



# Quick Win Guide

Best Practices for  
Holiday Campaigns



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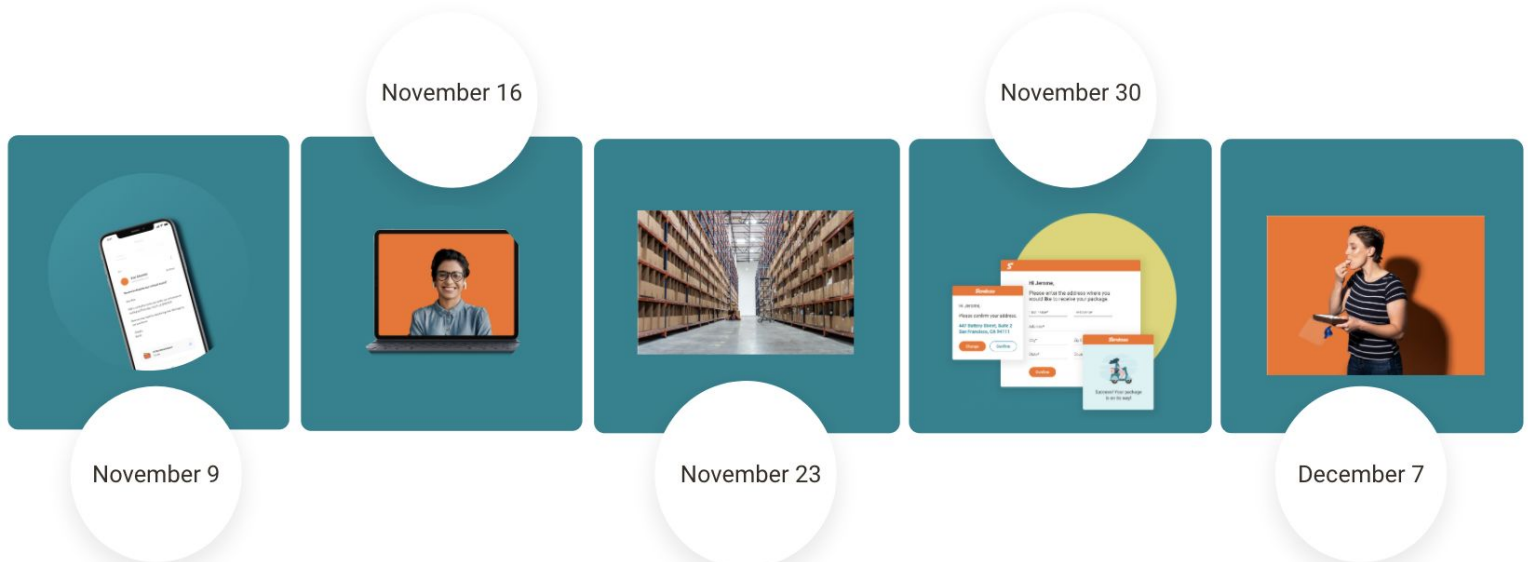
This guide details actionable steps and examples you can use to build engaging holiday sending campaigns that drive measurable ROI.

### Start Planning Your Holiday Campaigns Early

Sales, marketing, and CX holiday campaigns are about more than spreading cheer. They're critical to building long-lasting relationships, creating sales pipeline, and generating revenue in Q4 and beyond.

Getting started early is the first key to success. The holidays are a busy season for everyone, especially merchants and shipping carriers. Avoiding the last-minute rush will help you eliminate unnecessary additional shipping fees and ensure your recipient's packages are delivered on time.

The Sendoso project management team recommends that all items being shipped in December are **sourced by the end of October** and packaged and **shipped by the end of November**. Businesses typically close and people travel during the last few weeks of the year, so we also recommend ensuring your packages are delivered by early to mid-December.



**Pro tip:** Didn't make that deadline? Have no fear! We have Sendoso Direct and eGift options that have shorter processing times and are still on theme for the holidays. You could also opt for non-branded options for physical sends that have a quicker timeline of one to two weeks.

## Don't Limit Holiday Sending to December

Holiday sending works year-round but if you or your recipients are in the United States, Canada, or the UK, the most prominent holiday period is from October to January. There are many official and unofficial holidays that make for great sending campaigns from October through January:

- **October:** Gain the attention of decision makers and key customers at the beginning of the holiday season and last business quarter of the year.
- **November:** Throughout this month of gratitude, give thanks to your buyers, customers, partners, team members, and friends with thoughtful gifts and messages.
- **December:** Give the gift of joy amid this magical time of year! This is a great time to cheer your employees, celebrate sweet endings with customers and embrace new beginnings with prospects.
- **January:** The new year is a perfect time to reestablish your brand since most people won't expect to receive anything after the holiday season is over. Plus it can set your pipeline up for the year to come.

You can even celebrate unofficial holidays like Boss's Day (October 16), National Take a Hike Day (November 17), National Sock Day (December 4), and World Nerd Day (January 9).



## Know Your Audience and Stand Out

To ensure your holiday send stands out and is relevant to your audience, first ask yourself:

- Who are they?
- What are their job roles?
- What are their performance objectives?
- What messaging will encourage them to take action?

Then establish your reach and budget. If you have long customer list, you can conserve your budget by tiering your accounts, sending higher cost items to higher-value accounts, and lower cost items to a wider audience.

No matter who you're sending to, you'll want to consider the recipient's unboxing experience. Uplevel digital gifts by including a branded holiday banner and a custom message. For physical items, customize the box with your branded tape, crinkle or tissue paper, and a handwritten note. Our project managers are here to work with you to brainstorm more ways to "wow" your recipients.

## Send Examples for Each Team

Holiday campaigns create an additional reason for sales, marketing, and CX outreach that bridges the gap between online and offline touchpoints, especially in our remote-first world. Here are outreach ideas your sales teams can use that incorporate Sendoso touches with the goal of driving revenue in Q4 and beyond.

### Marketing

**Drive Awareness and Generate Demand:** 'Tis the season of giving! Help your prospects get into the holiday spirit by sending them a Sendoso Choice eGift with the option to support a local restaurant or donate the amount to their favorite charitable cause. Include a CTA in your message that drives traffic to your solution pages or a demo request landing page.

**Increase Virtual Event Attendance:** Send holiday-themed cocktail kits to help drive attendance and also to create the in-person feel for a virtual event. You can even designate internal “bartenders” to spark dialogue and participant interaction. Sendoso recently employed this strategy and saw an **85%** Address Confirmation response rate and a **90%** win rate of opps that attended a virtual event.

**Bolster ABM Programs:** The holidays are a unique opportunity to spread cheer while creatively educating your audience. After you've segmented your recipient list, here are ideas to send to prospects at varying points in the ABM funnel:

- **One-to-many:** Send decision-makers an email with the message, “Let’s meet over lunch and discuss how we can help you achieve your 2021 goals. P.S. Lunch is on us!” On the morning of the scheduled meeting, send everyone on the guest list a lunch eGift to a local restaurant or food delivery service.
- **One-to-few:** Surprise and delight recipients with a custom Halloween bundle including a branded mug, assorted candies, printed marketing collateral, and a handwritten note detailing how your product and/or services can “unmask” their Q4 goals.
- **One-to-one:** Personalized bundles work well for high-value, mid-funnel accounts. For instance, if you learn your prospect is an avid coffee drinker during initial conversations, send them a Nespresso Machine, content that highlights your value proposition, and a handwritten note that says, “Espresso-ing our gratitude this holiday season.” After the meeting is taken, follow up with a package of Nespresso Coffee Pods to keep the conversation going.



## Sales

**Book Meetings and Create New Sales Opportunities:** Send a holiday card with the message, “All I want for Christmas is a 10-minute appointment with you!” Or send socks, an informative one-pager about your solution, and a handwritten note detailing how you can help them kick-off the new year on the right foot! **Pro tip:** If you’re using [Outreach](#) or [SalesLoft](#), you can set up triggers to automate digital sends as part of your existing sequences or cadences.

**Re-Engage Decision Makers:** Identify decision-makers that have gone dark over the previous quarter and invite them to attend a virtual holiday party with [In Good Taste](#). A few days before the event, your attendees will receive eight mini bottles of wine. During the event, they will be led through a 30-minute wine tasting by In Good Taste, followed by a networking hour. **Pro tip:** Follow up with marketing collateral that corresponds with the wines you tasted with prospects!

**Accelerate Pipeline Momentum:** If you’ve identified stalled pipeline opportunities, build an integrated campaign to re-engage and win back the momentum. One Sendoso customer noticed accounts going dark and sent them custom made fortune cookies that included predictions in their industry for the upcoming year. They elevated their send with a custom made box, a printed copy of the report, handwritten note, and crinkle paper.

## CX

**Welcome, Upgrade, or Renewal:** Send your customers thoughtful handwritten notes explaining why you’re thankful for them. These sends work especially well from November all the way into January. Make your message timely and be specific when drafting your personalized note and expression of gratitude.

**Support Year-End Business Reviews:** Prior to scheduling a year-end business review with a customer, send them a winter-themed bundle with flavored tea or hot chocolate mix, mugs, fuzzy socks, hand warmers, and other items with the messaging that you’re looking forward to “heating up their strategies” while planning for the upcoming year.

**Celebrate Customers’ Success:** Many annual contracts renew during this time of year, so remind your customers how important they are to you by sending champagne or another special treat with a handwritten note celebrating your anniversary or another successful year working together. A Sendoso customer took this approach, sending a shimmering bottle of bubbly in a custom engraved wood box. They also included a handwritten note saying, “Here’s to a sparkling new year.”





## Always Follow-Up

Don't just send a gift and expect your recipient to keep the conversation going. Make sure you have a follow-up plan in place to keep your recipient engaged. With the ability to track all of your gifting campaigns with Sendoso, you can see when your gift was delivered, give your recipient an hour or so to discover your gift, and then send a quick email to see if they enjoyed your gift.

## Run an Integrated Campaign

When thinking about your holiday sending, remember it's so much more than sending a gift. To see the most results, we recommend creating integrated campaigns encompassing multiple inbound and outbound touchpoints that drive engagement, and bridge offline and online channels.

Partner with your field teams to align on your goals, objectives, and audience. Be sure to provide supporting material like email templates and follow-up content so they can be effective in their outreach efforts, ensuring all processes are streamlined and straightforward across:

- Sendoso Sends
- Email & Landing Pages
- Targeted Ads & Social
- Sales & Marketing Collateral
- Sales Messaging & Positioning



## Measure & Report

Make sure that every Sendoso send is linked to a campaign in your CRM or marketing automation in order for you to measure the success of your program. Here is a shortlist of success metrics you should track both at the send level and down the funnel.

- Response Rate ( $\# \text{ Addresses Confirmed} / \text{Total \# Sent}$ )\*100
- $\# \text{ Meetings Booked}$  and Meeting Attendance Rate
- Response to Opportunity Rate ( $\# \text{ Responses} / \text{Total Ops Source}$ )\*100
- Pipeline Sourced by Campaign and Pipeline Influenced ( $\# \text{ of Ops and ARR}$ )
- Opportunity Stage Change and Velocity (Pull Stages at Send Date to Compare Change Over Time)
- Closed Won Revenue ( $\# \text{ of Ops and Total ARR}$ )

In addition to quantitative, seek out qualitative results by collecting feedback senders and recipients of the holiday gifts. Share your comments, email responses and results regular team meetings to maintain momentum, optimize workflows, and drive cross-team alignment around these campaigns.

## Customer Story: A Successful Holiday Campaign in Action

### Strategy

A publicly traded enterprise software company with over 1,000 employees incorporates sending as an integral piece of its ABM program.

At the beginning of Q4 2019, they built a holiday bundle campaign, shipping 345 customized holiday packages (holiday card treat, sweet treat, Total Economic Impact infographic, Total Economic Impact executive summary, and a handwritten note) to target accounts.

### Integrations

They also created a Marketo trigger, that sent high-value contacts eGift cards automatically after they book a meeting with a sales representative and used Sendoso's Salesforce to empower sales to get real-time delivery notifications, personalize messaging, and send timely follow-ups.

### Results

To date, that campaign has generated \$100M in pipeline and \$30M in recognized revenue.

