from local vendors and Amazon deliverable to 180+ countries. Perfect for personalized, global gifting at scale.
Einstein Lead Scoring: AI predicts which leads are most likely to convert, so marketing can focus on high-value prospects and boost pipeline efficiency.	Automated Campaigns: Automate gift sends based on Salesforce updates or campaign membership, keeping your outreach timely and relevant.
Marketing Cloud Account Engagement (MCAE): Deliver smarter, multichannel campaigns with AI and advanced personalization. Use Data Cloud to unify data, send email + SMS journeys, and optimize engagement.	Secure re-usable links: Deliver personalized gift experiences at scale through email campaigns and personalized in-app landing pages, making every recipient feel valued.
Journey Builder: Create seamless, personalized customer journeys across email, mobile, and ads. Trigger actions in real time and ensure consistent messaging across all channels.	Gift ROI Tracking: Measure the impact of your gifting campaigns against marketing KPIs to prove value and optimize strategy. Dashboard directly links to your Salesforce and CRM to ensure consistency across reporting.
Campaign with Influenced Opportunities Report: Measure campaign impact on pipeline. See which campaigns drive opportunities and prove marketing ROI.	Marketing integrations: Reachdesk integrates not only with Salesforce but also with leading marketing automation platforms like HubSpot, Marketo, and more, creating a fully connected ecosystem where campaign data flows seamlessly between systems.



38.7x ROI

“Reachdesk is a Swiss Army Knife for direct mail campaigns. The gift options are seemingly endless, and working with our wonderful project manager Michelle really enhances the experience.”

Vivian Yuen, Campaign Manager (ABM) at SentinelOne

Read the story



“Salesforce supports sustainable growth so we can tap into society’s increasing desire for more ethical banking.”

Derek Usher, Chief Operating Officer, Tandem Bank

Read the story



How sales teams turn cold outreach into warm conversations with Salesforce x Reachdesk

The outreach crisis crushing sales performance

You're sending hundreds of emails and LinkedIn messages, but responses are scarce. Meetings booked? Minimal. Deals progressing? Even less.

Your prospects are inundated with generic outreach. Carefully researched messaging gets lost in a sea of sameness. Even when you connect, building trust feels slow and uphill.

The harsh reality: **modern buyers have built walls around their attention.** Traditional sales tactics bounce off. You're stuck in a cycle of high activity but low impact, spending most of your time on admin and generic outreach while competitors capture attention and push deals forward.



\$1.4M of MRR through meaningful connections with customers

"I had a very uninformed view of what gifting was. I feel like we started off at this place of unknown, worried we're going to burn bridges. Now, we think this is a really efficient and thoughtful lever to pull."

Chris Long, Outbound Marketing Specialist

[Read the story](#)

How Salesforce x Reachdesk breaks through the noise (and wins deals)

Salesforce provides the visibility reps need: lead scores, opportunity stages, engagement history. But data alone doesn't spark conversation. That's where Reachdesk steps in.

By triggering thoughtful, personalized gifts directly from Salesforce and your CRM, reps can turn static data into action that cuts through digital noise. Instead of being another ignored email, you become the rep who gets it: the one who sent something meaningful that sits on their prospect's desk, generating curiosity and opening doors.

The transformation is immediate:



Email open rates climb from **39% to 85%** with gifting campaigns, a 119% lift that makes cold prospects pay attention.



Click-through rates surge from **3.25% to 58%**, nearly 20x higher because gifts create emotional relevance and a reason to act.



Conversion rates rise from **3% to 56%**, turning stalled conversations into real opportunities.



Response rates improve across the board with **+25%** for cold prospects, **56%** for personalized 1-to-1 sends, and 18% more demos attended when coffee is included.

Unforgettable sales gifting plays that win deals

Gifting isn't just nice: it grabs attention, reopens stalled conversations, and converts opportunities into revenue. Use Salesforce data to time each Reachdesk gift perfectly, keeping your brand top of mind while moving deals forward.

Here's a few plays that you start with today:

High-intent lead ignition

1. Salesforce trigger: Salesforce lead score or campaign engagement > 75

2. Reachdesk gift idea: "Fuel Your Ambition" kit with premium coffee blend, energy bars, and a sleek insulated tumbler



3. Messaging: "Saw your interest in [solution area]. Thought you might need some fuel while exploring your options. I'm here when you're ready to accelerate."

*Saw your interest in [solution area].
Thought you might need some fuel while exploring your options.
I'm here when you're ready to accelerate.*

Reachdesk

4. Why it works: Uses Salesforce data to time a gift that acknowledges their research phase and keeps your brand top of mind.

Stalled deal resurrection

1. Salesforce trigger: Opportunity stuck in Salesforce stage >14 days

2. Reachdesk gift idea: "Break Through" hammer tool with custom engraving, paired with gourmet nuts and a puzzle



3. Messaging: "Sometimes the best solutions require breaking through old thinking. Let's crack this together."

Sometimes the best solutions require breaking through old thinking. Let's crack this together.

Reachdesk

4. Why it works: Physical metaphor for momentum, with humor that reopens dialogue.

Competitor differentiation play

1. Salesforce trigger: Opportunity stage marked as "Evaluating Options" or Competitor field updated in Salesforce

2. Reachdesk gift idea: "Champions Choose Excellence" premium box with a personalized plaque, artisanal treats, and branded items



3. Messaging: "While you're weighing your options, remember champions don't just choose the cheapest path, they choose the one that leads to victory."

While you're weighing your options, remember champions don't just choose the cheapest path, they choose the one that leads to victory.

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4. Why it works: Elevates the value conversation above price, showcasing partnership.

Deal celebration & onboarding

1. Salesforce trigger: Opportunity closes as Won in Salesforce

2. Reachdesk gift idea:
“Partnership Launch Kit”
with champagne, gourmet chocolates, branded tech accessories, and onboarding roadmap



3. Messaging:
“Welcome to the family! Here’s to the incredible results we’ll achieve together.”

Welcome to the family! Here's to the incredible results we'll achieve together.



4. Why it works: Starts the relationship on a high note and reinforces service commitment.

Referral generation

1. Salesforce trigger: 90 days post-implementation, Salesforce Survey NPS 9-10

2. Reachdesk gift idea:
“Spread the Success”
sharing box with a batch of cookies, product or event discounts or referral incentives



3. Messaging: “Your success speaks volumes, we truly are a batch made in heaven. Know anyone else who could benefit from similar results?”

Your success speaks volumes, we truly are a batch made in heaven. Know anyone else who could benefit from similar results?

Reachdesk

4. Why it works: Turns Salesforce satisfaction data into referral opportunities.

💡 See cross-sell gifting in action: How SAP Concur Canada doubled their order

SAP Concur Canada wanted a creative way to engage newly signed customers and introduce add-on services that could drive cross-sell opportunities.

They launched two themed bundles to tie into the “add-on” concept. The first was an olive oil and balsamic vinegar set to showcase “the perfect add-on.” The second was a coffee kit with a branded mug and coffee packets, positioned as “the perfect pair.”

The campaign resonated so strongly that SAP Concur Canada doubled their initial order. What started as **100 bundles quickly scaled to 200**, amplifying reach and reinforcing the value of their broader product suite.



Key Salesforce x Reachdesk products for sales teams

<u>Salesforce sales tools help you sell smarter, and close faster</u>	<u>Reachdesk sales feature turn gifting into revenue</u>
Opportunity Management: Track every deal from first touch to close. Prioritize high-value opportunities, log calls and tasks, monitor competitor activity, and visualize your pipeline with Kanban boards so you always know what to do next.	Curated Marketplace: Access e-gifts and physical gifts from local vendors in 180+ countries, ensuring global reach with locally relevant options.
Contact & Lead Management: Keep all leads and contacts in one place. Access rich profiles, track interactions, and personalize outreach at scale, turning CRM data into timely, revenue-driving actions.	1-to-1 Sending: Send personalized gifts directly from Salesforce records with a single click, making every outreach instantly memorable.
Einstein Conversation Insights: Automatically transcribe calls, flag objections or competitor mentions, and capture next steps. Learn from top-performing reps with playlists of successful calls to replicate winning strategies across the team.	Opportunity Tracking via Reachdesk Insights: See exactly how each gift influences deal progression inside Salesforce opportunities to measure impact in real time.
Activity Timeline: See every interaction including tasks, calls, and events in a single, easy-to-scan feed. Filter, track, and follow up on the go with mobile access to keep deals moving forward.	Rep Performance Analytics: Compare gifting ROI across your team, identify what works best, and optimize outreach for maximum results.
Pipeline Reporting: Visualize your sales pipeline, forecast revenue accurately, and identify bottlenecks before they stall progress. Monitor trends, deal stages, and team performance to stay ahead of quota.	Approval Workflows: Keep budgets under control while empowering reps to send thoughtful, timely gifts without delays.



5x ROI \$600K in pipeline generated

“Reachdesk’s automation component saves us a ton of time on admin work, figuring out addresses, and sending out gifts one by one – and lets us focus on being creative marketers.”

Matthew Harrell, Director of Demand Generation, Clearwave

Read the story



80% increase in service response rate

“We are on a journey to integrate Agentforce seamlessly with our Service Cloud, providing our reps with instant access to comprehensive fan profiles and even generating on-brand replies that reps can send or edit. This will mean our fans are getting the support they need, faster and more personalised than ever before.”

Matte Kemp, Senior CRM and Customer Operations Manager, Formula 1

Read the story

How customer success teams turn reactive support into proactive partnerships with Salesforce x Reachdesk

How Salesforce x Reachdesk transforms customer relationships

Salesforce captures the data: health scores, usage trends, renewal dates. Reachdesk activates it by: celebrating milestones, rewarding advocacy, and reconnecting at-risk accounts with gestures that show real care.

The transformation includes:

-  Automated celebrations tied to Salesforce milestones that strengthen retention
-  Proactive appreciation that makes 70% of customers feel valued and builds loyalty
-  Memorable touchpoints that give 61% of customers a more positive view of your brand
-  Personalized gifting that reinforces value and turns customers into long-term advocates

Creative customer success gifting plays that build loyalty

Staying ahead in customer success isn't just about solving problems fast, it's about building relationships that last. Gifting gives you a way to celebrate wins, show appreciation, and re-engage at critical moments. Here's how you can turn Salesforce signals into unforgettable customer experiences today:

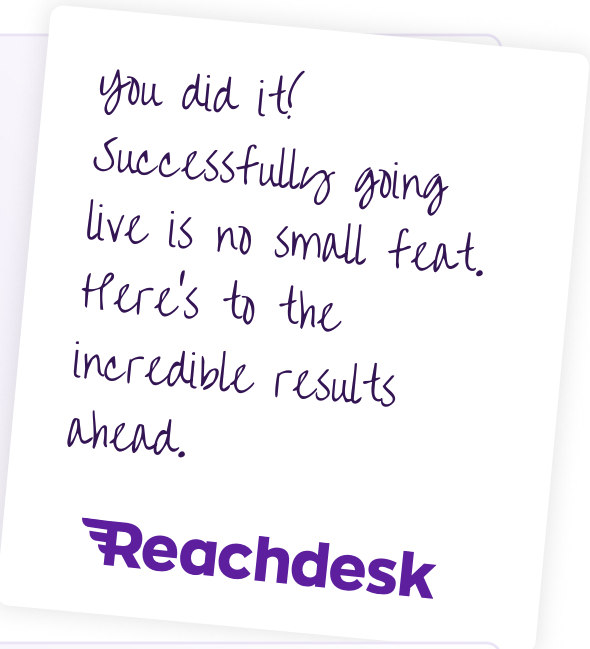
Onboarding/ implementation victory celebration

1. Salesforce trigger: Account reaches "Live" status in Salesforce

2. Reachdesk gift idea: "Victory Lap" celebration box with champagne and custom trophy



3. Messaging: "You did it! Successfully going live is no small feat. Here's to the incredible results ahead."



4. Why it works: Ties a Salesforce milestone to a memorable celebration.

Growth milestone recognition

1. Salesforce trigger: Usage increase >50% in Salesforce health metrics

2. Reachdesk gift idea: “Scaling New Heights” adventure kit with a travel mug, and custom portable charger



3. Messaging: “Your growth is inspiring! As you reach new heights, we’re here to support every step.”



4. Why it works: Reinforces your role as a growth partner.

Feature adoption incentive

1. Salesforce trigger: New features enabled but low usage in Salesforce data

2. Reachdesk gift idea: “Unlock Your Potential” puzzle box and content on feature



3. Messaging: “Great things happen when you unlock new possibilities. Let’s explore these features together.”



4. Why it works: Encourages feature adoption in a playful, engaging way.

Executive appreciation experience

1. Salesforce trigger: Renewal date within 6 months in Salesforce

2. Reachdesk gift idea: “Leadership Excellence” executive set with fine whiskey and premium leather goods



3. Messaging: “Great leaders recognize great partnerships. Thank you for trusting us.”



4. Why it works: Strengthens executive alignment ahead of renewal.

Advocacy program launch

1. Salesforce trigger: Salesforce NPS = 9–10, plus strong usage

2. Reachdesk gift idea: “Advocate Elite” premium package with a high-quality branded note-book, pen, noise-cancelling earbuds, and artisan chocolates



3. Messaging: “Your story inspires others. Ready to share your success and help other leaders?”



4. Why it works: Turns high satisfaction into advocacy momentum.

At-risk account re-engagement

1. Salesforce trigger: Usage decline of 25%, plus over 60 days in Salesforce health data

2. Reachdesk gift idea: “Reconnect & Refocus” care package with premium coffee beans, a branded mug or tumbler, and desk plant



3. Messaging: “We noticed you might be facing challenges. Let’s reconnect over coffee and refocus.”



4. Why it works: Uses Salesforce risk signals to reopen dialogue with empathy.

See executive customer engagement in action: How mindtickle® strengthened C-level relationships

Mindtickle wanted to engage their C-level executive customers in a focused product conversation while creating a memorable, high-touch experience.

They sent a curated bundle including earbuds, a wooden coaster, a collapsible water bottle, tech wipes, and a mango snack, all beautifully presented to be used during the virtual session.

The results were immediate. The campaign achieved a **65.6% redemption rate**, generated **29 opportunities**, and helped close 2 of them, reinforcing engagement and strengthening executive relationships.



Key Salesforce x Reachdesk products for customer success teams

<u>Salesforce customer success tools help you build loyalty and drive renewals</u>	<u>Reachdesk success tools help you deepen relationships and drive retention</u>
Customer 360: See health, usage, and engagement in one view. Give CSMs the full picture to drive proactive, personalized outreach.	Global Gifting Marketplace: Send curated gifts and eGifts anywhere in the world, with options tailored to every culture, preference, and budget.
Service Cloud: Resolve cases faster with AI-powered routing and knowledge surfacing, while keeping every interaction personal.	Gift Automation: Trigger perfectly timed gifts from Salesforce or your CRM for renewals, anniversaries, and customer milestones.
Experience Cloud: Build branded hubs where customers find answers, connect with peers, and fuel advocacy.	Address Confirmation: Skip the guesswork. Reachdesk confirms recipient details in real time so gifts always arrive where they should.
Renewal Management: Track contract timelines, trigger timely outreach, and reduce churn with predictable renewals.	Reachdesk AI-Powered Gift Notes: Personalize every message with AI-crafted notes that match your tone and customer context.
Health Unified Scoring: Get one score for risk and opportunity. Spot trends early and act on AI prompts to protect or expand accounts.	Insights & Success Metrics: Track gifting’s impact on NPS, retention, and expansion by directly connecting Salesforce. Connect sends to account health and renewal outcomes so your team can prove ROI and show how gifting drives measurable customer success.

How it works: Reachdesk x Salesforce

Connecting Reachdesk with Salesforce turns gifting into a measurable growth lever. From setup to activation to attribution, every send becomes smarter, more personal, and directly tied to revenue and retention.

Seamless data to action

One-click setup: Connect Reachdesk to Salesforce in minutes.

Full field access: Pull in Salesforce fields across leads, contacts, opportunities, and campaigns to personalize gifts.

Real-time sync: Gift activity instantly updates Salesforce records.

Bi-directional flow: Salesforce data powers gifts, while Reachdesk data enriches Salesforce for deeper insights.

Smarter campaign activation

Trigger automation: Launch sends when Salesforce fields change, like opportunity stage, lead score, or campaign membership.

Custom field integration: Personalize outreach using your unique Salesforce fields.

Campaign mapping: Track gift engagement as part of campaign member status.

Bulk execution: Send gifts at scale from Salesforce lists while keeping personalization intact.

Clear revenue attribution

Campaign influence integration: Show gifting’s role in Salesforce influence models.

Opportunity tracking: Measure how gifting impacts deal velocity and win rates with Reachdesk insights.

Revenue attribution: Connect gifts directly to closed-won deals with full audit trails.

Pre-built dashboards: Unlock 9+ Salesforce reports on gifting ROI.

A/B testing: Compare gifting strategies using Salesforce testing frameworks.

The result

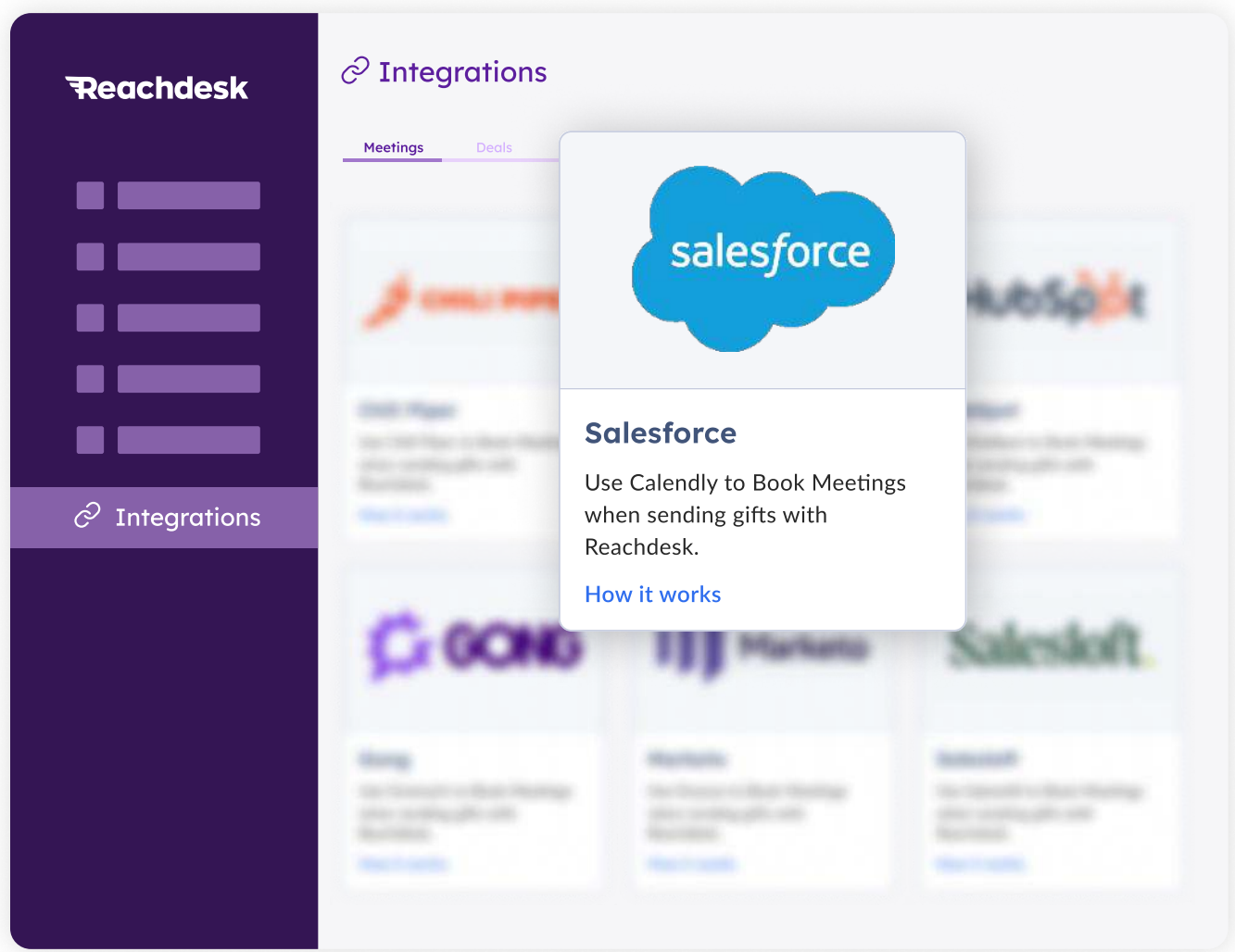
With Reachdesk and Salesforce working hand in hand, gifting isn’t just a nice touch, it’s a measurable driver of customer loyalty, pipeline velocity, and revenue growth.

Your revenue engine just got an upgrade

You’ve seen how it works. Now imagine it in motion. Salesforce powers the insights while Reachdesk delivers the moments that move deals forward. Together, they transform data into emotion and emotion into action.

This is where personalization scales without losing authenticity. Where every lead, opportunity, and renewal becomes a chance to stand out. With Salesforce and Reachdesk, you can cut through the digital noise, accelerate pipeline, and create experiences that convert customers into advocates.

The tools are ready. The data is in your hands. The time to start is now.



Turn prospects into delighted customers

Ready to see how Salesforce and Reachdesk can help you engage accounts with personalized, high-impact experiences?

Request a demo to discover how you can create unforgettable moments that drive pipeline and revenue.

Book a demo

Connect with a Reachdesk expert
at hello@reachdesk.com.



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