



Ultimate Guide to Driving Conversions with your Gifting

Start more conversations & book more meetings



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INTRODUCTION

In the last decade or so, prospects and customers have been treated in an extremely transactional, “one-size fits all,” way. Up until recently, it hasn’t mattered if you’re the CMO of a target account with the intent to buy, or the marketing associate straight out of college—everyone was getting the same prospecting emails, cold calls, ads, and generic swag.

It’s clear that a CMO and a marketing associate should not be receiving the same experience. So how do you select the right contacts, write a compelling subject line, and draft a message that converts?

The trick to determining the experience a person should receive is a three step process:

Find the right person, at the right time, and connect over the right thing.



Determining Best-Fit Accounts and Contacts

You might have a general sense of your best-fit contacts, but unless the criteria is documented and referenced regularly, your company is either not aligned or not prioritizing contacts and accounts appropriately. The first step to determine a best-fit contact is to establish the set of criteria to identify if a person is or is not the right fit.

Here are the steps to determining that criteria:

1 Define the Ideal Customer Profile (ICP)

Establish the firmographic traits that make up your ideal customer. To begin, analyze your current customer-base. Look for commonalities such as: industry, geography, employee count, annual revenue, business or operating model.

2 Determine the Decision Makers and Influencers within the Account

Again, look inwards at your best customers to determine the economic buyers (ie, Decision Makers) and your champions (i.e. Influencers). Make note of similarities in their roles, titles, and responsibilities. Use these similarities to identify commonalities within the demographics of decision makers and influencers you should be targeting in the buying process.

3 Build Tiers of Value

Once you have the ICP and Contact criteria determined, use the firmographic and demographic data to create a hierarchy within your accounts and contacts. These four tiers are the easiest way to assess the value of your accounts:

- Tier 1:** Best Fit ICP, Best Fit Contact
- Tier 2:** Best Fit ICP, Good Fit Contact
- Tier 3:** Good Fit ICP, Best-Fit Contact
- Tier 4:** Good Fit ICP, Good Fit Contact



Finding The Right Timing to Connect with Best-Fit Contacts

Now that you've identified and prioritized the accounts and contacts with whom you'd like to do business, the second step is to layer in the most important variable—who's ready to do business with you.

While some buyers proactively come to you through inbound requests for your products and services, most aren't that explicit. However, the vast majority of buyers are leaving data signals to indicate the right time to reach out.

So how do you identify "intent?"

As we know - 87% of pre-purchase research is done by prospects online before they even talk to a sales rep (Zoominfo),

which means intent can be gauged by evaluating someone's online behavior. There are a few ways to do this:

Lead Scoring & First-Party Behavioral Data

Account-Based 3rd Party Intent Signals

Contact-Based 3rd Party Intent Signals

Once your intent signals are in place, organize your prospects based on the degree of intent these signals display. Generally, you'll want to prioritize those with high degrees of intent.

All that said, a person who is a great fit is good, and a person who is high intent is good—but neither are nearly as valuable as a person who is both a great fit and has high intent.



AWARENESS

A buyer is aware they have a problem, but unaware that your company has a solution.



CONSIDERATION

A buyer is looking to solve their problem and is aware your company has a solution.



DECISION

A buyer has begun evaluating solutions and your company is among them.



PURCHASE

A buyer has narrowed the field of solutions and is actively looking to finalize their selection.



Prioritizing The Right Contacts

With the criteria for both fit and intent determined, the next step is to identify the highest priority contacts for your business. To be a little more prescriptive, here's a full breakdown of exactly how you should prioritize the high-value contacts with high-level intent and when you should engage them with gifting:

Priority	Tier	Stage	Description
Highest	1	 Purchase	The best fit prospects who have expressed a level of intent that shows they are getting ready to purchase a solution like yours. You want to engage these people BADLY and get them on the phone.
Highest	1	 Decision	The best fit prospects who have demonstrated signals of intent that show they definitely have a pain point they're trying to address, and that they're starting to get more serious about evaluating solutions in your space.
High	2	 Purchase	Not the best fit prospects, but still really good, who have expressed a level of intent that shows they are getting ready to purchase a solution like yours any time now, and you need to get in on that conversation as soon as possible.
High	2	 Decision	Not the best fit prospects, but still really good, who have demonstrated signals of intent that show they have a pain they're trying to address, and that they're starting to get serious about evaluating solutions in your space.
Medium	1	Consideration	These are the best fit prospects who haven't quite gotten to the point where they're evaluating solutions, but they've definitely indicated that they're doing some research.
Medium	3	Purchase	These prospects are still valuable to your business, and are a good fit, but not the best. Good news is their intent signals have indicated that they're just about ready to purchase a solution to solve their pain.
Low	1	Awareness	Best fit prospects that haven't demonstrated any signal of interest (or very little.) This is essentially cold prospecting.
Low	4	Purchase	The lowest level of prospect that can be considered a good fit, who have expressed a level of intent that shows they are ready to buy a solution.



The Right Person, at the Right Time, with the Right Gift

To send the same generic communication to each tier is a surefire way for all of your upfront hard work to fall flat. Those first connections with a best-fit contact are paramount. Make sure they count by being personal.

The contacts with the highest priority deserve top tier communication. Sending “one-size-fits all” rarely works because they are impersonal, and don’t do anything to start the relationship off on the right foot. Traditional direct mail is equivalent to sending the same canned email sequences. It’s physical spam.

Where traditional DM falls flat, personal gifting delivers (🤪 pun intended.) Perfect

for building rapport and earning trust, personal gifting creates an ideal personal experience by investing into the relationship. It’s personal, it’s one-to-one, and when done well it’s the ideal way to earn most valuable commodity their time. In a world where inboxes are full and buyers aren’t answering your emails and cold calls, personal gifting has risen to the top of the ranks of the most effective methods of engaging your top prospects.

The trick to selecting the perfect gift every time is this: creating a bond through personal gifting starts with caring about the person behind the persona.

Each of us has personal interests and

passions that inspire and recharge us. Those personal interests are what makes us unique individuals. They emphasize the person beyond the job titles, responsibilities, and other blanketed demographics our personas assign to us.

We call that space—the space where you can be the person behind the persona—the #5to9™.



The Secret to Selecting The Perfect Gift

The secret to selecting the perfect gift is hidden in plain sight within the #5to9™.

To establish and build bonds with our prospects and customers, the first step is to do some research about what they do and care about in their time outside of the office.

Of course, the fastest way to conduct this research is to use [Alyce's AI-powered research and gift recommendation tool](#). But,

if you're lacking in tools to help with this #5to9 research, the most logical place to begin this search is social media—LinkedIn, Instagram, and Facebook are chock full of insights into your gift recipient's #5to9™.

When doing your own research, there are a few important things to keep in mind to prevent any uncomfortable—or confrontational—situations with your gift-giving.



SELECTING THE PERFECT GIFT



Things to Avoid when Selecting the Perfect Gift

Caring about the person behind the persona requires a crystal clear understanding of things that could cause some friction in your relationship. Remember: no matter how close you think you are to your prospects and customers, personal gifting is still a professional interaction.

Because of this, there are a few things to keep in mind as you're conducting research and deciding on a gift to compliment your recipient's #5to9™.

Here is a list of the most important things to avoid when selecting a gift:



Don't go too far back in their timeline

— If you're researching your gift recipient's #5to9™ or passions keep in mind that circumstances in their surroundings might have changed in the last two months. Anything you reference beyond two months

ago with your gift may no longer be relevant or even top of mind for your gift recipient. Gifts that reference something too far back in the past can come across as invasive or downright creepy.



Clothing is tricky

— Just like when you're picking out clothing for your friends and family, your gift can run the risk of missing the mark. Making assumptions on things like size, fit/cut, and color can make for some uncomfortable interactions.

Sending a gift that's too small or too big can come across as offensive and even hurtful.

And as much as we all wish we could pull off every shade found in the color wheel, some of us aren't quite as color-fully inclined as we want to be.

If you are opting to send clothing, make sure you're offering the option to exchange the size, shape, and color of your gift for an option your gift recipient would prefer.



Don't assume someone's gender and preferred pronouns.

— There's no faster way to alienate someone and make them feel as though you haven't gotten to know who they are at their core by using the wrong pronouns.

As you're researching your gift recipient, pay close attention to the pronouns

they use to refer to themselves. When in doubt, it's always the safest and most respectful option to use gender-neutral pronouns like they/them.

(Pro Tip: This same rule goes for pets and kids too!)



Proceed with caution: alcohol, kids, and gambling



Alcohol

Simply put - not everyone consumes alcohol. Your gift recipient could be an expectant mother or an addict in recovery. No matter the reason behind their decision not to drink, alcohol is not to be considered a “one-size-fits-all” gift.



Kids

Some parents are especially protective of the identity and security of their children. Selecting gifts intended specifically for your gift recipient’s children can infringe on that sense of security. Opting to select “family-friendly” gifts, gifts that the entire family can enjoy together, is a much safer option.



Gambling

Given that it’s legally restricted by state and federal regulations, it’s safe to proceed with caution on a gift centered around gambling.



Never send a professional gift about:

-  **Drugs or Illicit Substances**
-  **Religion**
-  **Political Affiliation**
-  **Sexual Orientation**

No matter how close you are to your prospects or customers, these topics are off-limits for professional gifts.

One final thought: the gift itself isn't as important as the context you provide about the intent, consideration, and thought behind the gift selection. Even if a gift isn't exactly what someone needs, you can still offer the Power of Choice.



The Power of Choice

The goal of gifting through Alyce is for your gift recipient to end up with something they actually want. This might mean the gift you've selected ends up being swapped or even donated in the marketplace. When this happens you're actually in a great position to build a better bond with your gift recipient.

For example:

Let's say you notice your gift recipient likes to travel. To complement their jet setter lifestyle, you opt to send them a weekender bag for their next adventure.

Upon receiving this weekender bag, your gift recipient exchanges the bag for a subscription service to Bark Box.

This small exchange told you a great deal about your prospect and what they enjoy in their #5to9™. Without telling you directly, your gift recipient just informed you that they own a dog - a fact you otherwise might not have known.

Armed with this intel, you can now begin to build a better relationship with your gift recipient by asking about their furry companion and sharing stories about your own fur-baby.



Getting Someone to Accept your Gift

— You've spent time trying to find THE perfect gift to send to a prospect or customer. You've put in the time to research what they're passionate about from #5to9 and have hand-selected a gift you think they'll love. Or you've bypassed the manual research and have used Alyce's AI to research your prospect to select the perfect gift.

Now that the gift selection is over: how do you get them interested and excited about your gift?



Just the Facts about Gift Invitation Messages

The gift invitation subject line can mean the difference between getting a meeting on the books and another email sent straight to the trash. It sets the tone of the relationship you're beginning or further developing. Not to mention, you can undermine the sincerity of the gift itself if your call-to-action is too direct or spammy.

Using our own research and analysis, this guide will help you craft the perfect gift invitation subject line—one that gets attention and drives action—to get you more opens and more chances at a booked meeting.

Throughout the course of March 2020, our BDRs sent over 1,000 digital gift invitations. Within those 1,000 invitations,

we conducted a series of experiments to measure the effectiveness of subject lines to learn what does and doesn't work.

Now, if you're an A/B test, conversion rate optimization junkie like me, allow me to nerd out with you about the experiment details really quick.

As mentioned, 1,000 emails were sent. Our team tested 10 total variations against 1 control subject line. Of the variations, 4 subject lines performed better than the control and 3 performed worse than the control, those other 3 didn't have enough data to show statistically significant change.

The results are in.



Writing an Effective Gift Invitation Subject Line

We began by comparing subject lines that were both personal and generic against the control subject line.

The first series of tests included subject lines that put the gift recipient at the center of the experience and experimented with variables such as emojis, verb selection, and shared interests. These ended up being the highest performing subject lines.

The control subject line was:

New Message — ↗ ✕

To

Subject A gift for you...

Best performing subject lines:

New Message — ↗ ✕

To

Subject Hi {name}, picked out a gift just for you! :-)

+260% increase in opens

New Message — ↗ ✕

To

Subject A gift for you and your dog

+109% increase in opens



Writing an Effective Gift Invitation Subject Line

In their second round of tests, our team used generic subject lines with vague personalization. This second round of tests severely underperformed relative to the control subject lines.

Worst Performing subject lines:

New Message — ↗ ✕

To

Subject Hey {name}! Here's a Donation

-85.8% decrease in opens

New Message — ↗ ✕

To

Subject {name}, I hope this brings a smile

-62.6% decrease in opens

New Message — ↗ ✕

To

Subject {name}, picked out a gift for you!

-17.1% decrease in opens



TL;DR - It Pays To Be Personal

A trend started to develop as we analyzed the results of these experiments. If you're too generic or impersonal, your email will be lost in a sea of sameness in your prospect's inbox.

The subject lines that performed the best held one of two components:

- 1** A relevant anecdote that oriented the gift recipient to what the gift was and why it was useful. (ie, "for your dog," "#overcomingWFH")
- 2** A one-to-one moment where the gift recipient was at the center of the experience ("Just for you").

It's important to remember you are not selling in your subject line. The most powerful subject lines—those that drive the highest results—will combine both of these components.

Our Key Takeaways:

Subject lines are the first thing your prospects see when they receive an email from you and have a huge influence over whether the person on the receiving end will open your email.

The gift message sets the tone of the relationship you're beginning or further developing. If you're too generic, your email will be lost in a sea of sameness in your prospect's inbox.

PRO TIP

Add the recipient's #5to9 interests in the subject line. i.e. "Hoping the premier league starts up again soon"



THE 3-STEP FORMULA TO WRITING THE PERFECT GIFT INVITATION MESSAGE

How to Write the Perfect Gift Invitation Message Every Time

Gift recipients are loving those subject lines, and your open rates are on the incline.

it sets the tone of the relationship, it builds rapport, and if it's crafted well it will earn enough trust to get that coveted meeting.

Now that your prospects are seeing your messages, how do you write a message in the body of the gift invitation that books more meetings?

We've broken down the 3 key ingredients to writing a message to save you the heartache of sending gifts into the abyss.

The body of your email carries a whole host of responsibilities:



Relatable and Relevant Opener

The Opener is the most critical variable in a message. It can either be an intriguing invitation to keep reading the message or a deterrent for those on the receiving end.

The Opener establishes the tone of the relationship and orients the gift recipient to the type of interaction they're receiving. The first step to writing a compelling opener is to disarm any "sales tension" in the interaction by leading with relatability and relevancy.

"Noticed you've got a race coming up, so I wanted to send you this donation to support your ride."

Relatability

Deconstructing the message above, this gift and opener is clearly meant for no one other than the gift recipient. This establishes a meaningful moment establishing a bond between you and your prospect. Not only that, but the intent of the gift also demonstrates their under-

standing and enthusiasm towards what that makes that person tick.

The gift messages that are the most relatable celebrate the #5to9™ and give the person a one-to-one moment.

That attention to detail and bond go a long way when establishing and building rapport.



The Power of Choice

“Ultimately the choice is yours so feel free to browse if you’d like to exchange the gift for something you might enjoy more.”

Respect

The ability to swap a gift for one that is more useful demonstrates how much you respect what the re-

ipient deems as valuable or useful. By giving a gift recipient the option to choose, you’re opening an opportunity for you to learn what they really care about. It’s a quick and impactful way to build rapport and earn trust with the person behind the persona.



THE 3-STEP FORMULA TO WRITING THE PERFECT GIFT INVITATION MESSAGE

STEP
3

Respectfully Make the Ask

Since you've taken the time to select the best-fit contacts and ideally you've used behavioral data to know that it's the right time to reach out to them, providing context—or relevancy—of your outreach makes it easier to make the ask.

Relevancy

Even if they like your gift, this isn't enough to motivate a gift recipient to continue to engage with you. This

final part of your message is the incentive to take action.

With click-through-rates down to 3.1%, every email you send should have a clear, value exchange for the recipient's most valued resource - time. Your message should be crafted to drive relevancy and urgency to the problems you can solve together in their 9:00 am to 5:00 pm.



THE 3-STEP FORMULA TO WRITING THE PERFECT GIFT INVITATION MESSAGE

Subject Line

New Message

To adam@company.com

Subject This semi-charmed kind of life...

Hey Adam,

Noticed that you're a Third Eye Blind fan so I thought you might enjoy this gift to jam out to! Whether you choose to accept the gift, exchange it or donate the value to charity, the choice is yours!

Running the event marketing team at Calendly in the midst of this digital transformation has probably changed up your sheet music a bit. With the event cancellations left and right, our customers are relying more and more on our ability to create personal experiences at scale and drive new business meetings in their digital event efforts.

Would you be interested in knowing more?

Stay safe and enjoy the gift!
Maartje

1 Opener with Relatability and Relevancy

2 The Power of Choice

3 Make the Ask



Four Steps to Driving Conversions with your Gifting

They say that actions speak louder than words, and the action you take before you officially send your gift makes all of the difference to increase your conversion rates. A well-executed personal gifting strategy will make all the difference in booking more meetings. These four elements are your key to success:

1

Identify the right contacts using segmentation and intent

2

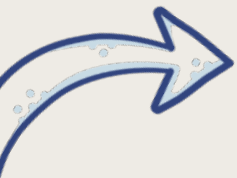
Select a gift that compliments your prospects #5to9™

3

Write a subject line that's relevant and one-to-one

4

Use relatability, relevancy, and respect to compose a message that drives action



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