

## Gift Masters



Replay



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# The ultimate corporate gifting playbook for customer success

Corporate gifting isn't just about sending presents—it's a strategic tool that can enhance customer success. Companies that use gifting to drive customer attention and renewals see a **43% increase in results.**

We spoke with Customer Marketing pros **Leslie Barrett** from Tipalti, and **Katlin Hess** from G2 to uncover their top gifting strategies for strengthening customer relationships. This playbook offers actionable tips and gifting plays designed to engage customers, boost retention, and fuel advocacy to drive long-term results.

Ready to take your gifting strategy to the next level? Let's dive in! Or catch up with the Gift Masters episode by clicking the button below.

Replay Gift Masters 

### What's inside:



**8 gifting tips checklist:** Proven strategies to drive renewals and strengthen customer relationships, inspired by our Customer Marketing pros.



**Gifting plays to inspire you:** 6 impactful campaigns to boost engagement, retention, and advocacy—ready for you to implement today.



## 8 gifting tips to drive renewals and strengthen customer relationships

You already know that corporate gifting can be a game-changer in your customer success strategy. Use this checklist to make your gifting efforts more impactful and achieve your customer growth goals—from engagement to long-term retention.

### 1. Strategy & planning: The foundation of gifting success

A well-planned gifting strategy ensures your efforts are timely, relevant, and impactful, helping you stand out and build deeper connections.

- ✓ **Align gifting with customer milestones:** Map out key touchpoints like onboarding, renewals, big wins, or anniversaries to deliver timely gifts that resonate.
- ✓ **Use automation for efficiency:** Use platforms like [Reachdesk](#) to automate personalized gifting at scale, saving time while maintaining a personal touch.
- ✓ **Tier your approach:** Reserve premium gifts for VIPs and tailored bundles for other segments. This ensures every recipient feels valued.
- ✓ **Find hidden gifting moments:** Think beyond the obvious. Celebrate learning milestones or personal events to stand out.

### 2. Personalize, personalize, personalize

Customer gifting is most powerful when it feels personal. A thoughtful, tailored gift shows you understand and value the recipient as an individual.

- ✓ **Let data guide your choices:** Monitor behavioral data and customer milestones to tailor gifts that align with recipients' preferences and past interactions.
- ✓ **Add a creative twist:** Incorporate fun or brand-aligned items that surprise and delight. Something as simple as a branded pillow could go viral because it made a lasting impression!
- ✓ **Always include a thoughtful note:** A simple, handwritten message adds authenticity and makes the gift more meaningful.

### 3. Follow-up: Don't drop the ball

A gift is just the start of a conversation. Following up ensures you capitalize on the goodwill created and drive meaningful engagement.

- ✓ **Close the loop:** After sending a gift, follow up to check in, drive conversations, or share helpful content.
- ✓ **Double-down on accessibility:** If using QR codes or digital links, email the same content to ensure recipients can engage easily.



*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](#)

### 4. Advocacy & referrals: turn customers into brand ambassadors

Your advocates and referrers are your biggest champions. Gifting can amplify their loyalty and incentivize them to spread the word, so use it!

- ✓ **Incentivize advocacy:** Launch programs with exciting gifts like personalized bottles of their favorite drink or exclusive swag to encourage participation.
- ✓ **Make referrals memorable:** Use thoughtful gifting to thank customers who refer others and create a standout experience.
- ✓ **Celebrate achievements:** Recognize advocates with physical gifts for milestones like completing certifications or adopting new features in your platform.



## 5. Measuring success: prove gifting ROI

To maximize ROI, you need to know what works. Measuring gifting impact helps you refine your strategy and justify your investment.

- ✓ **Track your impact:** Use tools like [Reachdesk](#) to monitor when gifts are delivered and how recipients respond.
- ✓ **Tie gifting to KPIs:** Link your efforts to measurable outcomes like engagement, pipeline acceleration, or retention.
- ✓ **Monitor long-term engagement:** Track how gifting contributes to long-term relationships and retention, not just immediate responses. For example, tracking the post-gifting touchpoints allows you to see how sustained engagement plays a role in renewal discussions.

## 6. Holiday & seasonal gifting: Spread the joy

The holidays are a prime time for gifting, but success comes from planning ahead and making your gifts feel special.

- ✓ **Plan early and tier your strategy:** Develop a festive gifting plan that feels thoughtful, not rushed. Remember to reserve high-end gifts for VIPs and curated bundles for broader audiences.
- ✓ **Make it special:** Use seasonal packaging and holiday-themed messaging to create a memorable unboxing experience.
- ✓ **Think globally:** Acknowledge seasonal differences, like summer-themed gifts for customers in Australia during the holidays.

**Want more holiday gifting ideas?**  
Check out our [holiday gifting guide](#).

## 7. Community & education: Build bonds that last

Gifting is a great tool for strengthening community engagement and rewarding educational milestones to foster loyalty and excitement.

- ✓ **Celebrate learning milestones:** Reward product adoption achievements and certifications with physical gifts alongside digital badges.
- ✓ **Engage community advocates:** Keep advocates motivated with small, thoughtful tokens of appreciation.
- ✓ **Show appreciation for ongoing participation:** Surprise long-term community members with unexpected gifts or exclusive perks to reinforce their value to your brand.



*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](#)



## 8. Creativity & impact: Dare to be different

Memorable gifting stands out. By thinking outside the box, you can create gifts that surprise, delight, and stick with recipients.

- ✓ **Experiment with bold ideas:** Choose gifts that make a statement or tell a story. Unique branded items or creative themed bundles can leave a lasting impression.
- ✓ **Focus on experiences:** Think beyond physical items—offer memorable experiences like dinner credits, event passes or host virtual experiences.
- ✓ **Embrace happy accidents:** A gifting “oops” that resonates can become your next big idea.



## 6 gifting plays to drive engagement and strengthen relationships

Now let's put the tips into action! Here are 6 powerful gifting plays to drive engagement, strengthen relationships, and achieve lasting results.

### 1. Review and refresh: 🔄 reviews campaign

**Objective:** Refresh old reviews and encourage new ones.

**How to run it:**

- ✓ **Identify and target stale reviews:** Use platforms like G2 to find reviews older than 90 days (or longer, depending on your sales cycle).
- ✓ **Send a 'Fresh Cookies for a Fresh Review' gift:** Delight customers with a small, thoughtful gift like cookies (or gluten-free alternatives). Pair it with a friendly note asking them to update their review—make it feel like a genuine thank you, not a sales pitch.
- ✓ **Include a call to action:** Provide direct links to review platforms and encourage recipients to refresh their feedback.
- ✓ **Use social sharing:** Include a prompt for recipients to share the gift with colleagues to expand your review refresh efforts.

### 2. Celebrate customer milestones

**Objective:** Acknowledge and celebrate key customer milestones with personalized gifting.

**How to run it:**

- ✓ **Track milestones:** Use CRM data to track key customer lifecycle moments like product adoption, renewals, anniversaries, or team achievements.
- ✓ **Choose milestone-appropriate gifts:** Tailor the gifts to the specific milestone (e.g., product adoption: tools for enhancement; renewals: a thank-you gift; team achievements: experiences or collaborative gifts).
- ✓ **Personalize the message:** Make the note feel personal and meaningful by celebrating the milestone.
- ✓ **Send at the right time:** Ensure gifts arrive close to the milestone to maximize their impact.



### 3. Drive customers to attend your events

**Objective:** Encourage event attendance and boost participation through gifting.

**How to run it:**

- ✓ **Pre-event gifting:** Send a gift ahead of time to customers or prospects you'd like to attend your event.
- ✓ **Tie the gift to the event:** 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.
- ✓ **Create FOMO:** Use messaging like “Can’t wait to see you at [Event Name]—here’s a sneak peek” to build anticipation.
- ✓ **Post-event follow-up:** Send a thank-you gift after the event to nurture the relationship further.

### 4. Group reference events: Engage advocates and drive referrals

**Objective:** Use group reference events to empower customers to share their success stories and refer new prospects.

**How to run it:**

- ✓ **Identify advocates:** Find loyal customers likely to provide valuable references, such as those who have shared success stories or are highly engaged.
- ✓ **Invite to exclusive events:** Create an invite-only event for customers to share their experiences. Invite prospects to that event.
- ✓ **Create an engaging program:** Curate a program where customers lead the conversation and share their success stories with prospects.
- ✓ **Reward participation:** Send personalized, exciting gifts to advocates and attendees, enhancing the event experience.
- ✓ **Incentivize referrals:** Reward successful referrals made during the event, encouraging further advocacy.



## 5. Gifting for highly-regulated industries

**Objective:** Show appreciation without violating compliance in regulated industries.

**How to run it:**

- ✔ **Understand compliance:** Review specific industry regulations on gifting, such as healthcare or finance, to ensure compliance.
- ✔ **Offer neutral gifts:** Opt for universally acceptable gifts like branded stationery, digital gift cards, or charity donations.
- ✔ **Focus on experiences:** Consider offering educational virtual experiences or webinars to align with customer goals.
- ✔ **Highlight the value:** Position your gifts as tokens of appreciation that reflect the long-term relationship.

## 6. Customer Appreciation Day [April 18th] campaign

**Objective:** Demonstrate customer value through a coordinated appreciation event.

**How to run it:**

- ✔ **Choose the right day:** Select a customer-centric day, such as National Customer Appreciation Day.
- ✔ **Announce in advance:** Build excitement with a pre-announcement through email or social media.
- ✔ **Send gifts:** Offer a range of gifts based on customer preferences (e.g., a thank-you note with a coffee bundle or a bottle of wine).
- ✔ **Tie it to your brand:** Use a personalized message to emphasize their importance to your business.
- ✔ **Create a full-day celebration:** Offer flash deals or surprises throughout the day to keep engagement high.






# Take your customer programs to the next level with corporate gifting

Corporate gifting isn't just a transaction—it's a relationship builder. By integrating gifting into your customer success strategy, you can create meaningful connections that lead to stronger engagement, renewals, and advocacy. Ready to take your gifting efforts further?

Catch up on all the expert tips by watching the latest [Gift Masters episode here](#) or [book a demo with Reachdesk](#) to see how gifting can enhance your customer success goals.

## Want to dive deeper? Check out our resources:

 **Blog:** [10 ways to use gifting and direct mail for customer engagement](#)

 **Better together:** [Advancing customer advocacy with Inluitive and Reachdesk](#)

 **Ebook:** [Your Guide Account-based experience and gifting](#)



## Gift Masters



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