



# Quick Win Guide

Creative Sends with our  
Project Management Team



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## Creative Sends with our Project Management

In this guide you'll learn more about Sendoso's project management team and how they can make your sends easier.

### Start Planning Your Holiday Campaigns Early

At Sendoso, we love bringing your creative send ideas to life! The secret sauce behind some of the amazing custom bundles we've made is our rockstar project management team, who can help by brainstorming, sourcing, ordering, and storing custom items for your campaigns.

The team's expertise stems from sending thousands of gifts every day, utilizing our large vendor network. Sendoso is vendor-agnostic because our main priority is getting our customers the right item within your budget. All you have to do is pick from our extensive catalogue of items, share your branding and design vision, and we take care of the rest.

Each project manager is assigned to a specific account, so we get to know you and your brand and build a trusting relationship. If you haven't met your project manager, ask your CSM to set up an introduction today!

### How the Project Management Team Works

1. We do a discovery call with you and your team to learn about what you want to accomplish, your audience, quantity desired, and completion timelines. With that information, we brainstorm ideas and build you a pitch deck with different custom items within your set budget. Bonus: we even have a bank of awesome puns!
2. You determine what you want to send and we take care of the rest. For any branded items, we will gather a vector formatted logo.
3. We build a statement of work with cost and time estimations for your review. If approved, we'll deduct the cost from your desired funding source automatically and begin sourcing.
4. We purchase the items, and track shipping and delivery. All you have to do is wait for the items to be inventoried at the warehouse. Once delivered, you'll be notified and can build your bundle within the Sendoso platform and hit send!

We conservatively estimate [three-to-four weeks](#) for this process. In a pinch? We can organize rush deliveries or recommend items with quicker processing and shipping times.



## Factors to Consider When Determining Your Send

**Stand Out:** You might have attended a tradeshow a couple years ago and saw 50 different brands handing out fidget spinners. And while they were popular at the time, the point of sending is to create a memorable impression that's unique to your brand.

**Quality over Quantity:** Everything you send is an extension of your organization, and, in many cases, a first impression. If you send cheap items, it could reflect poorly on your brand image. However, it's possible to send quality items without breaking the bank. Our project management team has a shortlist of reliable vendors who we can trust their price and their quality.

**Messaging Alignment:** If you spend money on the campaign you want to make sure you get your message across. We highly recommend you pair any sourced item with collateral about who your company is and how you're there to help.

**Make it Useful & Relevant:** You want to send something your prospect or customer can enjoy or will use regularly regardless of their affinity to your brand. For an item to be useful, it doesn't have to break your budget. Notebooks, pens, coffee mugs, blankets, laptop covers, popsockets are popular and affordable.

Send items that are relevant to the moment, like sending something before an event; or items that are meaningful to your audience. To ensure your send stands out and is relevant to your audience, ask yourself:

- Who are they?
- How many people are you trying to reach?
- What are their job roles?
- What are their performance objectives?
- What messaging will encourage them to take action?

## Examples of Bundles We've Sourced

Our team has sourced thousands of items for our customers. Here are just a few examples of what we've sourced for our customers based on what they were looking to achieve:

### Book Meetings

Chili Piper wanted to open doors with prospects. The team sourced on-brand crinkle paper, branded hot sauce, and a note card that read "Spice up the office!" Following the send, the Chili Piper team saw a **33% increase** in meeting show rates.





## Create New Sales Opportunities

A publicly traded software company with 1,000+ employees worked with our team to build **345** customized holiday packages with the goal of creating new sales opportunities. The bundle included a holiday card, sweet treat, Total Economic Impact infographic, Total Economic Impact executive summary, and a handwritten note. As a result, they saw **\$100M** in pipeline and **\$30M** in closed-won revenue.

## Re-Engage Stalled Opportunities

Our project management team sourced custom, branded fortune cookies, each filled with a ROI stat a customer had seen by using Sendoso. It came in a branded box and also included a custom note from the account executive on the account. As a result we saw a **62%** Address Confirmation response rate, **\$3.3M** pipeline influenced, and **26%** of deals progressed stage week after send.



## Drive ABM Pipeline & Revenue

The team worked with Terminus to create **100 ABM bundles** including an ABM “recipe” cookbook, handwritten note, and branded kitchen tools: rolling pins, spatulas, measuring cups, potholders, and whisks. Inside the recipe book were ABM strategies using food and cooking metaphors. They influenced **\$3.1M** in pipeline and **\$322K** in revenue in just two quarters.



### Improve Event Follow Up

Rollworks wanted to improve the SDR team's post-event follow-up by sending custom packages to key personas. Our team worked with them to build a bundle including branded coffee, stickers, and a value proposition one-pager. As a result, they saw a **55% increase** in response rates and a **22% increase** in net new opportunities.

### Retain Important Customers

While in-person travel and events are cancelled, it's becoming more important to create unique remote experiences, like sending cocktail bundles prior to virtual happy hours. Before a Sendoso customer event, the marketing and project management teams worked together to build margarita kits with the goal of driving attendance and creating an engaging experience. During the event everyone mixed their drinks, networked, and participated in a round table talk. As a result, we saw an **85% Address Confirmation response rate** and **90% win rate of opportunities** that attended the virtual event.



### Packaging & Inventorying

**Custom packaging:** Have you thought about different types of packaging options? Our project management teams are experts in creating unique unboxing experiences. We can help you source custom boxes, colored bubble mailers, packaging tape, crinkle paper, stationary, and more!

**Sourcing:** When you're creating a new product, you can decide whether or not you'd like Sendoso to take care ordering that item for you in the future. All you need to do is check the "Have Sendoso Source This For You" option and enter in your ordering instructions.

**Inventorying:** When sending inventory to the Sendoso warehouses, please be sure to follow our [packaging requirements](#) and include the ship notice on each box. Not including a ship notice may cause delays in adding your inventory to the warehouse. Each box you ship must only contain one SKU. If you are sending multiple items (like 50 pens and 50 water bottles, for example), unique items must be in their own box with their own SKU (i.e., the pens should be placed in a box with one ship notice and the water bottles should be placed in a separate box with another ship notice).

For more information about shipping and inventorying in Sendoso's warehouse, [check out this article](#).