

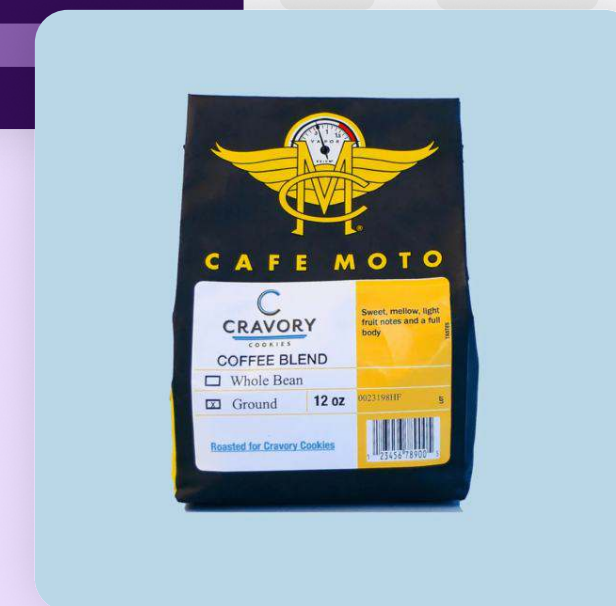
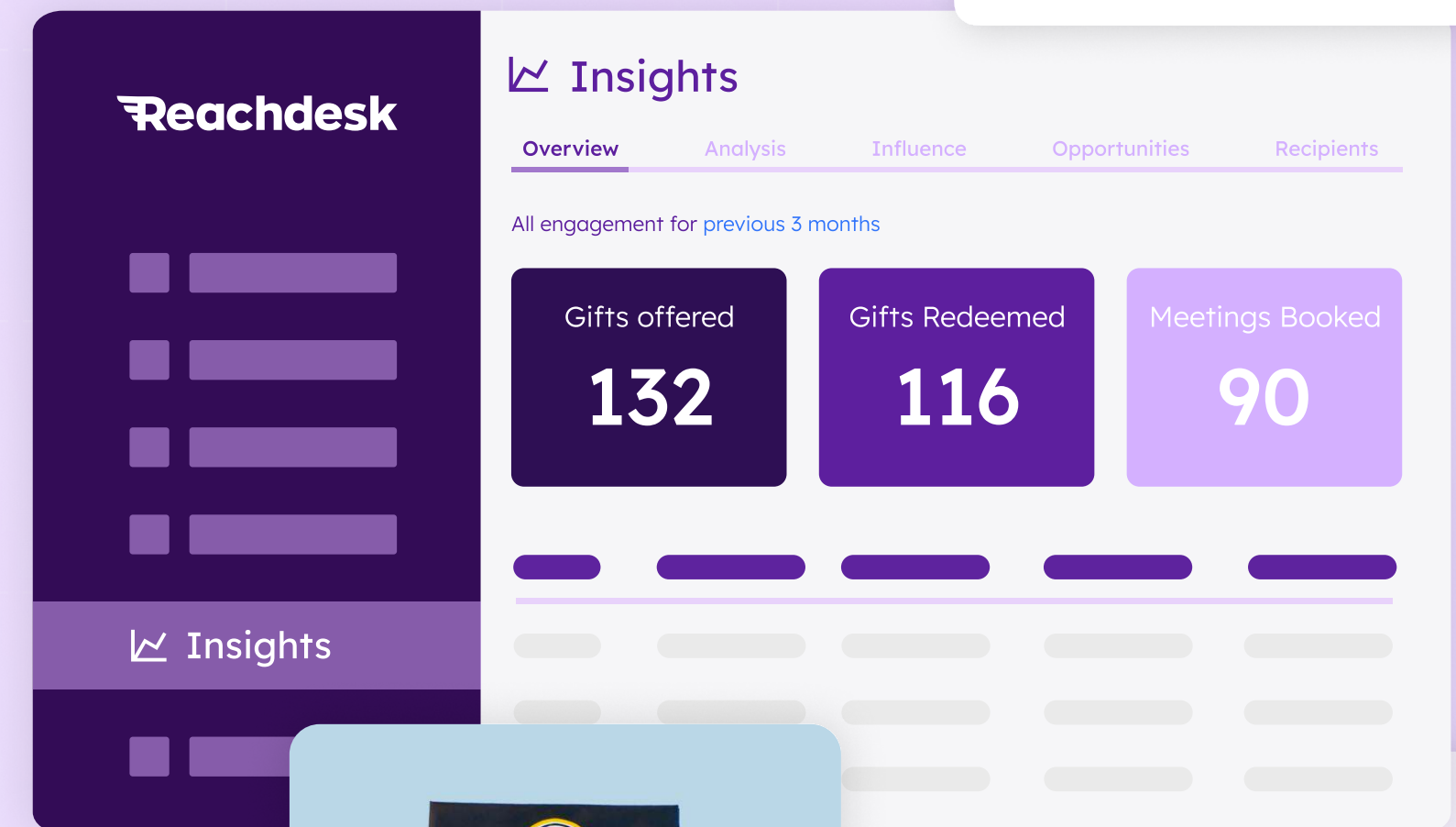


The customer growth playbook: How corporate gifting drives retention, adoption & revenue

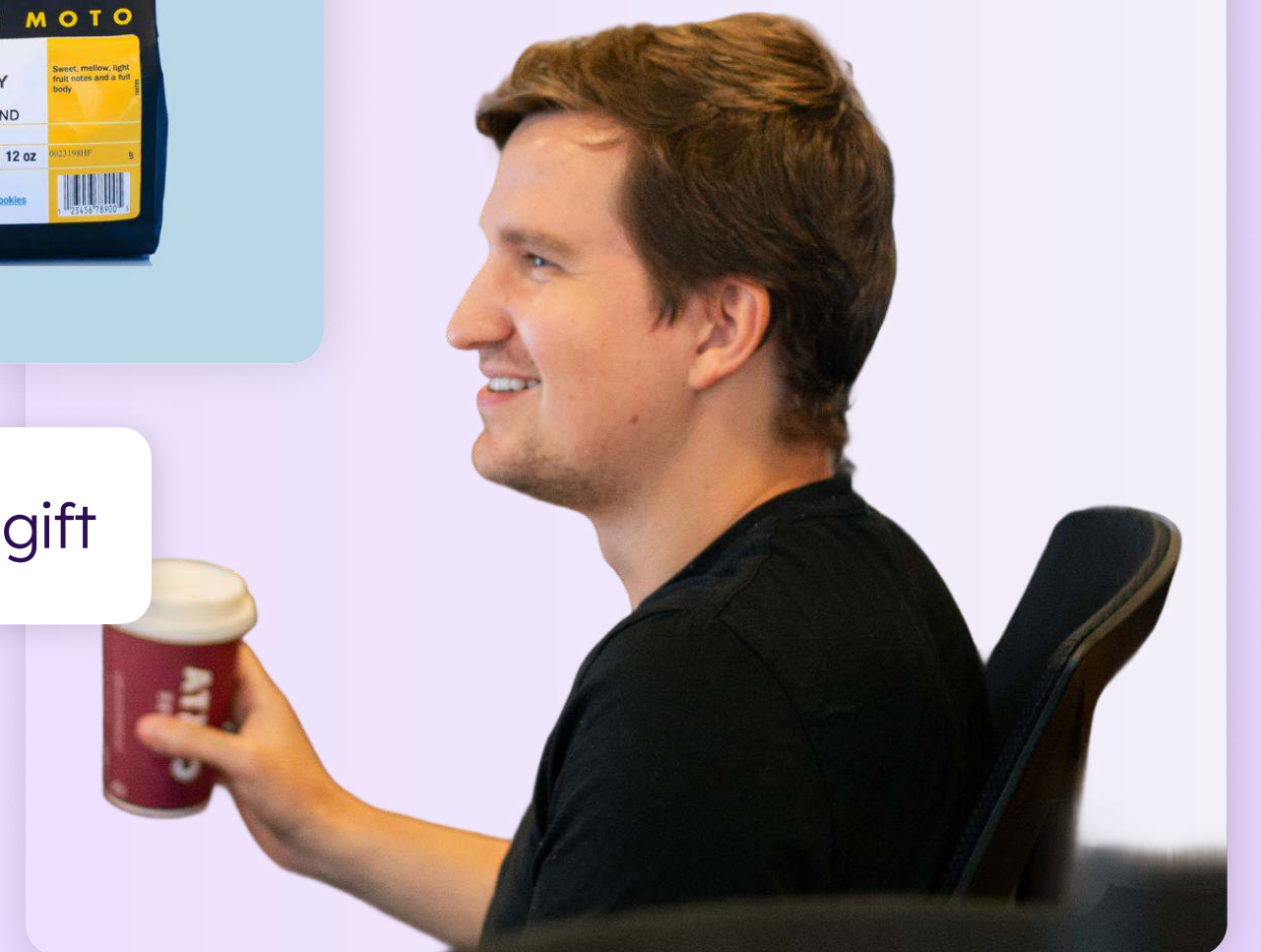
A comprehensive guide for customer
marketing & success teams

reachdesk.com

 **5X ROI** in year one



 **Alex** sent you a gift



Contents Page

Chapter 1

Introduction: Why customer marketing & success matter more than ever

3

Chapter 2

Top trends shaping customer loyalty today

4

Chapter 3

From firefighting to flourishing: The new era of customer success

6

Chapter 4

Why (and how) corporate gifting drives impact across the customer journey

7

Chapter 5

10 gifting plays to drive customer adoption, retention, and advocacy

9

Chapter 6

5 tips for building a scalable customer-first gifting strategy

13

Chapter 7

It's time to invest in your customer relationships with impactful gifts

15

Chapter 1

Introduction: Why customer marketing & success matter more than ever

The rules of growth have fundamentally changed. While B2B businesses once relied primarily on acquiring new customers to drive revenue, today's market realities demand a different approach.

The new growth reality:

- Customer Acquisition Cost (CAC) has increased by [222%](#) over the past 8 years across industries
- Net Revenue Retention (NRR) has emerged as the most predictive metric for long-term success
- Companies with NRR above 110% grow [2.5x faster](#) than those below 100%
- [73%](#) of B2B revenue now comes from existing customers through expansion and retention

This shift isn't just a trend, **it's a necessity**. In an environment where acquiring new customers costs more and takes longer, the companies that thrive are those that excel at growing their existing customer base.

The customer success opportunity (that most miss)

Strong customer success and marketing programs are no longer nice-to-haves; they're revenue engines. Companies with strong customer success programs see:

[91%](#)

ROI over three years by boosting customer lifetime value

More

revenue through upsell and cross-sell opportunities

[60%](#)

higher profit margins from customer-centric strategies

Yet most customer teams still operate reactively, responding to problems rather than creating moments of delight. This ebook will show you how strategic gifting and swag can transform your customer relationships from transactional to transformational.



“By gifting to our most active community members, we show that we see them and appreciate their continued engagement.”

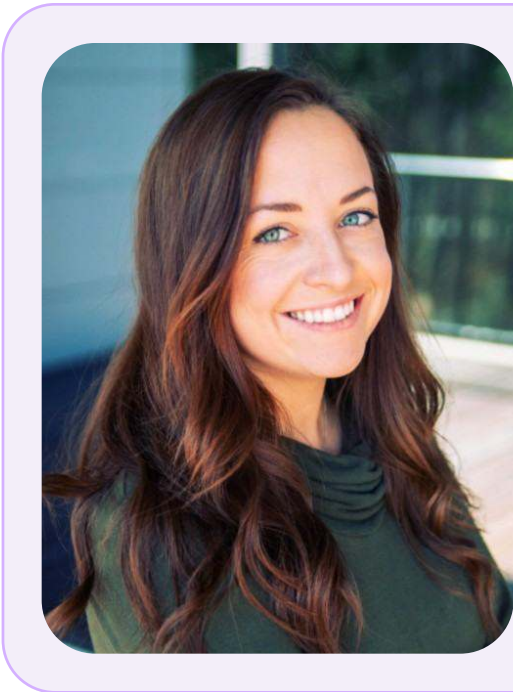
[Leslie Barrett](#), Director, Customer Marketing at Tipalti

Top trends shaping customer loyalty today

Understanding the landscape is crucial for building an effective customer strategy. Here are the key trends reshaping how successful companies engage their customers:

1. Customer-led growth dominates

Companies that grow their customers grow themselves. Data shows that businesses with net revenue retention (NRR) over 120% are valued [twice as high](#) as those below 110%. In addition, companies with [120% NRR](#) can double revenue every five years without adding a single new customer. That’s why you need to treat every existing customer as a gateway to expansion. By helping them succeed, encouraging referrals, and turning them into advocates, your customers become more than users, they become the engine that drives your growth.



“The greatest mistake a company can make (and surprisingly common) is delaying investment in customer marketing. Winning the deal is just the beginning – sustainable growth comes from guiding customers through every milestone that follows. From onboarding to renewal, each experience decides whether they expand with you or drift away. Put real care into the journey, and expansion becomes the natural outcome.”

[Chelsey Axline](#), Director, Customer Marketing @ SOCi

2. Personalization and human connection win

Customers remember how you make them feel. [Eighty percent](#) say the experience a company provides is as important as the product itself, yet only 29 percent of companies consistently make it personal. Every interaction is an opportunity to stand out. By creating moments that feel thoughtful and human, you build loyalty, strengthen relationships, and set yourself apart from competitors who rely on generic check-ins.

“I’ll die on the hill of high-touch programs over mass marketing. Scale is crucial – it keeps the journey moving – but more people in the program doesn’t mean more impact. The magic happens when you step away from the demand-gen numbers game and create space for segmented, high-touch programs that deliver real value. Nobody remembers the webinar with a hundred people; they remember the roundtable where they built connections and gained insights that lasted. That’s where advocacy is born.”

[Chelsey Axline](#), Director, Customer Marketing @ SOCi

3. Proactive customer success drives revenue

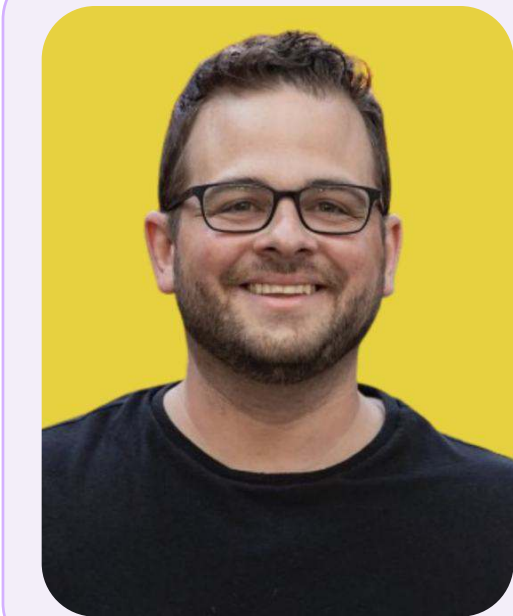
The best customer success and marketing teams don’t wait for problems, they act before they appear. They celebrate wins, identify opportunities early, and turn satisfied clients into advocates. By anticipating needs and nurturing relationships, these teams don’t just protect revenue: they grow it. Every proactive action becomes a chance to deepen trust and unlock expansion.

4. Data-informed engagement

Data is only valuable when it guides action. Teams that track usage, engagement, health indicators, and expansion signals know where to focus their time. By acting on insight, every conversation becomes meaningful, every opportunity is captured, and customer relationships grow stronger.

5. Moments that matter build loyalty

Some moments matter more than others. Product milestones, business wins, team changes, renewals, and expansion conversations are chances to connect, celebrate, and reinforce trust. Recognizing these moments and acting on them turns routine touchpoints into meaningful experiences that deepen relationships and drive growth.



“Customer loyalty isn’t built in big flashy campaigns, it’s built in the small, human moments that show you care. When a customer hits a milestone, closes a deal, or even goes through a tough change, that’s your chance to lean in. Celebrate with them. Support them. Remind them you’re in it together. Those are the moments that stick. They turn a vendor into a partner, and a product into a trusted part of someone’s journey.”

[Nick Bennett](#), Founder at NB Marketing



From firefighting to flourishing: The new era of customer success

The most successful customer organizations have fundamentally reimaged their role. Instead of waiting for customers to reach out with problems, they proactively create value and memorable experiences.

The old way: Reactive support	The new way: Proactive experiences
✖ Focus: Problem-solving and firefighting	✔ Focus: Growth enablement and relationship building
✖ Touchpoints: Customer-initiated support requests	✔ Touchpoints: Strategic, value-driven interactions
✖ Metrics: Response time, resolution rate, satisfaction scores	✔ Metrics: NRR, expansion rate, advocacy generation, customer lifetime value
✖ Outcome: Customer retention through issue resolution	✔ Outcome: Customer growth through continuous value creation

Shifting from reactive support to proactive experiences changes the way customer teams engage. But being proactive isn’t only about showing up early, it’s about finding meaningful ways to connect that build trust and drive growth.

That’s where corporate gifting and swag fits in

Strategic gifting and swag are a powerful tool for proactive customer teams because they allow you to:

**Create touchpoints:**
Instead of waiting for reasons to connect, gifts give you opportunities to reach out and reinforce relationships.

**Show appreciation:**
Recognize customers for their success, partnership, and loyalty in tangible ways that go beyond digital tactics and engage all five senses.

**Generate reciprocity:**
The psychological principle of reciprocity means customers are more likely to engage positively when they've received something valuable.

**Stand out:**
While your competitors send emails, you create unforgettable physical and digital experiences.

**Align with GTM strategy:**
Gifting supports broader go-to-market objectives by nurturing relationships that lead to expansion, retention, and referrals.

Keep reading to explore the psychology of gifting and discover proven customer success and marketing plays you can put into action today.



15% increase in meeting show rates

“When we first started using Reachdesk, we saw a 15% increase in meeting show rate. More shows equals more deals so that directly impacts our bottom line.”

Kiera Griffis, Marketing Campaign Manager, BILL Spend & Expense

Read the story

Why (and how) corporate gifting drives impact across the customer journey

Gifting isn't just a nice gesture, [it's a strategic tool backed by psychology](#) and proven results. When done thoughtfully, gifting creates emotional connections that translate directly into business outcomes.

The psychology behind corporate gifting

**Reciprocity principle:**
When someone receives a gift, they feel psychologically compelled to reciprocate. In business relationships, this translates to increased engagement, loyalty, and willingness to provide referrals or testimonials.

**Recognition and appreciation:**
Personalized gifts signal that you notice and value your customers' success. This recognition strengthens their emotional connection to your brand and makes them feel like true partners rather than just accounts.

**Belonging and community:**
Thoughtful gifts make customers feel like insiders, part of an exclusive community, that values their partnership. This sense of belonging increases loyalty and reduces churn risk.

And the impact is clear: the psychology behind gifting translates into measurable business results.

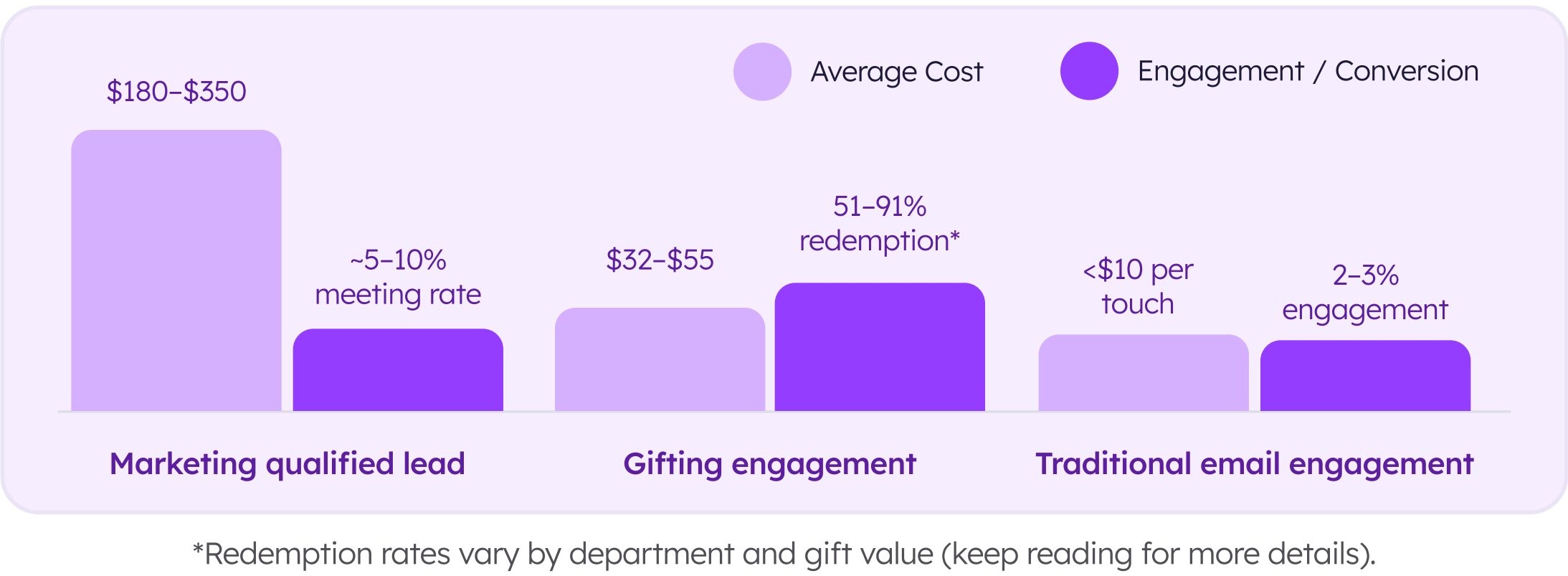
How gifts amplify your business's impact

A thoughtful gift can transform how customers perceive your brand. [Seventy percent](#) of customers feel more valued when receiving a gift, 61% develop a more positive view of brands that send them, and personalized gifting significantly boosts retention.

That positive perception doesn't stop at feelings: it drives engagement and revenue growth. Executive sponsors engage at a 49% rate in ABM campaigns, response rates jump 56% for personalized 1-on-1 sends, event attendance rises 76% when gifts are involved, and post-event meetings increase fivefold.

And it's affordable too. [Reachdesk's State of Gifting report data shows](#) that a \$20-\$50 thoughtful gift can outperform a six-figure outbound campaign. The key isn't spending more, it's spending smarter: targeting the right people at the right time.

Cost and engagement comparison between gifting and other customer marketing channels



That means a single \$50 gift can help unlock a six-figure deal. That's not spending, it's investing. Even modest gifts, when used thoughtfully, deliver outsized returns, creating a strategic advantage and maximizing the impact of your go-to-market spend.

10 gifting plays to drive customer adoption, retention, and advocacy

You’ve seen how thoughtful gifting can influence perception, engagement, and revenue at every stage of the customer journey. Now it’s time to put it into action. Below, we outline specific, actionable gifting plays for each stage of the customer lifecycle. Each play includes timing, execution tips, gift ideas, messaging examples, and the strategic rationale behind it, so you can create meaningful connections that drive real results.

1. Gifting plays to welcome new clients and drive adoption

Play 1 A: The welcome experience

1. When to use: New customers within their first 30 days.

3. Gift ideas: Branded hot sauce, artisanal coffee sampler, custom notebook, gourmet snack box.



5. Why it works: Creates a tangible reminder of your partnership and investment in their success.

2. How it works: Celebrate initial onboarding milestones with a gift that reinforces excitement and partnership.

4. Messaging idea: “Welcome to [Company]! Let’s spice things up together. Here’s a little gift to kickstart your journey with us.”



Play 1 B: New champion welcome

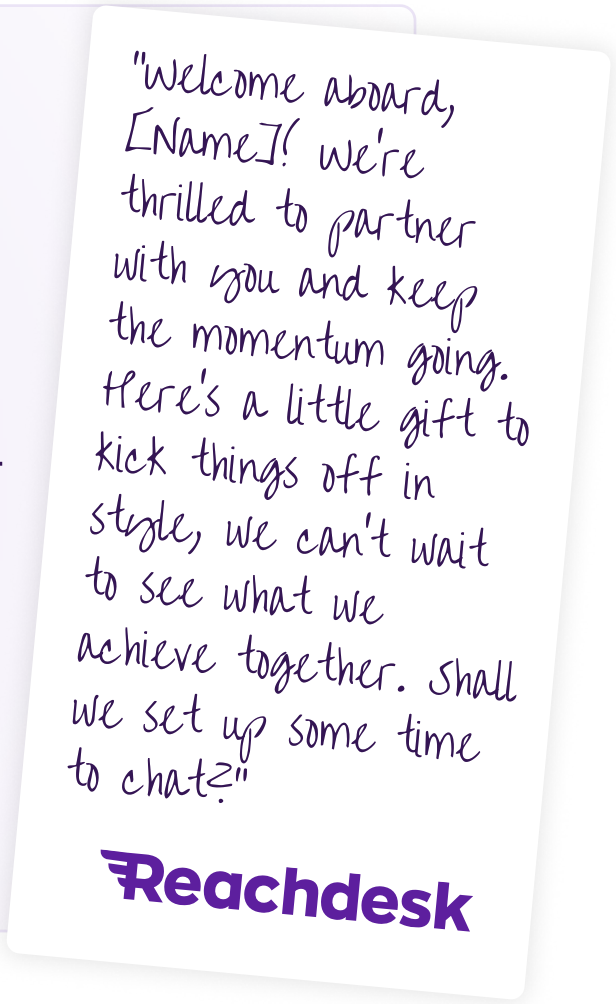
1. When to use: When a key champion leaves the company and a new stakeholder takes ownership of your product.

2. How it works: Rebuild the relationship by introducing yourself, demonstrating value, and celebrating the partnership with the new decision-maker.

3. Gift ideas: A welcome bundle featuring a branded Stanley or Yeti tumbler, personalized AirPods Pro case, brand Echo Dot, and custom cupcakes with either their logo or your company’s logo.



4. Messaging idea: “Welcome aboard, [Name]! We’re thrilled to partner with you and keep the momentum going. Here’s a little gift to kick things off in style, we can’t wait to see what we achieve together. Shall we set up some time to chat?”



5. Why it works: Combines practical, premium, and playful elements to make a lasting first impression. Establishes rapport, reinforces your company’s value, and helps the new champion feel recognized and excited about the partnership.

Play 2: Milestone momentum

1. When to use: Customers achieve key adoption milestones.

3. Gift ideas: Mini personalized trophy, branded puzzle cube, popcorn kit for the team.



5. Why it works: Celebrating wins keeps momentum high and reinforces the value they're gaining.

2. How it works: Celebrate their first big wins to reinforce progress and encourage continued engagement.

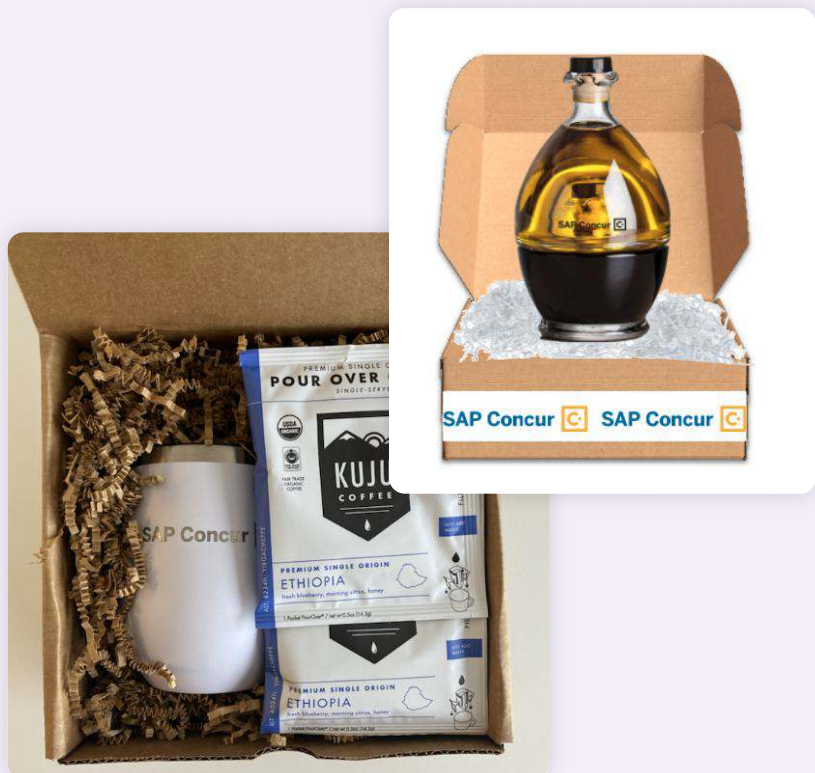
4. Messaging idea: "You just crushed [milestone]! Here's a little trophy to mark the moment. Ready for the next win?"

You just crushed [milestone]! Here's a little trophy to mark the moment. Ready for the next win?

Reachdesk

 See customer gifting in action: How SAP Concur Canada drove cross-sell opportunities

SAP Concur Canada wanted to engage new customers while promoting their "Add On" services with Reachdesk. They sent two themed bundles: an olive oil and balsamic vinegar set to showcase "the perfect add on" and a coffee kit with a mug and coffee packets to highlight "the perfect pair." The campaign was so well received that they doubled their original order.



2. Gifting plays to celebrate brand and product engagement

Play 3: Power user recognition

1. When to use: Customers consistently use advanced features.

3. Gift ideas: Personalized bobblehead, premium wireless headphones, custom desk organizer.



5. Why it works: Reinforces positive behavior and turns users into internal champions.

2. How it works: Reward power users to recognize mastery and inspire advocacy.

4. Messaging idea: "You've officially leveled up on [Product]! Here's a little something to celebrate your mastery."

You've officially leveled up on [Product]! Here's a little something to celebrate your mastery.

Reachdesk

Play 4: Feature launch excitement

1. When to use: Launching new features or products.

3. Gift ideas: Smart gadget, branded puzzle, neon desk lamp, champagne with personalized flutes.



5. Why it works: Makes customers feel like insiders and increases adoption of new features.

2. How it works: Make select customers feel like VIPs and early adopters.

4. Messaging idea: "You are among the first to try [Feature]! Here's a little tech twist to celebrate being ahead of the curve."

You are among the first to try [Feature]! Here's a little tech twist to celebrate being ahead of the curve.

Reachdesk

💡 **See customer marketing in action: How mindtickle® engaged C-level executives**

Mindtickle designed a campaign with Reachdesk for C-level executives to support a two-hour product-focused conversation. Customers received a curated bundle including earbuds, a wooden coaster, a collapsible water bottle, tech wipes, and a mango snack in a beautifully presented box. The campaign achieved a **65.6% redemption rate** and generated **29 opportunities**.



Play 6: Year-in-review impact package

- 1. When to use:** End of year or renewal time.
- 2. How it works:** Combine data-driven insights with meaningful mementos to showcase impact.
- 3. Gift ideas:** Custom photo book, framed infographic of achievements, personalized champagne kit.
- 4. Messaging idea:** “What a year! Here’s a keepsake to celebrate everything you’ve accomplished, and everything yet to come.”
- 5. Why it works:** Creates emotional connection through recognition and supports renewal.



What a year! Here's a keepsake to celebrate everything you've accomplished, and everything yet to come.

Reachdesk

3. Gifting plays to boost retention & renewal

Play 5: Pre-renewal partnership reinforcement

- 1. When to use:** 60–90 days before renewal conversations.
- 2. How it works:** Highlight partnership value and celebrate achievements before renewal.
- 3. Gift ideas:** Spa kit, personalized calendar, growth-themed desk plant.
- 4. Messaging idea:** “Here’s a little gift to celebrate the growth we’ve achieved together. Here’s to thriving in the year ahead.”
- 5. Why it works:** Builds positive momentum ahead of renewal conversations.



Here's a little gift to celebrate the growth we've achieved together. Here's to thriving in the year ahead.

Reachdesk

4. Gifting plays for encouraging expansion & advocacy

Play 7: Group reference events

- 1. When to use:** When building customer advocacy or sourcing referrals.
- 2. How it works:** Invite advocates and prospects to an exclusive event where customers share success stories.
- 3. Gift ideas:** Choose gifts that align with the event theme. For example, send event swag (branded items like notebooks or water bottles) or interactive virtual gifts with QR codes.
- 4. Messaging idea:** “You’re invited to our exclusive [Event]! Here’s a little preview gift. We can’t wait to celebrate and share stories with you.”
- 5. Why it works:** Turns advocates into storytellers, creating social proof and referrals.



You're invited to our exclusive [Event]! Here's a little preview gift. We can't wait to celebrate and share stories with you.

Reachdesk

Play 8: Referral driver

1. When to use: Quarterly or when reviews are over 90 days old.

2. How it works: Encourage refreshed reviews with a thoughtful thank-you gift.

3. Gift ideas: Freshly baked cookies, gluten-free snack box, charity donation under their name.



4. Messaging idea: "Fresh cookies for a fresh review! We'd love your updated perspective on [Product]."



5. Why it works: Boosts credibility with updated social proof while strengthening customer engagement.

Play 10: Holiday and cultural celebrations

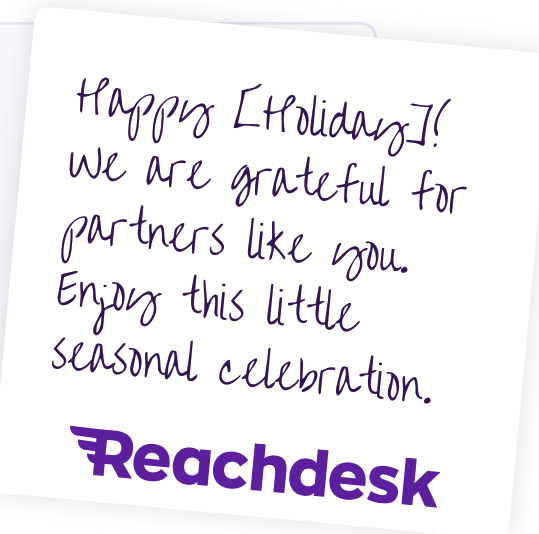
1. When to use: Major holidays or cultural events.

2. How it works: Send thoughtful, culturally appropriate gifts to show understanding and appreciation.

3. Gift ideas: Branded puzzle, seasonal hot chocolate set, artisanal holiday treats, mindfulness kit.



4. Messaging idea: "Happy [Holiday]! We are grateful for partners like you. Enjoy this little seasonal celebration."



5. Why it works: Builds warm associations with your brand during meaningful personal moments.

5. Gifts to celebrate the special “moments that matter”

Play 9: Personal and professional milestone recognition

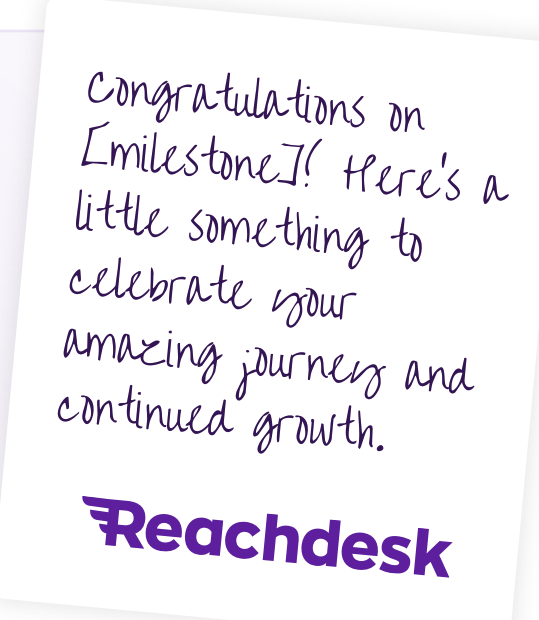
1. When to use: Customers experience personal or professional milestones.

2. How it works: Track milestones and send gifts that celebrate achievements in a meaningful way.

3. Gift ideas: Celebratory champagne kit, neck massager, voucher to an exclusive retail store.



4. Messaging idea: "Congratulations on [milestone]! Here's a little something to celebrate your amazing journey and continued growth."



5. Why it works: Creates deep emotional connections that build lasting loyalty.

💡 See customer gifting in action: How **Udemy**™ celebrated global partnerships with a holiday campaign

Udemy wanted to send a thoughtful holiday gift to celebrate their global customers and embrace the holiday spirit inclusively. The “Mindful Moment” bundle focused on relaxation and well-being and included a branded Yeti tumbler, Yeti mug, diffuser, mindfulness cards, and a custom gift box with a warm note. A total of **240 bundles were sent globally**, creating a memorable and high-quality experience for recipients.



5 tips for building a scalable customer-first gifting strategy

Creating a gifting program that actually drives impact takes more than good intentions. If you want your gifts to feel personal, meaningful, and strategic, you need a plan that scales, tracks results, and delights customers at every stage. Here's how to build a customer-first gifting program that works.

1. Personalization at scale

The biggest challenge with gifting at scale is making every recipient feel like the gift was chosen just for them. When you are managing hundreds or thousands of accounts, it's easy for gifts to feel generic and impersonal. The solution is to combine technology, data, and a thoughtful approach. By connecting your gifting platform like [Reachdesk](#) to your CRM, you can automatically trigger gifts based on lifecycle stage, customer behavior, and preferences. Product usage data and past interactions can inform not just what you send, but when you send it.

Be intentional with your selections by choosing gifts that resonate with the customer's role, industry, or company size. Reinforce the connection in your messaging by referencing achievements, milestones, or shared experiences. Over time, this approach allows even large-scale gifting to feel thoughtful and tailored.

2. Timing is everything

Even the most impressive gift loses its impact if it arrives at the wrong moment. Gifting success depends on timing. Some gifts should respond to customer actions, like sending a congratulatory package right after a major milestone, onboarding completion, or a successful go-live. Others are proactive, anticipating needs such as renewal conversations or industry events. Seasonal and cultural timing also matters: sending a gift for a local holiday, company anniversary, or personal milestone shows attentiveness and care.



Avoid common timing mistakes: don't send gifts during a customer crisis, and avoid generic holiday timing that feels rushed or impersonal. Even small adjustments in timing can make your gifts far more memorable and impactful.

3. Track ROI to turn gifting into a strategic investment

A successful gifting program doesn't just make customers feel valued, it drives measurable business outcomes. Gifts can influence engagement, from response rates and meeting acceptances to product usage and adoption, and impact retention, expansion, and advocacy. Tools like [Reachdesk Insights](#), alongside your CRM, make it easy to track and analyze these results, turning each gift into a strategic, data-driven investment.

Key metrics to monitor:

 Direct response:

Open and response rates for gift-accompanied outreach, meeting acceptance, engagement before and after gifts

 Business impact:

Net revenue retention, renewal rates, expansion revenue, referrals and their quality

 Relationship health:

Executive engagement, product usage, support ticket trends, contract values

 Advanced analysis:

Multi-touch attribution, cohort comparisons, lifetime value including gifting costs

Set up tags in your CRM, create custom fields for responses, and automate dashboards to monitor performance. Over time, these insights reveal which gifts and moments have the biggest impact, helping you scale programs that delight customers and grow your business.

4. Avoid common pitfalls

Many programs fail because companies rely on generic items or send gifts sporadically. Avoid cheap or inappropriate items, and always consider cultural sensitivities. Gifts should be paired with meaningful outreach and follow-up conversations to reinforce the relationship.

Most importantly, establish metrics upfront so you know whether your program is truly delivering value. When done right, gifting becomes more than a touchpoint, it's a driver of loyalty, advocacy, and growth.



“If you send a gift and don’t follow up, you’re missing a huge opportunity to keep the conversation going.”

[Katlin Hess](#), Director of Customer Marketing at G2

5. Building a scalable technology stack

Scaling a gifting program starts with the right tools. Platforms like [Reachdesk](#) integrate with your CRM, manage inventory, support international shipping, and allow personalization. Automation, data-driven recommendations, and ROI tracking make programs efficient and measurable.

Small CS and customer marketing teams can deliver high-impact gifts with thoughtful playbooks and automation. As teams grow, introduce workflows, segmentation, and regional or cultural customization to keep every gift strategic, compliant, and personal. Enterprise teams can scale further with centers of excellence and advanced attribution, ensuring every gift feels meaningful no matter the audience size.



\$10M+ in influenced pipeline and **\$70M+** in progression from just three campaigns

“With Reachdesk, it’s not just about sending gifts. It’s about creating experiences that move the needle.”

[Kaleigh Wright](#), Demand Generation Specialist, Workhuman

[Read the story](#)

It's time to invest in your customer relationships with impactful gifts

Customer relationships are the backbone of growth, and thoughtful gifting is one of the simplest ways to strengthen them. Every well-timed, meaningful gift shows that you see your customers, value their success, and are invested in growing together.

Start small and focus on moments that matter. A carefully chosen gift paired with a personal message creates a lasting impression, deepens loyalty, and opens doors for future conversations. Tools like [Reachdesk](#) make it easy to scale these experiences, manage global sends, and ensure every interaction is strategic and personal.

The choice is clear. You can either wait and hope your customers feel valued, or you can act now and create memorable experiences that turn them into champions for your brand.



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), SentinelOne

Read the story



Ready to turn every customer interaction into growth?

[Book a Reachdesk demo](#) today and start creating meaningful experiences that drive loyalty and revenue or message us at hello@reachdesk.com if you have any questions.

Book a demo



reachdesk.com