The Year-End Gifting Guide:
How to Surprise and Delight

This strategic checklist is a proactive guide to help you plan for those special, end-of-year moments that make your clients and team members feel seen, valued, and appreciated.

Phase 1:
Start with Strategy

- [ ] **Define Your "Why"**
  Why are you giving gifts this year? Knowing your purpose will guide every decision.
- [ ] **Set Your Budget**
  Establish a clear, realistic budget for client gifts and internal team recognition.
- [ ] **Segment Your Audience**
  Create gifting tiers based on relationship length, revenue, or strategic importance.
- [ ] **Create Your Recipient List**
  Gather all contact information, including physical addresses, email addresses, and any personal preferences, to make personalization easier.

Phase 2:
Idea and Execution

- [ ] **Focus on Personalization**
  A gift that feels personal and thoughtful can be far more powerful than generic swag.
- [ ] **Consider Timing**
  Send gifts in late November or early December to stand out.
- [ ] **Draft Your Message**
  Always include a note! It's a personal touch that makes all the difference.
- [ ] **Finalize and Order Your Gifts**
  Make sure to account for lead times, especially if you're ordering custom items or buying from small businesses.

Phase 3:
Follow-Up and Feedback

- [ ] **Track Your Shipments**
  A quick, friendly email to let them know a gift is on the way is a nice touch.
- [ ] **Be Prepared to Respond**
  If you receive a thank you, don't forget to respond.
- [ ] **Reflect and Refine**
  What worked? What didn't? Gather feedback and save your insights for next year.

Bonus Resource:
Gift Ideas to Stand Out

Scan the QR code to discover our favorite creative gift ideas!