12 Months of Gifting

How to Optimize Gifting Experiences to Drive Sales Engagement Throughout the Year



Welcome

to *12 Months of Gifting: How to Optimize Gifting Experiences to Drive Sales Engagement Throughout the Year*

This eBook is designed to empower companies of all sizes to strategically approach gifting as a continuous customer engagement tool. From leveraging data-driven insights to curating memorable gifting experiences, you'll learn how your organization can seamlessly integrate gifting into its broader marketing, sales, and retention strategies.

Additionally, you'll learn how emerging technologies like artificial intelligence (AI) drive meaningful personalization and enhance customer experience. You'll also uncover effective distribution strategies through gifting platforms and partnerships within the corporate gifting space, ensuring your brand reaches a wider audience and maximizes impact. Leveraging artificial intelligence and data analytics, organizations create hyper-personalized gifting solutions that resonate deeply with recipients while streamlining operations.



Drawing from To&From's extensive experience in curated gifting and our commitment to personalization and sustainability, you'll discover best practices, innovative trends, and scalable solutions that enhance both the giver and receiver experiences. You'll transform your gifting strategy into a year-round, revenue-driving engine that strengthens relationships and leaves a lasting impact.

Ready?

Okay then, let's embark on this journey to elevate your organization's gifting strategy, making every moment an opportunity to connect, celebrate, and grow.

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01

What is purposeful gifting?

Purposeful gifting is the act of giving a gift with intention and meaning, to convey a specific sentiment or fulfill a particular need. Proactive, mindful, and authentic, purposeful gifting fosters a connective bond between giver and receiver.

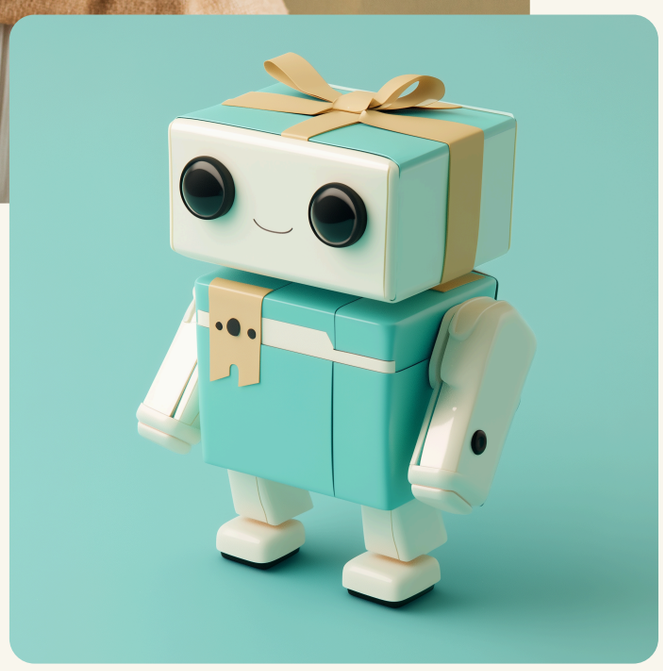
Purposeful gifting is *not* the sending of yet another unwanted, just-waiting-to-be-recycled water bottle splashed with your logo to a prospective customer. At least not usually.

Unlike traditional, transactional gifts, purposeful gifting is strategic, focused on the recipient's preferences, needs, and the broader goals of the business relationship. Purposeful gifting is—at a minimum—**thoughtful,** chosen with the recipient's needs, tastes, and values in mind, and **meaningful,** designed to make the recipient feel special and understood.

Done well, purposeful gifting builds connection, making recipients feel seen, understood, and valued. Purposeful gifting creates lasting memories and experiences that are remembered.

So, you might be asking yourself, how does purposefully gifting help my revenue team reach its goals and objectives?





02

How gifting drives top-line sales

In B2B sales, building strong relationships is key to driving revenue. Purposeful gifting has emerged as a powerful strategy to enhance customer engagement, foster brand loyalty, and ultimately boost top-line sales.



Creating Meaningful Connections

Gifting establishes genuine human-to-human connections by demonstrating appreciation beyond business transactions. Thoughtful, well-timed gifts break the ice in impersonal industries, building trust and strengthening professional relationships. Recognizing milestones or aligning gifts with clients increases receptivity, leading to more opportunities for collaboration and sales growth.

02 How gifting drives top-line sales



Strengthening Business Relationships

B2B success relies on long-term relationships rather than one-time deals. A strategic gifting approach provides value beyond products, which then reinforces a company's investment in its clients. Stronger relationships translate into repeat business, referrals, and expanded opportunities, all of which drive revenue.



Enhancing Brand Loyalty

In competitive B2B environments, differentiation is critical. Personalized gifting leaves a lasting impression, and positions a brand as one that values its customers. When clients feel appreciated, they are more likely to remain loyal and choose the same vendor for future needs. This emotional connection also fosters advocacy, leading to organic growth through positive word-of-mouth and referrals, further increasing sales.



By leveraging purposeful gifting, businesses deepen connections, nurture valuable relationships, and strengthen brand loyalty, all of which contribute directly to top-line revenue growth.

03

Integrating gifting into existing growth strategies

There’s a tendency to think about gifting only during the holiday season. However, integrating gifting into your existing growth strategies is a year-around endeavor.



In fact, gifting for your B2B business entails much more than just the calendar. Sure, the calendar is important, for there are a number of purposeful gift-giving opportunities tied to special dates and occasions. However, perhaps the most important consideration when integrating purposeful gift giving into your growth processes and plays is where your recipient currently lies in their buying journey—**Awareness, Consideration, Decision, Purchase, or Retention.**

03 Integrating gifting into existing growth strategies

STAGE 1

Awareness

At the Awareness stage, your focus is on capturing and engaging the attention of your prospective customer, introducing your brand with purpose and intention. Unfortunately, all your competitors have the same focus.

Gifting, however, offers a creative, memorable, and sustainable manner to stand out in a crowded marketplace and make a lasting impression. A well-thought-out gift at the Awareness stage communicates the values of both you and your company, as well as how they align with those of your lead. By aligning a gift with company and individual values, you connect and lay the foundation for a long-term partnership.



Example:

This is the best time to send branded or promotional materials. You are trying to capture attention, and you need a hook. This is early-in-the-funnel, getting-to-know-you kind of engagement, and kitschy—even campy—can be cool. But that doesn't mean it should be a throw away. Even with something as simple as a pen, test the product beforehand and ensure it writes like a dream!

STAGE 2

Consideration

In the Consideration phase, prospective customers actively research and evaluate different solutions to their problem, challenge, or opportunity. During this phase, your revenue team proactively seeks ways to engage and foster two-way communication.

Gifting in the Consideration phase should break down any engagement barriers that might be present, spark further conversation, and showcase your commitment to the relationship. Differentiate your company with a thoughtful, meaningful gift, and drive deeper engagement.



Example:

While enriching the customer's gifting profile, you learn that they are obsessed with making craft cocktails. You send them a personalized ice cube maker along with a hand-inscribed card.

STAGE 3

Decision

In the Decision phase, your prospective customer compares and evaluates different vendor options, carefully weighing elements like price, quality, features, customer service, and company reputation to select the best supplier. It’s down to you and one or more competitors, and now is not the time to lose engagement and dialogue!

Gifting in the Decision phase should reinforce a keen attention to detail (what has a competitor missed?) and further build trust. Show you’re committed to their professional success, and solidify their confidence in you and your company.



Example:

Gift giving at the Decision stage often requires a delicate touch, and the best gifts are delivered in person to the customer. Recognize all the hard work by dropping off a box of gourmet snacks or some luxurious teas for the buying group to share once a test deployment of a solution has been executed.

STAGE 4

Purchase

Congratulations! Your lead has chosen your company, and your prospective customer is now an existing customer. Now the “real work” starts!

Onboarding is mission-critical in shaping a customer organization’s perception of your brand. Gifting during the Purchase stage should reflect appreciation for the customer’s decision, reinforce that decision as the best course of action, and set the tone for an ongoing, mutually-beneficial partnership.



Example:

Kickstart the celebration of your new partnership by gifting something shareable with your customer’s work team, buying group, and greater organization—customized cookies or other sweet treats never fail to deliver smiles!

STAGE 5

Retention

In a competitive marketplace, keeping a customer is always less expensive than acquiring one. Always.

Purposeful gifting is a powerful way to both show appreciation and build brand loyalty. Celebrate your client's key achievements, both personally and professionally ***and*** individually and organizationally, as significant milestones in your customer relationship. Thoughtful, meaningful gifts keep you top of mind and solidify your long-term partnership.



Example:

Like the Consideration phase, the Retention phase is a perfect place to insert personalized gifting. Let your customers, partners, and teams know you see them for who they are, not just for what they do for you, your role, or your company. As you continue to get to know your customer, catalogue what you learn to guide that perfect gift purchase. Going to their lakehouse for July 4th? Their child got a spot on a top travel soccer team? Celebrating their 25th wedding anniversary in Italy? These are all clues to tailor the perfect gift, showing your appreciation for the work you do together.

04

12 months of gifting—a calendar

A gifting calendar featuring holidays and other dates of celebration can be a helpful, foundational starting point for businesses.

This calendar highlights significant days each month you can use to show appreciation for clients, employees, and partners. The idea of this calendar is to aid your business in preparation of holiday assortments, securing affiliate programs, and overall keeping on top of gifting opportunities.





04



January

- **Lunar New Year**
  (Date varies)
- **MLK Day**
  (Jan 19)

February

- **Valentine's Day**
  (February 14th)
- **Random Acts of Kindness Day**
  (February 17th)

March

- **National Employee Appreciation Day**
  (First Friday)
- **International Women's Day**
  (March 8th)
- **St. Patrick's Day**
  (March 17th)

April

- **Easter**
  (Varies, typically April)
- **Earth Day**
  (April 22nd)

May

- **Mother's Day**
  (Second Sunday in May)
- **Teacher Appreciation Week**
  (First full week of May)

June

- **Father's Day**
  (Third Sunday in June)
- **National Best Friends Day**
  (June 8th)

July

- **Independence Day**
  (July 4th)
- **National Ice Cream Day**
  (Third Sunday in July)

August

- **National Friendship Day**
  (First Sunday in August)
- **Back-to-School Season**
  (Late August)

September

- **Labor Day**
  (First Monday in September)
- **Grandparents Day**
  (First Sunday after Labor Day)

October

- **National Boss's Day**
  (October 16th)
- **Halloween**
  (October 31st)



November

- **Thanksgiving**
  (Fourth Thursday in November)
- **Black Friday**
  (Day after Thanksgiving)

December

- **Christmas**
  (December 25th)
- **Hanukkah**
  (varies, typically December)
- **Kwanzaa**
  (December 26th–January 1st)
- **New Year's Eve**
  (December 31st)

05

Innovative trends in gifting

Innovative trends have shaped purposeful gifting over the years. While the popularity of a particular gift item ebbs and flows over time (something is always the current Tickle Me Elmo), the strong general trend in purposeful gifting has settled on the foundational qualities of personalized, experiential, sustainable, and values-based.



TREND 1

Personalized gifts make recipients feel special and create a memorable experience, and often include gifts that have been customized to reflect the recipient's preferences, interests, or a shared memory. Personalized gifts create a lasting connection by demonstrating in a meaningful way to the recipient that you care about them. In the corporate gifting space, functional home office decor items have become popular gifts.

05 Innovative trends in gifting



TREND 2

Experiential gifts are usually time-based, consumable, unique, and memorable, and they elevate the recipient's experience. Examples of popular experiential gifts include tickets to events, wellness retreats, and virtual cooking classes.



TREND 3

Sustainable gifts are environmentally friendly and socially responsible, and are becoming more popular each and every month. Eco-friendly gifts and packaging are now much more common. Relatively recently, there has been an increase in wellness and self-care gifts, particularly those that can be used within the context of remote work.



TREND 4

Values-based gifts are chosen based on the recipient's values and needs—either personal or organizational—rather than just for the sake of an occasion. Choosing a gift from a brand whose values resonate with the giftee, such as a female founded business or a small maker, can make the giftee feel special, increasing the likelihood of engagement.

06

Gifting best practices

At its optimal effectiveness, purposeful gifting leaves the recipient with two prevailing impressions: those of thoughtfulness and meaningfulness. Below are a list of considerations that represent gifting best practices to reach those desired outcomes.

Tip: The more boxes checked, the better!

☐ KNOW YOUR RECEIPIENT

- Think about the recipient's personality, hobbies, and lifestyle.
- Choose gifts that reflect their interests or special memories.
- Consider gifts that align with their needs.

☐ MAKE IT MEMORABLE AND UNIQUE

- Look for handmade or locally-made products.
- Support small businesses, as well as minority and women entrepreneurs.
- Choose gifts that are personal and heartfelt.

☐ GIFT SUSTAINABLY

- Choose gifts that are less environmentally harmful, such as the unique, handmade or locally-made products mentioned above.
- Consider donating food, money, and/or time to organizations that help people in need.

06 Gifting best practices

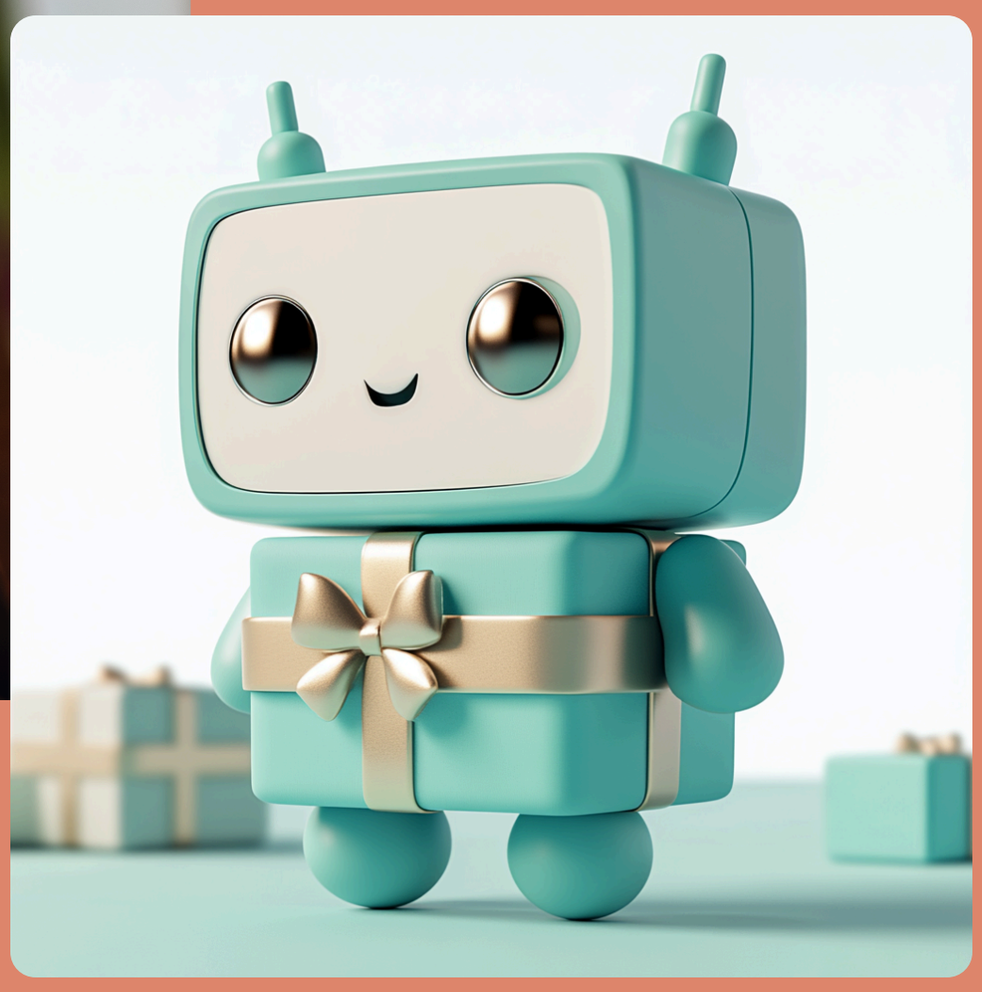
ALIGN GIFTS WITH YOUR BRAND VALUES

- Choose gifts that reflect your brand’s mission and values.
- Maintain consistency in brand aesthetics and quality.

CONSIDER THE EXPERIENCE

- Opt for gifts that create lasting memories rather than just material possessions.
- Consider shared experiences, interactive gifts, or events that strengthen relationships.

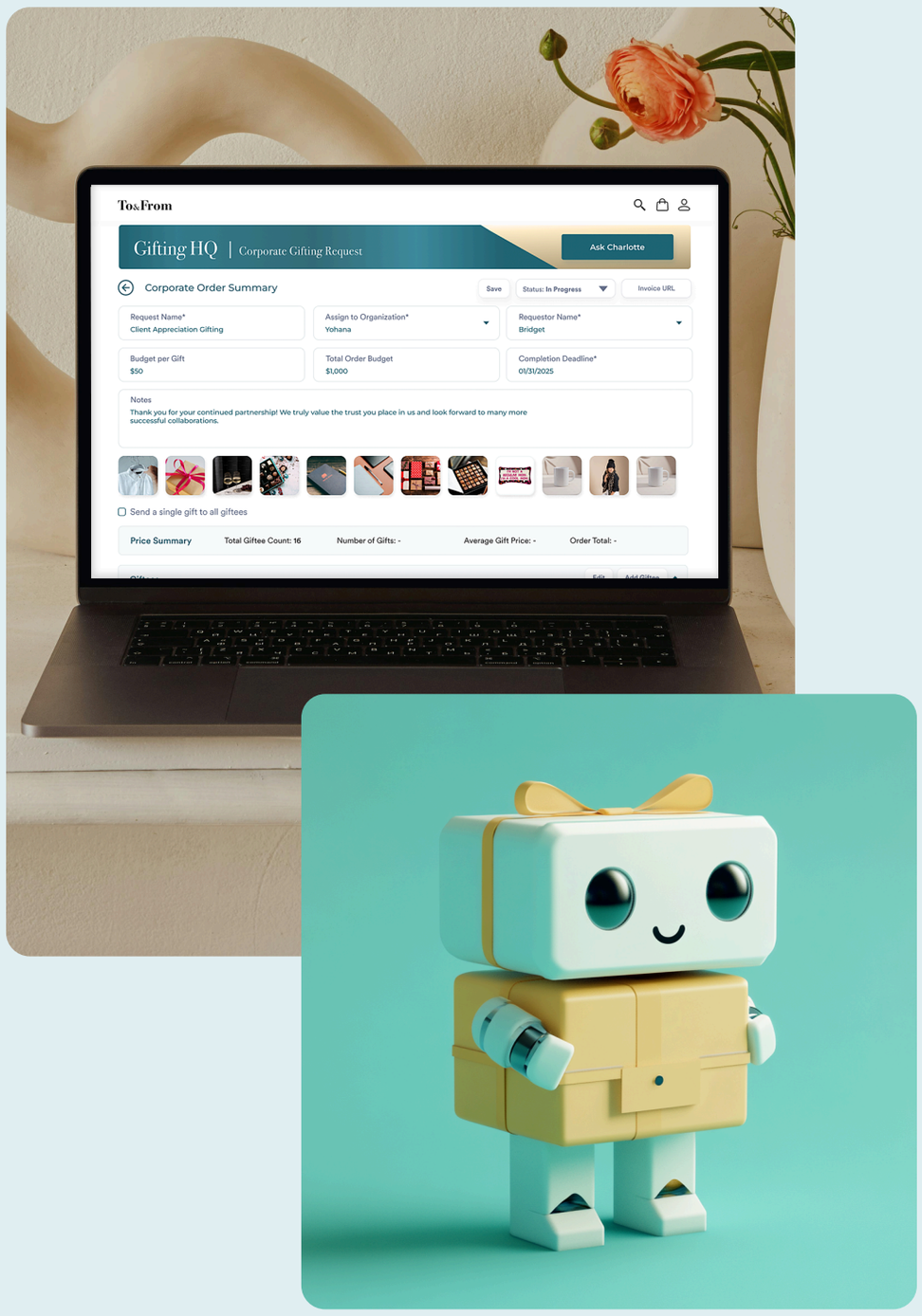




07

Scalable solutions in gifting

When it’s at its very best, purposeful gifting is, well, deeply personal. To&From’s patent pending technology brings together the best data from gifters, giftees, and brands to deliver for any occasion. The To&From solution uses this data to deliver the best reminders, recommendations, and AI-powered experience, at scale.



To&From leverages product attribution and curated gift recommendations based on information provided by or gathered about customers and prospects. By answering a few simple questions about the recipient and/or the desired outcome of the gift, To&From’s AI categorizes products to create a tailored and intuitive gifting experience.

With To&From, gifting becomes both personalized and effortless every time.

07 Scalable solutions in gifting

Plan ahead

Last-minute gifting often leads to missed opportunities and rushed decisions. To&From's AI addresses this pain point by empowering businesses to think ahead, transforming gifting into a proactive and strategic part of their operations.

To&From's gifting platform analyzes product attributes and customer preferences to identify key gifting opportunities. It streamlines the process with features like automated reminders for recurring occasions, curated gift recommendations tailored to specific audiences, and insights into customer behavior. This allows your business to position its products as thoughtful and timely gift options.

By alleviating the stress of last-minute decisions, businesses ensure gifts are not only discovered but chosen with care. The result is a seamless gifting experience that builds loyalty, strengthens client relationships, and elevates the perception of their brand.



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Notes: Has an interest in AI and technology. She cares about her co-workers and is committed to leadership. She also has a passion for environmental causes, empowering women in the workplace, and travel.

Full Customer Profile

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07 Scalable solutions in gifting

The last mile

(honing in on the customer experience)

In the context of gifting, the "last mile" refers to the final steps involved in delivering a thoughtful, meaningful gift to the recipient. It's the stage where all the preparation and planning come together to create a meaningful experience, and it is crucial to the success of the gifting process.





The last mile in gifting encompasses:

Personalization
Ensuring the gift feels tailored to the recipient, from the item itself to the packaging and presentation.

Timely delivery
Coordinating the delivery so the gift arrives on or before an important date, such as a birthday, anniversary, or holiday.

Seamless presentation
Including elements like handwritten notes, elegant wrapping, and custom branding to enhance the impact.

Recipient experience
Creating a moment of surprise and delight when the gift is received, whether through thoughtful curation or unique touches.

07 Scalable solutions in gifting: the last mile

Innovations like AI-driven personalization, curated gift platforms, and integrated delivery services allow businesses to address these challenges. By optimizing the gifting last mile, companies create memorable experiences that strengthen relationships and leave a lasting positive impression.



Challenges in the last mile of gifting include:

Logistics
Ensuring the right gift reaches the right person at the right time.

Scalability
Personalizing gifts for many recipients without losing the personal touch.

Accuracy
Preventing errors in messaging, delivery addresses, or timing.



08

Summary

Incorporating purposeful gifting into your marketing, sales, and customer retention strategies allows you to build stronger relationships with current clients, acquire new customers, and enhance brand visibility across various channels. Leveraging data-driven insights and emerging technologies like AI creates personalized, memorable gifting experiences that foster customer loyalty and boost sales. And most importantly, a thoughtfully-curated gifting process complements growth strategies year-round, not just during the traditional holiday season.

Practical, easy-to-implement strategies seamlessly integrate purposeful gifting into your customer's buying journeys, and key gifting trends, such as personalized, experiential, sustainable, and values-based gifting, resonate deeply with gift recipients. Best practices for creating meaningful connections through well-curated gifts and scalable solutions allow companies of all sizes to deliver personalized gifting experiences efficiently.

From automated reminders to AI-driven gift recommendations, To&From's platform ensures businesses meet gifting needs at scale, making the last mile of delivery a seamless, impactful experience.

Ultimately, a comprehensive, purposeful gift-giving strategy empowers your brand to transform go-to-market activations into a strategic, revenue-generating process that strengthens client relationships and drives long-term success.

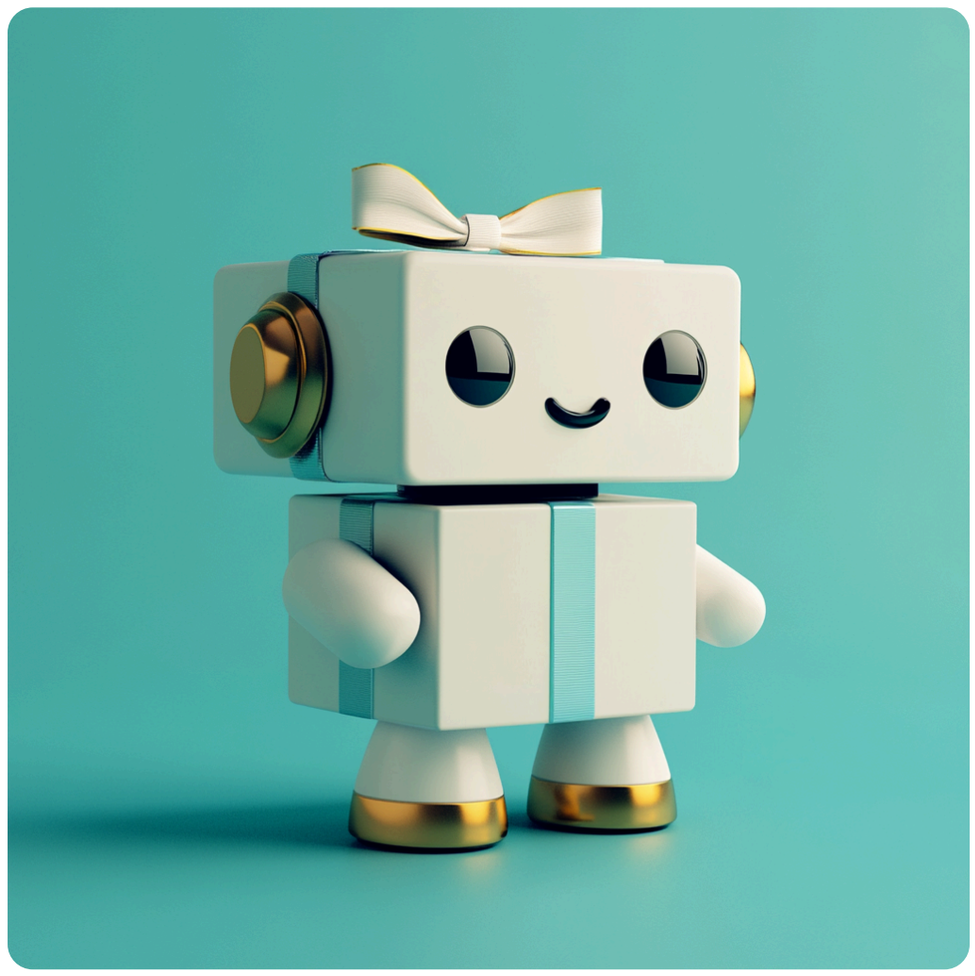


09

Additional resources

- About Our Founder
- To&From Gifting Blog
- Try To&From's AI Gifting Concierge

About To&From



To&From is a retail technology company building software to power gifting throughout the digital commerce ecosystem. Our AI expertise, unique methodology, and decades-rich retail experience ensure gifting success. For more information, please visit **toandfrom.com** or contact us at **hello@toandfrom.com**.



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