



PX Moments PLAYBOOK

Step-by-step guide on when and how to use
Alyce's **Personal Experience (PX) Platform** to
create personal bonds with buyers that drive
acquisition, retention and expansion.





What is PX?

- ★ Personal Experience (PX) is the approach that prioritizes creating and strengthening personal bonds throughout the customer journey by transforming one-to-many touches into one-to-one moments driving sustainable business growth.

What is a PX Moment?

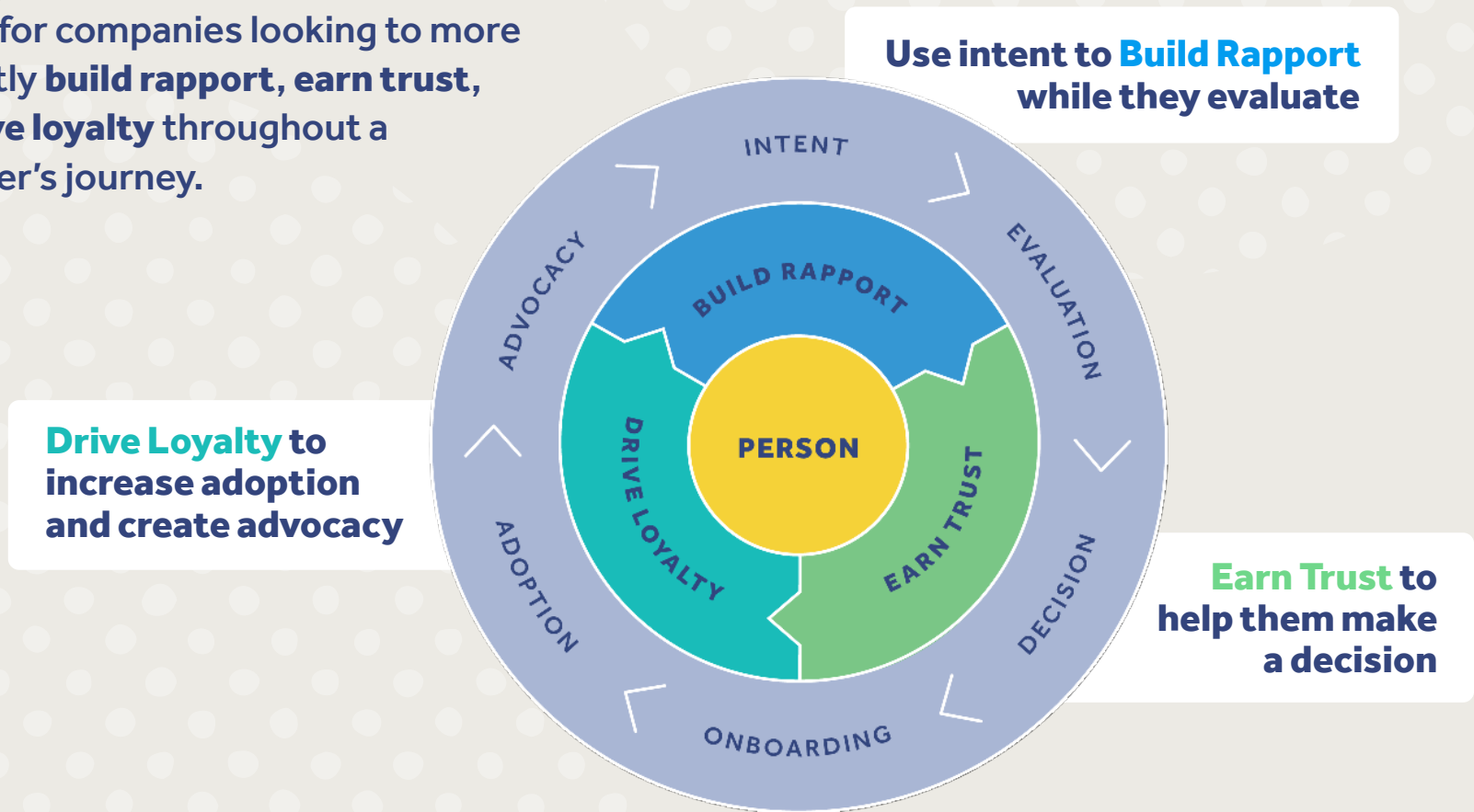
- ★ A moment is an interaction between two people when an emotional resonance is created by being **Relevant, Relatable, and Respectful.**





The Personal Experience Flywheel

- ★ The Personal Experience Flywheel is a strategy to create sustainable business growth for companies looking to more efficiently **build rapport**, **earn trust**, and **drive loyalty** throughout a customer's journey.





9-to-5: SALES MANAGER

#5to9: MOUNTAIN MAN

How to use this guide

- ★ This guide will go over nine plays you can run with Alyce during different stages in your customer lifecycle to create a Personal Experience moment that progresses and strengthens your customer relationships.



What's Included

- ★ The ten plays in this playbook are focused on these key stages of your customer's lifecycle:

- 1 Sales Prospecting**
- 2 Demand Acceleration**
- 3 Event and Webinar Registration**
- 4 Event and Webinar Follow-Up**
- 5 Post Meeting Follow-Up**
- 6 Pipeline Acceleration**
- 7 Lost Opp Reengagement**
- 8 Customer Happiness and Appreciation**
- 9 Account Expansion**
- 10 International Gifting**

1 Sales Prospecting

SITUATION

Getting responses from key stakeholders at top tier accounts is increasingly difficult.

GOAL

Break through the noise and connect with key buyers at target accounts.

START

Create a list of target accounts

Identify key prospects within the accounts and upload to Alyce

BDR or Sales Rep adds Alyce to existing outreach

Rep records a personal video to include on branded landing page

Rep selects and sends perfectly matched Alyce gift with a personal note

Prospect accepts gift

Prospect does NOT accept

END

BDR or Sales Rep confirms meeting

Meeting booked!

BDR or Sales Rep starts follow-up cadence

END

1 Sales Prospecting INSIDE THE PLAY

✦ **8-10%** conversion rates (sent to meeting booked)

✦ Increased awareness of your brand and solution with target accounts

BENCHMARKS

PLAY STEPS

Identify target accounts

Sales and marketing align to identify ICP accounts.

Identify key prospects and upload to Alyce

Use tools such as (DiscoverOrg, Clearbit, etc.) to identify 3-5 ideal prospects at key accounts. Upload names and emails to Alyce for re-search.

Add prospect to sales cadence including Alyce

Alyce should NOT be the first touch with a cold prospect. Create awareness with traditional outreach before sending them an Alyce gift.

Rep sends Alyce gift

For cold prospects, gifts from \$25-\$50 are optimal. Leverage the insights the Alyce platform can give you to help add more of a personal experience to your outreach. Alyce does the hard work of researching your prospects so you can create relatable moments with them that leverage their #5to9 interest. Also include a clear ask in your message.

DOES NOT ACCEPT

Rep follow-up

If a gift is not accepted right away—don't panic! Customers who have the most success follow-up on gifts 3-5 times before securing a meeting.

ACCEPTS GIFT

Meeting is booked

You can require recipients to book a meeting in order to receive the gift. If so, they'll book time on your integrated calendar.

Confirming meeting!

Depending on your calendar settings, your prospect may book a meeting a week or more in the future. To help make sure your recipient attends, send a reminder, ask them a question, or continue your conversation to make sure they stay engaged.

PRO TIP

If your sales team already uses video, record a custom video to use in your gifting campaigns to create a more one-to-one PX moment.

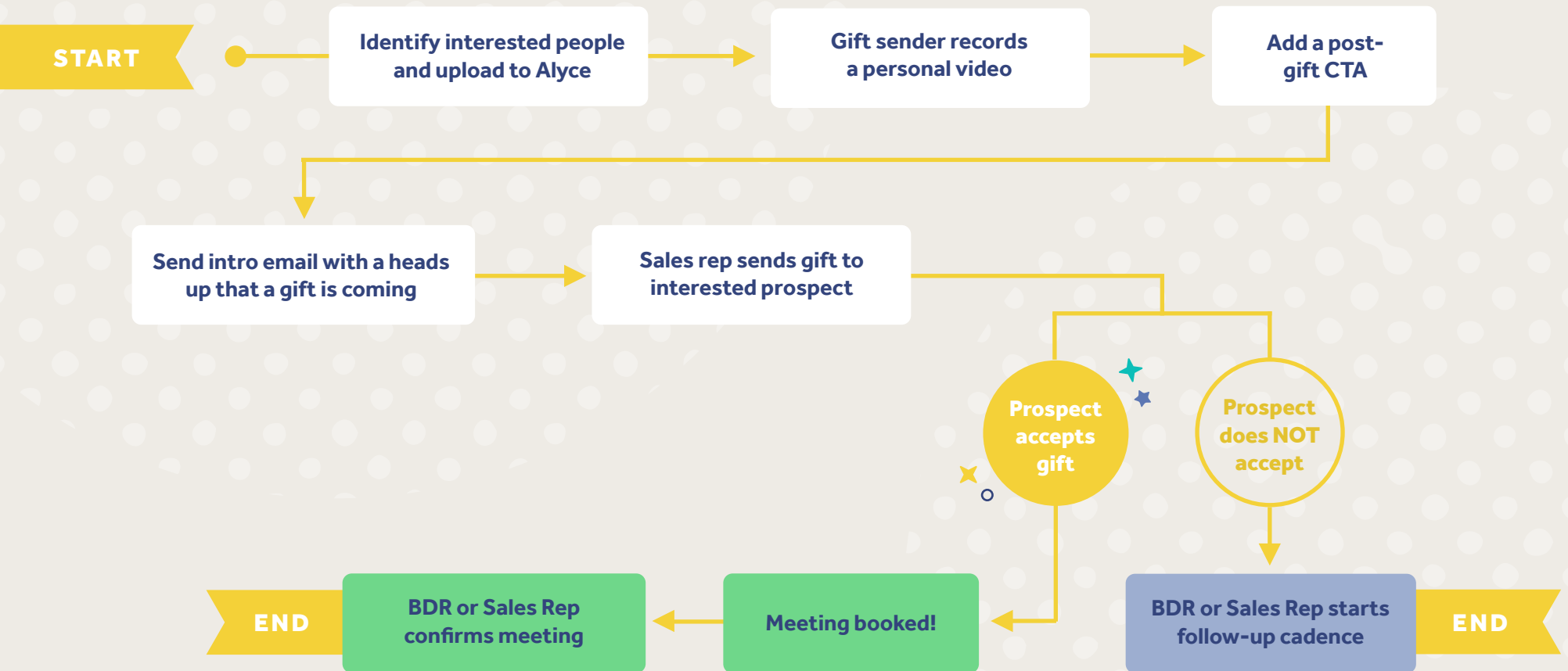
2 Demand Acceleration

SITUATION

People or accounts have engaged with your marketing team or showed interest tracked via an intent or predictive tool.

GOAL

Get the attention of these "hand-raisers" and secure meetings with them as quickly and effectively as possible.



2 Demand Acceleration INSIDE THE PLAY

✦ **13-16%** conversion rates (sent to meeting booked)

✦ **Higher quality meetings with better fit prospects who are ready to buy**

BENCHMARKS

PLAY STEPS

Select list of ideal attendees, upload to Alyce

Identify interest by looking at website visitors, blog subscribers, content downloaders, email engagements or with intent or predictive tools (6Sense, Bombora, TechTarget, etc.)

Gift sender records a personal video

Record a personal video to add to the gift landing page to thank the prospect for their interest and get them excited to learn more about your company.

Add a post gift CTA link to the gift

Add a post gift CTA to your campaign, to direct prospects who accept the gift to MOFU content like industry

specific use cases, case studies, or data sheets to help them learn the value of your product.

Send intro email announcing a gift is on the way

Make it personal. Reference their previous engagement, their personal interests uncovered by Alyce and that a gift is on its way.

Sales rep sends gift to interested prospect

Higher value gifts (\$75-\$100) tend to optimize performance with interested prospects. Make sure your message is personal, and there a clear ask.

DOES NOT ACCEPT

Rep follow-up

If a gift is not accepted right away, don't lose hope! Our most successful customers typically follow-up 3-5 times with interested people to secure a meeting.

ACCEPTS GIFT

Meeting is booked

Assuming you hook up your calendar and require recipients to book a meeting in order to accept the gift, a meeting will now appear for you!

Confirming meeting!

If a prospect books a meeting a week or more in the future, it's a good idea to send them a reminder to help ensure their attendance. Continue the conversation—ask them a question, keep them engaged.

PRO TIPS

Try switching your channels of communication during follow-up.

If you recorded a video for the landing page, include it in your outreach as well.

Remember, people are busy so it can take 6 to 8 reminders before they respond.

Lastly, make sure you use the same photo within Alyce as in LinkedIn so recipients can easily recognize you!

3 Drive Event & Webinar Registrations

SITUATION

It's difficult to get the *right* people to your events and webinars and the sales team is frustrated with the quality of your leads.

GOAL

Attract key prospects to events with an attractive invitation and provide warmer prospects to sales.

START

Select list of ideal attendees, upload to Alyce

Send email invitation letting them know a gift is on the way while teasing the ask

Send Alyce Gift with a post gift CTA directing recipient to event registration page

Prospect accepts gift

Prospect does NOT accept

END

Send personalized confirmation email

Navigates to event page and registers for event

Marketing starts follow-up cadence

END

3 Drive Event & Webinar Registrations INSIDE THE PLAY

- ✦ Up to **20%** increased event registration rates
- ✦ Up to **30%** higher increased event attendance rates

BENCHMARKS

PLAY STEPS

Identify interested people, upload to Alyce

Creating a list of moderately engaged prospects who are ideal fits for your business, who you then “warm up” a bit is perfect for this play.

Send an email invitation, mention a gift is coming and tease the ask

Make your email personal: reference the prospect’s personal interests, the gift you are sending, introduce your company and mention the call to action.

Send Alyce gift with a post gift CTA

For this play, you’re not asking for a one-on-one meeting, so a gift of lower value (\$25-\$50) is fine. Ensure your message is personal and includes a clear CTA. Finally, add a post gift CTA to your campaign to direct prospects to the event registration page upon gift acceptance.

DOES NOT ACCEPT

Marketing follow-up cadence

Even if your prospects don’t accept your gift or register right away—you still need to follow-up! Properly! Encourage registration, and start an appropriate cadence to stay top of mind.

ACCEPTS GIFT

Registered for event

If they do register for the event—great! You did what you wanted to do. It doesn’t mean your work is done.

Send personalized confirmation email

Follow-up is key to ensure attendance. Not only when they register, but leading up to the event. Tease the content to keep their interest piqued.

PRO TIP

Try sending a gift that thematically compliments your event, or will help the recipient enjoy the event experience more comfortably, like a pair of headphones, or a journal.

4 Event & Webinar Follow-up

SITUATION

A recent webinar or event went well. You want to continue conversations with qualified prospects, but it's hard to keep their attention.

GOAL

Generate meetings with prospects that have recently attended an event or webinar and create rapport that leads to an opportunity.



4 Event & Webinar Follow-up INSIDE THE PLAY

✦ Increased ROI of event and webinar programs

BENCHMARKS

PLAY STEPS

Upload your list of registrants/ attendees to Alyce

Not all registrants or attendees are equal—make sure the prospects you upload to Alyce are the high value prospects who are part of your ICP, or have already demonstrated high intent.

Send thank you email, let them know gift is coming

The day after your event, make sure to send an email thanking your prospects for attending. For those who you are gifting—let them know one is on the way.

Set up post-gift CTA

Add post Gift CTA that sends to the webinar or event recording OR the next phase of content in that customer's journey to move the relationship forward.

Send gift to prospect with required meeting action

For those that have engaged, either in person or online, for a significant period of time, it's time to prove you're highly invested in the relationship as well. A hyper-personal follow-up requiring a meeting upon gift acceptance is necessary to ensure you're moving forward together.

DOES NOT ACCEPT

Marketing follow-up

If prospects don't accept your gift right away – it's still extremely important to follow-up. Especially while you're top of mind. Add them to a cadence reminding them their gift is still available, and include a CTA to book a meeting.

ACCEPTS GIFT

Meeting is booked

Once your prospect accepts the gift, they'll book time on your integrated calendar.

Send personalized confirmation email

Getting someone to book a meeting is great—now you need to ensure they attend. Follow-up right when they book the meeting, but also make sure to follow-up the day of the meeting with a simple reminder.

PRO TIP

You can utilize personal video to make your gifts stand out. If you're sending the gifts from the event host, add a video from the host, or session leader, thanking them for attending.

5 Post-Meeting Follow-up

SITUATION

Your meeting went well—you've talked goals, timeline, additional stakeholders etc. and you're planning next steps. Share those next steps with a gift in hand!

GOAL

Move the deal forward more quickly and involve more key stakeholders and create a legitimate opportunity.

START

Meeting occurs between you and a prospect

Submit prospect for research (if not already done)

Add a post-gift CTA

Send thank you email to prospect, let them know a gift is on the way

Map account and identify other influencers

Other stakeholders

Person you had meeting with

END

Send follow-up email inviting them to join larger meeting

Send Alyce gift NOT requiring meeting but leveraging personal video to introduce yourself

Send Alyce gift requiring next meeting

Send follow-up confirmation email

END

5 Post-Meeting Follow-up INSIDE THE PLAY

- ✦ **Faster time to next steps**
- ✦ **Expanded buying teams, more access to influencers and decision makers**

BENCHMARKS

PLAY STEPS

Meeting occurs with you and a prospect

Even when a first meeting goes well, it can be difficult to move forward. Use Alyce to thank them for their time and create next steps to accelerate the process.

Submit prospect for research (if not already done)

As soon as you can, submit your prospect for research to get gift recommendations or reference the gift they've previously accepted to inform your next gift send.

Add a post-gift CTA

Once you've identified your prospects problems and needs, thank them for meeting and use a post gift CTA that drives them to content

specific to their use case or even a dedicated account page. This will help make the decision to buy your product or service even easier.

Send thank you email to prospect, let them know a gift is on the way

Send your prospect a quick email to thank them for their time, and let them know a gift is on the way.

Map Account and Identify other influencers

For complex sales, you'll need to expand the buying team by identifying other key influencers and potential decision makers at the company. Gift them too.

PERSON YOU MET WITH

Send Alyce gift requiring next meeting

After your meeting, send a gift with a personal message. Be conversational but include a clear ask for them to set a meeting to continue the conversation.

Send follow-up confirmation email

Once they've accepted the gift and booked a meeting, follow-up to confirm the date, and ask which other stakeholders they want in the conversation.

OTHER STAKEHOLDERS

Send Alyce gift NOT requiring meeting

Send the identified influencers a gift with a message letting them know you met with their colleague who suggested you loop them into the conversation. Using a Video Landing Page is a great way to introduce yourself as well.

Send follow-up email inviting them to join larger meeting

If they've accepted the gift and you have scheduled time with their colleagues, ask them to join. If a meeting hasn't been booked yet, ask if they'd be interested in setting a time.

PRO TIPS

Send a group gift to expand the buying committee, like a group lunch or even a group experiential outing.

Also utilize the "question to be answered" required action feature to continue the conversation with the recipient.

6 Pipeline Acceleration

SITUATION

The sales cycle is moving slower than you'd prefer with a high-value account. Contacts have pushed a meeting or indicated other initiatives take priority.

GOAL

Get key stakeholders back to the table, create urgency, stay top-of-mind, and jumpstart the opp.

START

Identify champions & influencers, submit to Alyce for research

Influencers

Champion

Send gift invitation for Swag Select™

Email champion letting them know gift is on its way

Send gift to all influencers with a personal video and post-gift CTA

Email influencers letting them know a gift is on the way

END

Loop in other stakeholders

Send personalized confirmation email

Meeting Booked!

Someone in Buying Team Accepts

No one in Buying Team Accepts

Sales Follow-up Cadence

END

6 Pipeline Acceleration INSIDE THE PLAY

★ Reduced time to close

BENCHMARKS

PLAY STEPS

Identify champions & influencers, submit to Alyce for research

Speed up a slow sales cycle by getting all key stakeholders back to the table. Figure out who your champion is and who the other influencers are in the deal so you can re-engage.

CHAMPION

Send gift invitation for swag

The champion is a fan of your brand, so give them a premium branded swag item to keep you top-of-mind.

Email champion letting them know gift is on its way

Deepen your relationship with the champion—send an email alerting them that a gift is on the way and you that you'd love to continue the conversation.

INFLUENCERS

Send Gift with personal video and post gift CTA to all Influencers

No deal gets done by talking with just one person. Gift the influencers you've identified to maximize your chances of moving the opportunity forward. Record a personal video to add to the gift landing pages to thank your champion for making the introduction to the new buying team members. Use a post gift CTA to introduce new members of the team to your product or service and showcase your value in an end-to-end experience.

Email influencers letting them know a gift is on the way

Let these prospects know that a gift is coming their way to build anticipation.

NO ONE IN BUYING TEAM ACCEPTS

Sales follow-up

If no one accepts their gift, don't give up! Enroll them in a follow-up cadence to stay top of mind. Timing is everything, so strike while the iron is hot.

SOMEONE IN BUYING TEAM ACCEPTS

Meeting is booked

If someone books a meeting—great! You'll see the time added to your calendar if you made meeting booked a required action.

Send personalized confirmation email

Follow-up quickly with the person who booked time with you. Ask them some leading questions, or send a proposed agenda to keep them engaged.

Loop in other stakeholders

When a meeting is booked, it's time to expand the buying team. Either ask your prospect to invite their colleagues, or reach out directly.

7 Lost Opp Re-engagement

SITUATION

It's time to re-engage lost opportunities because you feel like your company is in a better place to close these accounts now.

GOAL

Regain the attention of your key buyers or get a foot in the door at the account to restart your sales conversation.

START

Identify Lost Opps to Re-engage

Identify previous champions AND new team members

Add post-gift CTA

Sales rep sends Alyce gift to each prospect

Prospect accepts gift

Prospect does NOT accept

END

BDR or Sales Rep confirms meeting

Meeting booked!

BDR or Sales Rep starts follow-up cadence

END

7 Lost-Opp Re-engagement INSIDE THE PLAY

- ✦ Increase pipeline with previously lost opps
- ✦ Re-engage ideal customers

BENCHMARKS

PLAY STEPS

Identify Lost Opps to Re-engage

With sales, identify lost opportunities to bring back to the table. Steer clear of opportunities that were “Closed Lost” only a couple weeks ago. Go for “No Decision” lost last year instead.

Identify previous champions AND new team members

With sales, identify the key players and champions at the lost opportunities. They’re most likely to re-engage. It’s also important to target potential stakeholders, new to the account, to start a conversation.

Add a post-gift CTA

If your offering has changed since the previous closed lost opportunity,

make sure to call out the new problems you can solve and how that will be beneficial for their business! Use a post gift CTA to redirect the gift recipient to a relevant page or piece of content.

Sales rep sends Alyce gift to each prospect

To motivate re-engagement, send personal gifts to each prospect you identify, let them know why you’re reaching out and reference the previous relationship. Make sure your outreach stands out from the crowd with a personal message that leverages the insights in the research so the gift is relatable and makes a real impact.

DOES NOT ACCEPT

Rep Follow-up

If no one accepts their gift, don’t give up! Add them to a follow-up cadence to stay top of mind. A follow-up might land right when they have more time to engage.

ACCEPTS GIFT

Meeting is Booked

If someone does book a meeting with you—great! You’ll see the time get added to your calendar.

Confirming Meeting!

Follow-up quickly with the person who booked time. Ask leading questions, or set a proposed agenda for the call to encourage engagement.

PRO TIP

Kick off your intro call with everyone sharing some of their #5to9 passions to warm the group up on a personal level.

8 Customer Happiness & Retention

SITUATION

You worked hard to earn the business, don't let up now! Continue to invest in your customers to further drive loyalty.

GOAL

To deliver surprise and delight moments that drive a tighter personal bond between you and your customer.

START

Identify customers you want to surprise and delight with a moment

Leverage Alyce's personal research to find the perfect gift

Account Manager or CSM to record a personal gift video

Account Manager or CSM sends Alyce gift

Customer accepts gift

Customer does NOT accept

END

Smile delivered and emotional bank deposit accepted!

CSM or AM Follow-up Cadence

END

8 Customer Happiness & Retention INSIDE THE PLAY

✦ Increase in customer retention

BENCHMARKS

PLAY STEPS

Identify customers you want to show some love

Choose an internal champion, admin or executive sponsor you want to create a surprise and delight moment for.

Account Manager or CSM to record a personal gift video

Record a personal video to add to the gift landing pages to say hi!

Leverage Alyce's personal research to find the perfect gift

Make sure your outreach is relatable with a personal message that leverages the insights in the research so the gift makes a real impact on the

receiver. If you already know the person, find them the perfect something in the Alyce marketplace!

Account Manager or CSM sends Alyce gift

Use the Alyce research to make the note hyper personal.

DOES NOT ACCEPT

CSM or AM Follow-up Cadence

Don't worry if you don't get an accept right away. Continue to nurture that relationship in non-gifting ways, and always remember to create personal experience moments for your customers that are relevant, relatable and respectful.

ACCEPTS GIFT

Smiles on smiles!

Score! But don't forget - investing in your customers is a full time job. Continue to deliver surprise and delight moments for them when they are least expecting it.

PRO TIP

Keep note of special milestones for your customer or life events, and surprise them with a gift at unexpected times!

9 Account Expansion

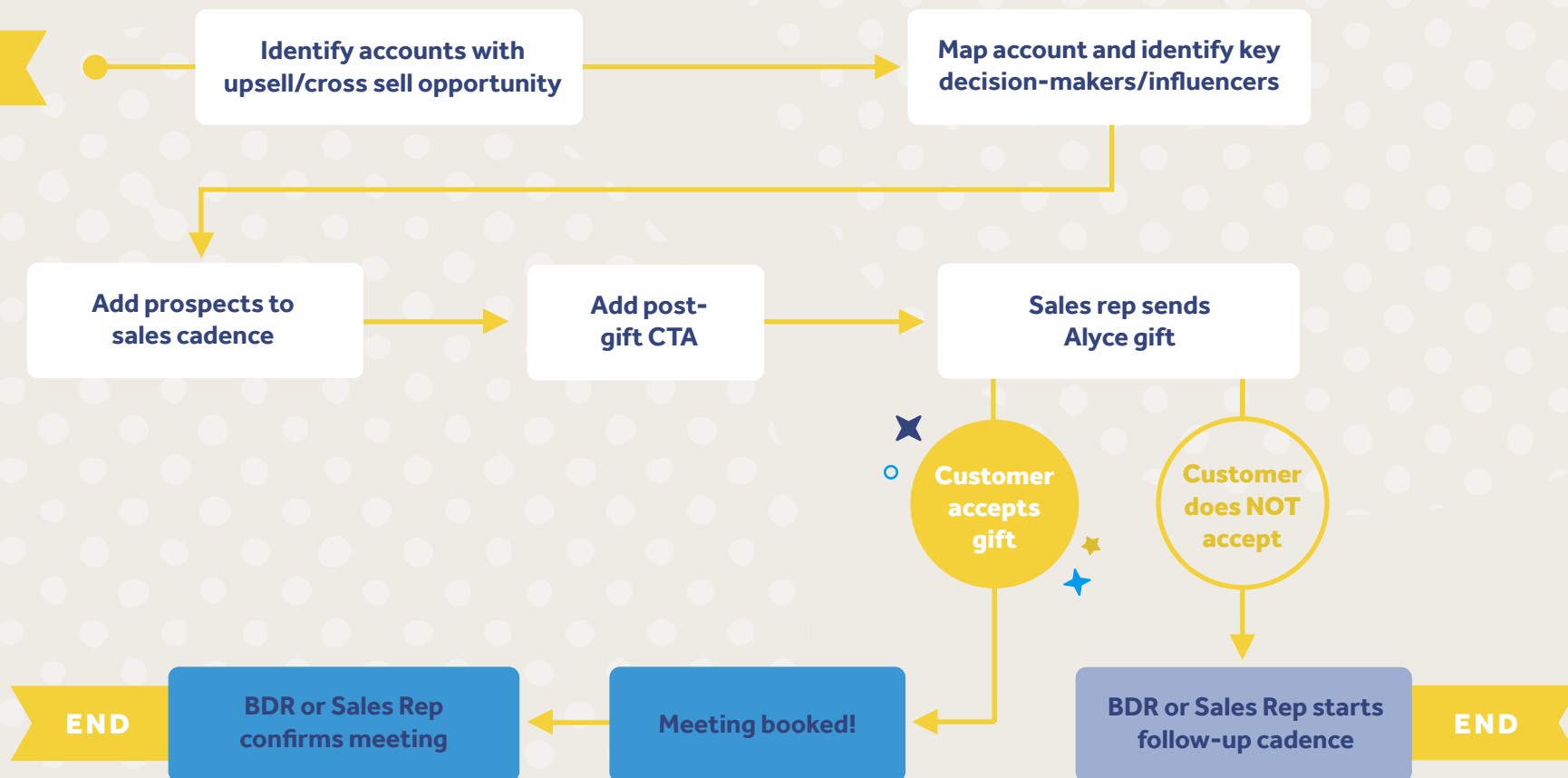
SITUATION

Things are going well but you see opportunity to expand the relationship to other parts of their business.

GOAL

Get the attention of hard-to-reach stakeholders in other parts of your customer's business.

START





Account Expansion INSIDE THE PLAY

- ✦ Increased engagement within target accounts
- ✦ Increased pipeline with existing customer base through upsell & cross-sell

BENCHMARKS

PLAY STEPS

Identify Accounts with Upsell/ Cross Sell Opportunity

With sales, customer success and account management, choose good candidates for increased business.

Map Account and Identify Key Decision-Makers/ Influencers

For complex accounts, you'll need to expand the buying team by identifying other key influencers and potential decision makers at the company. Gift them too.

Add Prospects to Sales Cadence

Since you're asking for less of a commitment than a 1-on-1 meeting, gifts of (\$25-\$50) are appropriate. Make your message personal and include a clear CTA.

Add post gift CTA

Show your customers the value of the next tier of your product or service by directing them to pricing and feature comparisons with a post gift CTA.

Sales Rep Sends Alyce Gift or swag

Email the stakeholders to introduce your company, reference their personal interests and the gift you are sending. Be clear with your intentions.

DOES NOT ACCEPT

Rep Follow-up

Don't worry if you don't get an accept right away. Continue to nurture that relationship in non-gifting ways, and always remember to create Personal Experience Moments for your customers that are relevant, relatable, and respectful.

ACCEPTS GIFT

Meeting is Booked

If somebody does book a meeting with you, great! You'll see the time get added to your calendar.

Confirming Meeting!

Follow up quickly with the person who booked time. Set a proposed agenda for the call to encourage engagement and see if others should be added to the call.

PRO TIP

Drive affinity for your brand by offering your customers an opportunity to visit your custom Swag Select™ store and choose a premium item they'll love and wear or use daily.

10

International Gifting

START

Create a list of
target accounts

Identify key prospects
within the accounts and
upload to Alyce

BDR or Sales Rep adds
Alyce to existing outreach

Rep records a personal
video to include on
branded landing page

SITUATION

Engaging with prospects with
different privacy laws is
increasingly difficult

GOAL

Create a personal experience
for your prospects in the UK and
Ireland without breaking trust or
invading privacy.

Rep selects and sends perfectly
matched Alyce gift
with a personal note

Schedule your gift to send to
in the appropriate timezone

Prospect
accepts
gift

Prospect
does NOT
accept

END

BDR or Sales Rep
confirms meeting

Meeting booked!

BDR or Sales Rep starts
follow-up cadence

END

10

International Gifting INSIDE THE PLAY

✦ Increased awareness of your brand and solution with target accounts

BENCHMARKS

PLAY STEPS

Identify target accounts

Sales and marketing align to identify ICP accounts.

Identify key prospects and upload to Alyce

Use tools such as (DiscoverOrg, Clearbit, etc.) to identify 3-5 ideal prospects at key accounts. Upload names and emails to Alyce for re-search.

Add prospect to sales cadence including Alyce

Alyce should NOT be the first touch with a cold prospect. Create awareness with traditional outreach before sending them an Alyce gift.

Schedule Your Gift

Our data shows that gifts have a higher acceptance rate earlier in the morning and late at night versus during business hours. Make sure to get in front of prospects during the optimal time in their timezone with scheduled gifting.

Rep sends Alyce gift

Because research isn't enabled for International Gifts, make sure that you're making your message relevant to your persona. Whether you want to do a quick look on their social media profiles to get a better sense for where they live, the sports teams they may support, or tailor your messaging to their recent social posts, making sure your message is relevant is the most important part of this gifting process.

DOES NOT ACCEPT

Rep follow-up

If a gift is not accepted right away—don't panic! Customers who have the most success follow-up on gifts 3-5 times before securing a meeting.

ACCEPTS GIFT

Meeting is booked

You can require recipients to book a meeting in order to receive the gift. If so, they'll book time on your integrated calendar.

Confirming meeting!

Depending on your calendar settings, your prospect may book a meeting a week or more in the future. To help make sure your recipient attends, send a reminder, ask them a question, or continue your conversation to make sure they stay engaged.

PRO TIP

If your sales team already uses video, record a custom video to use in your gifting campaigns to create a more one-to-one PX moment.



About Alyce

- ★ At Alyce, we believe the companies who get closest to their customers, win. So our Personal Experience Platform helps you get closer than ever before through one-to-one gifting.

Now that's saying something since buyers are harder and harder to reach, while purchasing less and less software these days. But we believe any technical advantage can be replicated and commoditized quickly and easily making your brand your distinguishing feature.

Competitors simply can't replicate how you make your prospects and customers feel. Personal Experience creates those personal bonds that form deep and lasting relationships throughout the customer's journey by leveraging strategic plays at opportune times.

PX transforms your outreach by substituting dull, generic, impersonal one-to-many touches with hyper-personal, truly one-to-one moments. It's a game-changer.

To learn more about using Personal Experience, head [here](#)!

#5to9

Delivering a Personal Experience means appealing to your prospect's and customer's passions, interests and hobbies outside the office. Reach the person behind the persona through their #5to9 and watch your business grow.



9-to-5: ABM SPECIALIST

#5to9: NIRVANA'S #1 FAN