



Quick Win Guide

Best Practices for Customer
Milestone Sending



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Best Practices for Customer Milestone Sending

We outline tips on how to get your customer sending, examples of effective sends and key metrics you should track to measure your success.

In order to truly connect with customers and create brand loyalty, it's important you go the extra mile to make them feel valued. And your newsletter alone isn't going to cut it anymore. You need to make sure you're talking loudly across every channel to ensure your message is heard.

One of the simplest yet most powerful ways of achieving this is by sending at strategic points across the customer lifecycle. Here are a few examples of milestones within the customer journey where you can include a send:



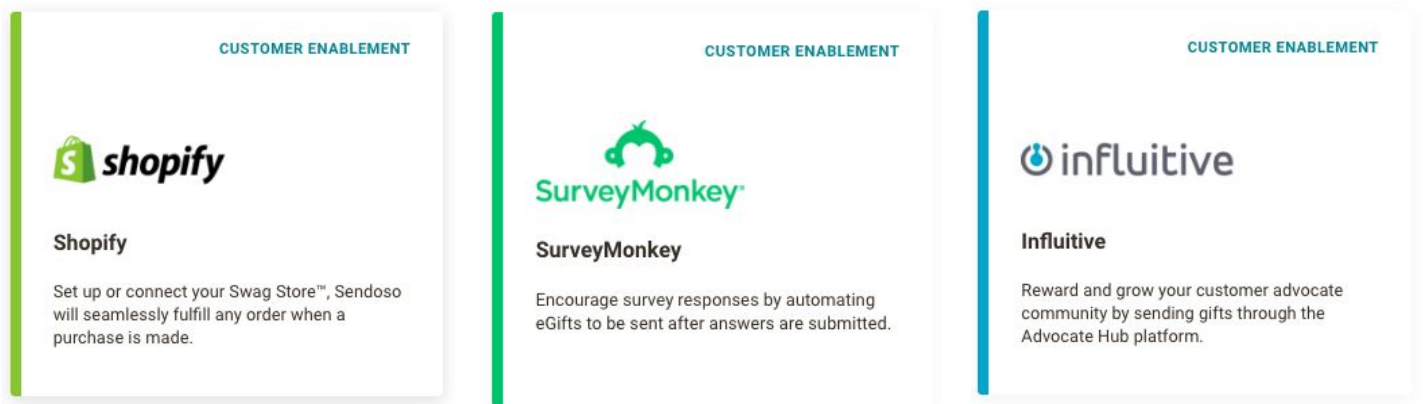
Pro Tip: Partner closely with your marketing team to align on the entire customer journey, as well as mirror any segmentation or account-based (ABX) strategy. Here are some key factors for a successful partnership:

- Weekly alignment meetings to collaborate on engaging programs
- Team up to build brand advocates
- Create a process for capturing and sharing customer stories
- Marketing supports customer success on digital plays (ie. ads and sponsored social) and relevant activities

Set Up Touches & Integrations

Before rolling out Sendoso to your team, ensure that you all have Touches set up and all relevant integrations in place. Some of the best Touches for customer teams include eGifts for coffee, lunch/dinner, or Wine.com; branded welcome kits, sweet treats, and bottles of champagne; and personal gifts from Amazon.

Include information for when reps should use the send either in the notes or title of the Touch. Integrations are critical when it comes to driving adoption because it allows your reps to send from wherever they already work. Here are integrations that customer teams may want to use ...



Leverage Data to Determine Sends

When determining the right send for a customer or group of customers, start by analyzing the value of the connection (such as the length of service or the value of their accounts and/or referrals) and arrive at a budget that will allow you to show your appreciation. Once settled on a range for your item(s) and packaging, you have a world of choices at your disposal. Some perennial favorites include:

- **A practical, branded item** that will be regularly used and keep your brand top of mind.
- **A comfort item** such as a blanket or a personalized piece of clothing.
- **An indulgence**, such as sweet and savory treats, wine, or champagne.
- **Mindful gifts** such as charity donations or wellness-focused gifts and experiences.
- **Personal gifts for life milestones**, such as an item off a registry for newlyweds, a baby blanket for the newest addition, a beautiful live plant to celebrate buying a new home, or a congratulatory bottle of bubbly to acknowledge the hard work of earning a degree.

Keep reading for some examples of strategies for your customer milestone campaigns.

HOW TO Celebrate Milestones with Customized Packages

Strategy

Celebrate new customers with welcome packages.

Pro Tip: Tier your customers based on size of company.

Tier 1: Enterprise/Mid Market

Custom laser-engraved box, tumbler mug, foldable freebies, handwritten note, branded tape, and packing paper.

Tier 2: SMB

Tumbler mug, foldable freebies, handwritten note, branded tape, and packing paper.



HOW TO Enhance Customer Support Experiences with Relevant Touches

Strategy

Think about sending for support and service teams three categories:

- **Service-Related Touches**
 - Service Misses/Recovery
 - Product Bug Identification
- **“Surprise and Delight” Opportunities**
 - Thoughtful Product Suggestions
 - Personal “Wow!” Opportunity
- **Celebrate Raving Fans**
 - Product Champions
 - Sendoso Milestones



HOW TO

Drive Customer Retention using Sendoso

Strategy

Just as important as celebrating with your customers is standing with them during difficult times. If your customer's company is experiencing a roadblock, loss, or unexpected change, send a token of appreciation to let them know you stand with them and you're dedicated to their success.

Be strategic. Focus on your best customers and monitor when they're due to renew. You can also tier them out based on lifetime value and user role.



HOW TO

Augment NPS using Sendoso

Strategy

Use sending to drive responses, reward product feedback, and get ahead of issues.

Pipeline of Advocates

- Send \$30 eGift card with a note thanking them for being a valued customer and asking for a review.

Product Feedback

- When a valued customer offers great product feedback, send branded swag to keep you top of mind.

Get Ahead of Issues

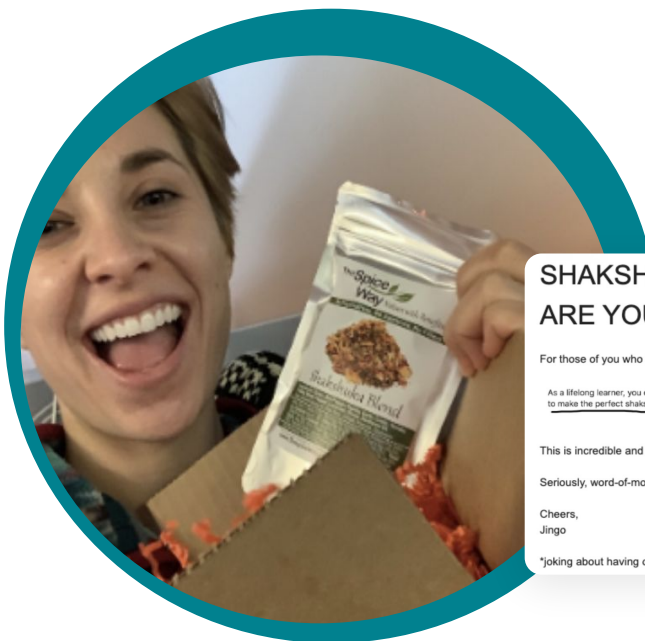
- When an issue arises, have your CSM connect with the customer to proactively resolve their issue and then send a Sendoso Direct sweet treat afterward.



Best Practices for 1:1 Sends

Here are a few best practices for a 1:1 send (example below) to review with your teams:

- **Relevance:** Is the item you're sending relevant to your value prop and/or the prospect? Does it make them feel special or spammed?
- **Specificity:** Is the item specific to something your prospect cares about? (i.e. plants/nature, sweets, wine tasting, books, sales content). Find this info on LinkedIn, Google, or other social media sites.
- **Timeliness:** Is your send landing in their hands in time? Especially when using Address Confirmation, kindly follow up with prospects to ensure they confirm or change their address in a timely manner.



SHAKSHUKA SPICE BLEND. ARE YOU SERIOUS?!?

For those of you who have not had the pleasure of stalking [my LinkedIn profile](#), I proudly note my love for Shakshuka in my About section (please see below).

As a lifelong learner, you can usually find me flipping feverishly through existentialism books (paperback), [learning](#) to make the perfect shakshuka, discussing social psychology, or helping my fellow LGBTQ+ community.

This is incredible and thank you soooo much! What a thoughtful and delightful surprise. If I wasn't already a Sendoso believer and lover, then I sure am now!

Seriously, word-of-mouth marketing is so powerful and important. I would know because I've already sent these pictures to all my friends (a total of 3)*

Cheers,
Jingo

joking about having only 3 friends. not joking about sending them the pictures

Measure & Report

Make sure that every Sendoso send is linked to a campaign in your CRM in order for you to measure the success of your program. Having the data to understand how your customers are engaging with your efforts is key to retention marketing success. You can measure:

- Decreased Time to Value
- Increase in upsell opps (post QBR)
- Increase in renewal rates
- Increase in # contacts engaged per account

Create regular feedback loops with customer reps highlighting both the aggregate successes and anecdotal success within individual deals. Share them in weekly or monthly team meetings in order to maintain momentum and demonstrate the success of your program.

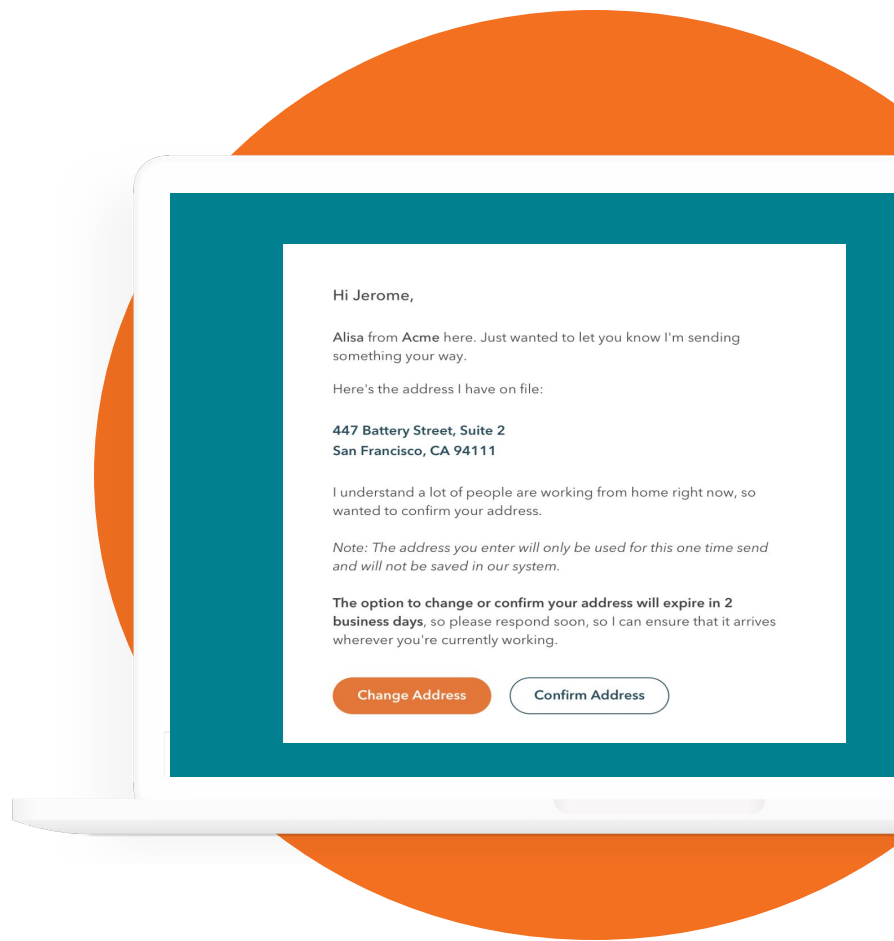


Address Confirmation

Utilize Sendoso's Address Confirmation feature to ensure your sends are shipped to a recipient's best address.

Simply select the Address Confirmation checkbox before hitting "send." The recipient will receive an automated email from you asking them to either change or confirm their address within two business days.

If the recipient needs to make a change, they'll do so on a linked landing page. Once the address is confirmed, the send is fulfilled by Sendoso and the sender receives a delivery confirmation.



Success Snapshot: Arctic Wolf

Arctic Wolf, the leader in security operations, uses Sendoso to target CSIOs, CTOs, security analysts—an audience that tends to be more serious.

The marketing team coordinated email outreach with fresh messaging. Then CSMs followed up with a call and social media outreach to set meeting using Sendoso Choice eGifts. Here are some results from the first weeks:

- **41 Opps**
- **27 Closed/Won Deals**
- **High 6 figures \$ Influenced ARR**

Happy sending! Visit sendoso.com to learn more.

