A Beginner's Guide on Sending Platforms

Everything you need to know about using personalized sending to build and grow business relationships.





















Sendoso, the leading Sending Platform, is the most effective way for revenue-driving teams to stand out with new ways to engage at strategic points throughout the customer journey. By sending personalized gifts, branded swag, and eGifts at scale with Sendoso, you'll see significant time savings per campaign, an increase in conversion rates, and higher retention rates.



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Relationships Matter Most

The world may change, but building authentic relationships never will. No matter what is happening in the world, one thing will always be true in business: Relationships matter most.

New digital tools pop up every day, promising to keep you connected to your customers and prospects. But the more tools and platforms there are, the more fragmented communication with stakeholders gets. That makes it harder than ever to build and maintain relationships with the people who are important to your business.

What's worse, it can be a major challenge to use solely digital tools to maintain genuine connections. It's too easy to reduce people to an avatar and a customer number.



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And yet, true human connection drives trust and relationships. By getting to know someone, and the opportunity to show off that you know them through personalized gifts, you can drive deeper connections with customers. That's why sending customized direct mail, gifts, and swag have always been a powerful way to engage people. Research from our **2021 State of Sending** shows that:



of senders said they've experienced increased opportunity creation from sending.



of senders said they've experienced increased close rates from sending.



of senders said they've experienced increased campaign ROI from sending.

Since the Covid-19 pandemic, the amount of digital messaging has grown exponentially. And while digital channels are certainly convenient and immediate, many customers have experienced digital fatigue, spending nearly <u>eight hours a day with digital media</u>. Indeed, with the explosion of digital messaging in a post-Covid world, <u>sending tangible</u> items can help businesses find authentic ways to connect with customers and prospects.

Businesses are taking notice. According to our research, each company's amount of sending increased an average of 45% from 2020 to 2021. We only expect to see this grow as customers increasingly grow weary of digital communications.

Sending increased an average of 45% from 2020 to 2021.

Why Send?

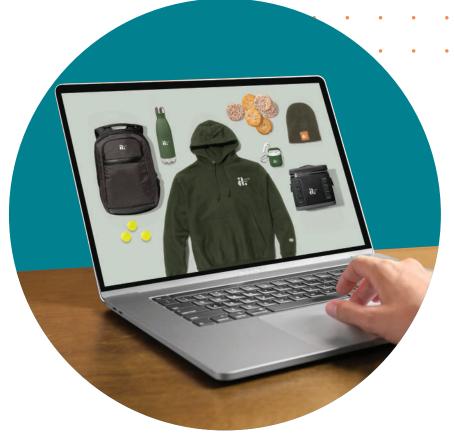
With all the digital tools available to us today, it's only logical to wonder, why send anything at all? After all, sending direct mail, corporate gifts, or branded swag isn't anything new. But in order to have a successful customer engagement strategy, it's necessary to take a more strategic, creative approach.

The truth is that people crave real, authentic connections. And that's exactly what integrating a Sending Platform into your overall marketing strategy and workflow will do.

Following are three key reasons why you should send to your current and prospective customers.

1. Increase brand awareness: Brand awareness is the level of prospective customers' familiarity with your brand. They may or may not have formulated an emotional response or connection to your brand at this stage, but oftentimes, just being aware of a brand paves the road for future communications.

Creating brand awareness is essential for developing interest in your products or services. Sending on-brand, personalized gifts, swag, or even handwritten notes gets your brand in front of prospects and helps you stand out, a critical first step in making your brand memorable.



2. Build relationships: Sending isn't only about giving customers and prospects gifts. In fact, it's not the gift itself that matters most.

The key factor to successfully building a relationship is getting to know someone and demonstrating that knowledge. As such, **personalization** is essential for anything you send, be it a physical or digital item. This can be as simple as printing someone's name on a sweatshirt, but it could also be something the recipient truly wants. Personalizing gifts according to the recipient's tastes and interests is far more meaningful than simply putting their name on something. For example, you might learn that a customer loves a specific restaurant. Send them a gift card (digital or physical) to showcase your interest in building a relationship with them.

3. Achieve results (ROI): Ultimately, developing authentic relationships has an impact on the bottom line. Deeper relationships are far more likely to result in new and repeat purchases. By helping organizations stand out at strategic points throughout the customer journey, sending can boost the volume of pipeline opportunities, brand recall, and thus revenue and return on investment (ROI).

Because people are generally inundated with digital brand communications, sending on-brand gifts can also dramatically boost the efficacy of other communications. These can be thematically aligned with a specific campaign, or even aligned with a current event. For example, **one Sendoso customer sent out UberEats eGifts** to cold prospects just as the pandemic was hitting. It turned out, clients loved this so much that it became a normal part of the customer's cold outreach process and today accounts for 40% of the company's cold outbound meetings. The same company also conducted a campaign that sent cupcakes (yum!) to prospects, which resulted in a 5x response rate compared to outreach without a gift.



Click Here for More Case Studies on Other Effective Sending Ideas.

Integrate Sending Into Your Marketing Strategy

Like all marketing activities, sending needs to be done strategically in order to get the best bang for your marketing buck. To achieve this, marketers should look to Account-based marketing (ABM) to effectively integrate sending into the overall marketing mix. ABM is a valuable approach for getting in front of your most valuable prospects and customers, enabling marketers to maximize both ROI and customer lifetime value (CTV).

Today's marketers are now recognizing a greater need for ABM approaches to deliver a more personalized customer experience. ABM is extremely effective when you have a highly targeted customer base, such as C-level executives at airline companies. ABM can help you get in front of and move this targeted group through the sales funnel.

ABM and integrated sending are extremely effective at helping you get in front of a highly targeted customer.



And that's where sending comes in. Sending can help you through each phase of the sales funnel, delivering value at each step that moves customers to the next one.



Top-of-funnel: Sending can be an effective tool to drive brand awareness at your targeted accounts. If your goal is to encourage prospects at targeted accounts to book a demo, for example, you could send a handwritten note introducing your brand and a follow-up email to book a demo. The personal touch of a handwritten note will increase the likelihood for them to respond to other communications afterwards.

Mid-funnel: After your targeted accounts are aware of your brand, it's likely they're evaluating your product against their current needs. Sending is a great way to differentiate yourself from your competitors, especially now when your competitors are all vying for your customers attention online. Use sending to reward a prospect or customer's engagement with your company, such as sending an eGift for coffee and a quick thank you note to a prospect, or to a customer who attends a webinar.

Bottom-of-funnel: By the time prospects reach the bottom of the funnel, they've taken the time to understand your company and its products or services. Sending them personalized direct mail and gifts is a powerful way to convert them to paying customers. Once they become customers, you can also send them gifts prior to renewal or other key stages of the customer lifecycle to increase product adoption and even turn them into advocates.

What is a Sending Platform?

A Sending Platform[™] is a SaaS solution that integrates into your existing tech stack so your sales, marketing, CX and others can deliver Physical Impressions[™] at strategic points throughout the customer lifecycle. By integrating your Sending Platform, you can easily measure the ROI of sending campaigns, seeing how they impact all other related activities. The power behind a Sending Platform comes from the fully automated fulfillment and logistics service that assures quality and on-time delivery.

In the past, organizations have relied on separate pieces of software to automate varying parts of the sending process, including:

Direct mail automation: Sometimes called tactile marketing, direct mail automation allows sending for small and large groups of audiences. It is used by marketers to engage prospects and customers offline through the sending of printed mailers, marketing materials, or other physical items. Marketers typically use direct mail for one-to-many campaigns, connecting with both prospects and clients in a meaningful way. That said, relying on one-to-many direct mail alone won't create a deeper level of personalization at scale.

The challenge: Relying on one-to-many direct mail alone won't create a deeper level of personalization at scale.



Physical Impressions™ are any experience or tangible item that you can interact with offline. Some examples of Physical Impressions™ include a piece of collateral or swag item you may have taken home from a tradeshow, branded cupcakes sent to your office that can be shared with your entire team, or an eGift card you could redeem for a cup of coffee.



Corporate gifting software: Corporate gifting tools, or personal experience platforms, creates touchpoints with clients or prospects through gift-giving on a one-to-one basis. Gifts can be physical or digital, such as branded swag, edible treats, personalized clothing, eGifts, airfare, concert tickets, etc. These gifts can drive responses and reward behaviors, such as rewarding a customer for a referral, completing a download, attending a webinar, etc. Gifting is a common practice routinely used by sales, SDR, and customer experience teams to quickly develop customer relationships and loyalty.

The Challenge: Using a corporate gifting tool by itself provides little opportunity for any timely follow up. Lack of delivery confirmation or other insights can hinder that perfectly timed follow-up phone call.

Swag management platform: Often used by events, HR, or customer teams, swag management tools give you the ability to store, manage, and ship company swag or branded merchandise.

The Challenge: Unless you have an extremely established and recognizable brand like Nike or Apple, sending swag alone gives you little opportunity to stand out or make connections with interested prospects and customers. Without integrating your branded merchandise sends with a sales funnel approach, your gifts could be falling on deaf ears.

The Solution: A Sending Platform

Because there are a wide variety of ways to use sending, Sending Platforms have risen in popularity in recent years as more companies are discovering it's more efficient to utilize an all-in-one platform that integrates direct mail, corporate gifting, and swag management with other marketing initiatives while delivering personalization, handling fulfillment, and measuring ROI–all with the click of a button.

What Can Sending Platforms Do?

The best Sending Platforms should have all of the following five capabilities.







1. Limitless Sending Possibilities

The best Sending Platforms support sending direct mail, personal gifts, corporate swag, and everything in between (eGifts, handwritten notes, plants, wine, and so on). They should also allow you to send those things to an individual, to a group of people, or to a large audience in bulk. Platforms that only support certain types of sends and audience sizes do not allow you to create truly custom experiences for your audience and don't scale with you.

2. Seamless Integrations

An effective Sending Platform integrates with software you're already using and working with, from marketing automation and sales acceleration to HR software and CRM. That ensures a low learning curve and high adoption among different business units.

Check out our **evolving list of integrations**.

3. Worldwide Fulfillment & Inventory Management

A true Sending Platform has international fulfillment capabilities and the ability to send eGifts in multiple currencies. It should provide a real-time view of inventory so that you can reach your recipients no matter where they are and have the option to confirm their best address.





4. Intelligent Analytics & Reporting

Most importantly, a Sending Platform must track and measure your sending campaigns' effectiveness. A good Sending Platform delivers high-level, visual summaries of exactly where your sends are in each step of the process. It alerts you when a package has been delivered, an eGift has been used, or an item is undeliverable, and provides the ability to **calculate ROI**. The analytics should both be able to help you orchestrate strategic sending and measure overall campaign performance.

5. Scalability Across Teams & Budgets

A high-quality Sending Platform can easily scale across multiple teams and departments. They should offer budget control tools and the ability to assign unique budgets for each department. The platform should also allow you to set monthly volume and spending allowances that expire or rollover at the end of the month, or to set one-time budgets and refill them whenever needed.

Who Is a Sending Platform For?

Sending Platforms enable each and every go-to-market or customer-facing team in your company to attract, engage, and retain customers. A best-in-class sending solution is capable of assigning individual teams budgets and specific sending options based on what may be most effective for those departments. It should include the ability to add, edit, or remove sending options with ease–keeping each team's sending campaigns fresh and relevant.

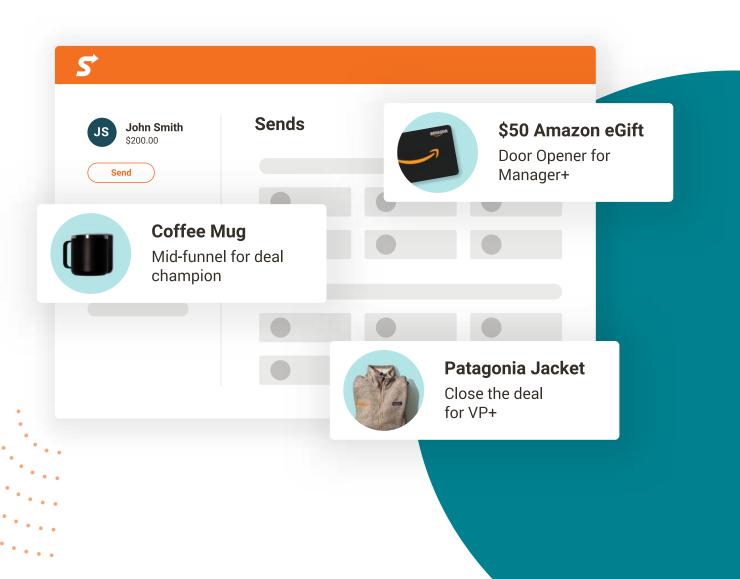
How Some of Our Customers Use Sendoso

The chart below shows how different teams integrated Sendoso's Sending Platform into their unique use-case scenarios.

TITLE	CHALLENGES	SOLUTION / USE CASES	RESULTS
SALES	Finding new ways to capture attention and accelerate the sales cycle.	Reduce time to closed wonIncrease pipeline activityIncrease close rates	SmartRecruiters saw that deals with Sendoso closed 50% faster than those without.
SDR / BDR	Getting prospects to respond because they're fatigued by digital touchpoints.	 Increase meeting show rates Increase response rates Increase conversion from cold lead 	<u>Chili Piper</u> saw a 33% increase in meeting show rates with Sendoso eGifts.
ACCOUNT-BASED MARKETING (ABM)	Identifying and engaging target accounts with personalized experiences.	 Break into target accounts Increase lead-to-opp conversion Reduce cost of customer acquisition 	<u>Uberflip</u> added Sendoso to their ABM approach. As a result, they generated more than 30x ROI and 200% return on closed revenue.
FIELD MARKETING / EVENTS	Drive event attendance and generate leads from events (online and in-person).	 Increase attendance rates / lead capture Increase response rates to follow-up nurture programs Drive revenue from event leads 	Arctic Wolf used Sendoso to send UberEats eGifts to registrants prior to a virtual event, and saw an outstanding 72% attendance rate (1.3x the industry average). This influenced 41 opportunities that generated millions in pipeline.
сх	Improve customer retention by personalizing customer journey.	 Increase customer engagement Increase retention rate Increase meeting show rates 	OneLogin partnered with Sendoso to send "milestone" gifts that included welcome packages, anniversary gifts, and gifts designed to engage customers ahead of renewals or upsells. They obtained 22x ROI from a closed-lost re-engagement campaign, and a 21x ROI from an opportunity acceleration campaign.

Choosing the Right Sending Platform for You

Sending Platforms are extremely effective for a variety of reasons, but choosing the wrong platform for you and your team could be a very costly mistake. It's important to invest time evaluating the capabilities and costs of all your options to ensure you choose the perfect platform for your business.



How to Evaluate a Sending Platform

I want to implement a Sending Platform. How do I start?

A Sending Platform is a big investment that often requires approval from several different people within a company—and sometimes an entire evaluation committee. You'll want to make sure any new software you're investing in is the right product for your company, fits all your team's needs, and does all the things the vendor says it can do.

What questions should I ask when making a decision?

Asking the right questions can make or break your evaluation process. Here are some critical questions to ask, formulated around potential needs for a Sending Platform.

Use Case Questions

- How does the platform help create relationships and relevant experiences across the entire customer lifecycle?
 - How can marketing teams use this for demand generation and ABM?
 - How can SDR teams use this to open doors and drive meeting attendance?
 - How can sales teams use this to accelerate sales and win back deals?
 - How can customer teams use this to drive retention and upsells?
 - How can our teams use the Sending Platform warehouse for swag management?
- How does the platform generate and report on ROI?
 - Are there case studies and success metrics from customers in your industry?
- Is the company funding by investment or other means? How can they demonstrate financial stability?



Integrations Questions

- How many integrations does the product have?
 - Does the solution integrate with Sales Engagement Platforms including Salesloft, XANT, and Outreach?
 - Does the solution integrate with Marketing Automation Platforms including Marketo, HubSpot, Eloqua, and Pardot?
- Are integrations an important part of the platform's roadmap?
- Can the platform report on the ROI and success of campaigns in my other tools?
- Can the platform use data from other tools in my tech stack to trigger or execute a send?

Platform Questions

- Does the platform scale to meet my program needs across one-to-one, one to-few, and one-to-many use cases?
- Can the platform create hyper-personalized one-to-one sends and customized handwritten notes?
- Can the platform pass my company's security and compliance requirements?
- Is the platform GDPR and SOC 2 compliant?
- Does the platform offer single sign-on options for my integrations like Okta, GSuite, Azure, and OneLogin?
- Does the platform allow me to time my outreach and follow-up perfectly with visibility into the status of my sends?
- Does the platform have a global footprint for international eGifts?
- Does the platform have the ability to donate gifts or funds to charitable causes?
- Does the platform have a product roadmap?
 - Is there a vision for innovation and optimization?

Warehouse Questions

- What is the vendor's logistical expertise?
- Can the platform help me source items for sending and does it work with my existing vendor network?
 - Am I limited to items within the vendor's preferred network or will they help me source items?
- Can the platform store our collateral, branded swag, custom packaging, or anything else we'd like to send to customers and prospects?
- Can I view our inventory in real-time, send more inventory to our warehouses with just one click, and set alerts for low inventory so my items are never out of stock?
- Does the platform use different shipping carriers, including USPS, UPS, FedEx, and DHL, and others?
- If my business has a global presence, how many countries does the platform ship to?
- Does the platform include the ability to work with any vendor?
- Does the platform offer warehousing in EMEA / APAC and the U.S.?
- Does the platform offer the ability to ship perishables including cupcakes, wine, boxes, and more?
- Is the platform able to reach customers worldwide and in multiple currencies?



9 Warning Signs of a Bad Sending Platform

In addition to everything a Sending Platform **should** do, make sure you avoid any major red flags by confirming what the Sending Platform you're evaluating **can't** do.

Warning Sign No. 1: The vendor doesn't have case studies or ROI metrics across the customer lifecycle.

Any Sending Platform can claim great results and ROI, but not having the measurable data and ROI metrics to prove their success is a huge red flag. Ask for verified customer case studies that highlight successes across the entire customer lifecycle to assess whether the product is trustworthy and effective.

There are plenty of companies who "talk the talk," but you shouldn't purchase a Sending Platform without being able to accurately define success or measure ROI. For example, our customers benefit from what we call "The Sendoso effect," which we define as the average increase in the lead-to-opportunity rate that we see in our customer after they onboard Sendoso.

Warning Sign No. 2: Few or no integrations.

Nobody wants another standalone tool to learn. A Sending Platform should enable teams to easily create, click, and connect from wherever they already work, be it Salesforce, Outreach, Marketo, or other marketing, sales, or service platforms. What's more, integrations should be seamless, allowing you to set up automated workflows. If your Sending Platform can't integrate, it will be much harder to implement.



Warning Sign No. 3: The solution can't scale with your business.

Getting a sending strategy off the ground takes coordination from multiple teams. Solutions that aren't flexible or have limitations can only get old quickly, likely leaving you struggling to fill your pipeline. A better solution will adapt to your business's changing needs. Ask for details on how the solution you're evaluating can grow with your team.

Warning Sign No. 4: Limited sending possibilities.

There are only so many branded stress balls a recipient can use. If a Sending Platform doesn't offer the ability to create, store, and ship uniquely branded direct mail, company swag, customer gifts, dimensional mailers, custom branded packaging, handwritten notes, or highly personalized items, keep looking.

Warning Sign No. 5: Makes you pre-pay for sends.

Sending shouldn't be treated like a refillable gift card (though those certainly make great sends!) The best sending platform only charges you for what's actually going out. Find a platform that has special features such as **Address Confirmation** that ensures whatever you are sending makes it to the recipient.

Warning Sign No. 6: Companies that claim to use AI for personalization.

Be wary of any Sending Platform that says they're using Al to personalize sending experiences. Chances are, they're not. What they're most likely doing is automatically pulling gifting suggestions from the social media accounts of prospects—which potentially violates privacy regulations (it's also a little creepy).

Many people don't regularly update their social media accounts so information on them can sometimes be outdated. Plus, who really likes sharing details of your family / personal life with unsolicited companies? Instead, find a solution that helps you build a genuine connection with prospects and uses the power of personalization responsibly.

Note: "Personalization" is a loaded term. It's often generic, because it can easily be replicated. Most companies rely on LinkedIn profiles or other publicly available information to personalize their approaches. This means you and all your competitors are doing the same thing. Here's one example of <u>Sendoso's approach to personalization</u>.

Warning Sign No. 7: No international sending options.

If a Sending Platform is only able to send within the US, you could be missing out on hundreds of thousands of opportunities to engage with customers abroad. And if your company has international offices, your clients in those countries will be missing out as well. Plus, international shipping fees are extremely expensive, making a platform with a global footprint and local vendors around the world a key part of your sending strategy.

Warning Sign No. 8: No real-time view of inventory.

Let's say you've done research on your prospect, determined the perfect door-opener for them, found their correct address, and are all set to send your gift. When you go to click send, the Sending Platform says your gift is out of stock! Now you'll have to start all over again.

Don't let that be you! Make sure your Sending Platform presents inventory in real-time, can reorder inventory for you at the click of a button, and alerts you if you're running low on any particular items. This will ensure you know exactly what your sending options are every time.

Warning Sign No. 9: No way to pre-approve sends.

Managers at your company should be able to maintain control of dollars spent and have the ability to create teams and assign unique sending options for each department. Your Sending Platform should give you the flexibility to set monthly sending allowances that expire or ones that roll over at the end of the month. It should let you set one-time budgets and refill them whenever needed.

Customer Reviews

When comparing Sending Platforms, it's a good idea to seek out third-party reviews as well as customer testimonials. Popular software review sites like G2 rank products against each other, giving you impartial insight into how platforms perform.

This chart from <u>G2 lists Sendoso as a leader</u> amongst competitors in Account-Based Execution. We've been named a leader in:

- Account-Based Direct Mail Software
- Direct Mail Automation Software
- Product Management Software

In addition, Sendoso also holds G2 badges for being one of the **fastest growing companies**, having the **best usability**, and being the **most implementable**.

What Does Being a G2 Leader Mean?

When a company is leading a category on G2, that means out of every platform that qualifies to be included, that organization has the highest customer satisfaction and market presence scores.



Customer Success Stories

Another way to gauge whether a software is up to your standards is to check out their case studies. How are customers using the platform, what are they saying about it, and most importantly, how are they measuring the product's ROI? Any Sending Platform worth your investment should easily be able to show you how customers are actively seeing measurable success.

Here are some examples of how companies are sending direct mail, eGifts, and branded swag to generate measurable results on our platform.





Strategy

Drive brand awareness with top prospects by sending a custom box with branded cooking utensils and a printed "recipe" book. The "recipe" book included ABM strategies that were described by using food and cooking metaphors.

Result

\$3.1M in pipeline driven by Sendoso campaigns

\$322K in revenue recognized since the start of 2020





Strategy

Engage C-level buyers by sending physical copies of their **new guide to their home addresses via Address Confirmation** due to COVID-19.

Result

84% of COOs responded with Address Confirmation





Strategy

Drive attendance to their virtual event "coffee connection" hosted by their CEO by sending Starbucks eGifts the day before the event.

Result

60% virtual event attendance

Read <u>here</u> for even more detailed information on Sendoso customer success stories.

References and Testimonials



Finally, be sure to ask for references and testimonials that speak to why you should select that vendor's platform over others. Here are some good examples of customer testimonials:

"Getting involved with a Sending platform should be prioritized over other things because of the decaying efficacy of other channels. The name of the game in marketing is finding new, unsaturated channels for your message. So offline sending not only allows you to access an under-utilized channel, but a sending platform allows you to access that channel in a way that would otherwise be too costly, too time-intensive to access. When you're evaluating a sending platform, the most

important thing to ask is, 'Does it hit all different parts of

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the funnel?""

Peter Kazanjy
Founder
atrium

"Sendoso is the only marketing technology I've ever bought where the Sales team came over and told me how grateful they were for it. You can use Sendoso however fits your style the best. The fact that I can put a budget on it, control my costs, and empower the Sales team to go wild until they've spent their allocated money is really fun for everyone. In a pretty short time between the big campaign that marketing's doing and the one-to-one interactions the sales team has done, we've already influenced one million dollars in pipeline and its been really fun to do the whole because we get to create a really unique and powerful experience—and that's really a marketer's favorite thing to do."



Justin Keller
Vice President of Marketing

Tterminus



"I'm the Director in Inbound Sales at Choozle.

I've worked with hundreds of clients and

Sendoso crushes! Just a few clicks and you
can send cookies, or coffee, or lunch, or even a
handwritten letter! Sendoso is the best gift giving
application I've had in 17 years of corporate sales
and work-life experience!"



Michael Fischer
Director in Inbound Sales
Choozle

"I use Sendoso to go above and beyond to build relationships with my customers. I love the personal touch we are able to bring. With so many different options to choose from, it allows us an opportunity to connect on another level when we can't always be there in person. **Sending a personalized gift has never been so easy.**"



Brooks Hahn
Customer Success Manager

Salesi oft

In the end, choosing the best Sending Platform is about finding one that best aligns with your needs and can help you achieve whatever your success metrics are—and not what your vendor's needs and success criteria are. We hope you found this guide insightful and informative. Best of luck on your search, and happy sending!

About Sendoso

Sendoso, the leading Sending Platform™, is the most effective way for revenue-generating teams to stand out with new ways to engage at strategic points throughout the customer journey. By connecting digital and physical strategies, companies can engage, acquire, and retain customers easier than ever before. Founded in 2016, Sendoso is trusted by over 500 companies and has a vast global footprint, with a presence in North America, Europe, and Asia Pacific. Learn more at **sendoso.com**.

