



# Streamline Your Client Gifting Process in 17hats

MARKETING STRATEGY FOR SMALL BUSINESS



17HATS.COM



# Bonus: Marketing Tips

## Overview

Marketing is essential for small business owners. But few make the effort. Why is that? Mostly because we tell ourselves we don't have time, we overcomplicate it, don't plan for it, or just don't know how to. *Here are some tips to help you start your marketing plan.*

## Top-of-Mind Awareness

Top-of-Mind Awareness is the easiest and cheapest marketing channel there is for a small business owner. The idea behind it is that you should maintain certain touch points with clients that fit your ideal client profile, with the goal of them becoming fans, talking about you, and referring you to their colleagues and friends.

## Touch Points

**Social Media Shout-Out** - Use social media to connect with your clients. To maintain professionalism, create a business profile or business page.

**Letters of Appreciation** - Whether you have one person or 20 people on your VIP and Favorite list, those people have been vital to your business. Thank them by telling them how much you appreciate them!

It is the smallest gesture that can make a huge impact. Remember, when you invest in the right client, they will invest in you.

*Examples: Send thank you cards after a project and holiday cards each year.*

**Gift Your Clients** - Gifting your clients can become a big marketing move, as it becomes the "rave worthy" experience clients talk about. We highly recommend gifting each year, even if it is something small with a handwritten note.

*Over the next few pages is a guide to creating a "Gifting Process" plan.*



# Bonus: Marketing Tips

## Build Your Gifting Process

**Create Your Policies** - With a bit of planning, you can streamline the process so that gifting your clients becomes easy to do. Remember, you do not have to spend a ton of money on gifts, and by planning ahead you will be able to keep your eye out for deals and ideas.

### Thank You Gift Timeline

I will send gifts ...

\_\_\_ once a year \_\_\_ twice a year \_\_\_ quarterly

### Thank You Gift Policies

\$\$\$

If a client spends \$\_\_\_\_\_ or refers \_\_\_\_\_ clients,  
they will receive a gift valued at \_\_\_\_\_.

\$\$

If a client spends \$\_\_\_\_\_ or refers \_\_\_\_\_ clients,  
they will receive a gift valued at \_\_\_\_\_.

\$

If a client spends \$\_\_\_\_\_ or refers \_\_\_\_\_ clients,  
they will receive a gift valued at \_\_\_\_\_.



# 17hats - Member Tips

## 1. Project Page and Marketing Calendar

- ▶ Create your Marketing Calendar in 17hats Account Settings
- ▶ Create a Contact (Your Name) and Project (Thank You Gifts)  
*Note: To lessen confusion, don't add an email address to your Contact*
- ▶ Add Date - when you will send your Thank You Gifts
- ▶ Add Notes - ideas for gifts, policies for gifts
- ▶ Add Files - screenshots of different gift ideas
- ▶ Add Workflow - remind yourself to research, buy, and send gifts

Now sending your VIPs a thank you gift will become a stress-free task!

AR

## Amanda Rae

NEW PROJECT
CONTACT DETAILS ▾
EDIT

Client Portal:


COPY LINK
VIEW CLIENT PORTAL
EMAIL LINK
▾

**WHAT'S COMING UP IN THE NEXT 7 DAYS** CREATE NEW ▾

AUG  
14

**Workflow: Marketing - VIP Gifts**  
Research End of Year Gifts

**IMPORTANT DOCUMENTS** CREATE NEW ▾

No important documents.

**NOTES** | EMAILS | FILES | TO DO | EVENTS | PHONE LOG | TIME LOG | ACTIVITY

+ Add a new note

---

DEC  
01

Policies: Gift is 5% worth of total spent

Spends \$5000 - receive a \$250 gift

Spends \$1000 - receive a \$50

Spends less than a \$1000 - holiday card

Today at 7:04pm

---

DEC  
01

Possible Gifts

<http://chasinglockets.com/>

<https://www.planetjill.com/>

Today at 6:56pm

**PROJECT: THANK YOU GIFTS**

Primary Email:	Unknown
Project Date:	December 12th
Location:	Office
Phone #:	Unknown
Address:	United States
Type:	Client
Budget:	\$2,000.00
Calendar:	Marketing
Tags:	Marketing Project

**WORKFLOWS** +

Active Workflows:

Marketing - VIP Gifts

**FINANCES UP TO DATE**

No invoices paid or expenses created for this project yet.

**RELATED CONTACTS** +

No related contacts yet.


4 17hats.com




# 17hats - Member Tips

NOTES   EMAILS   **FILES**   TO DO   EVENTS   PHONE LOG   TIME LOG   ACTIVITY

Upload a file

 **File name:** [Screenshot 2018-12-01 18.58.54.png](#)  
**File size:** 276 kb  
**Uploaded:** Dec 1, 2018 at 6:59 PM

 **File name:** [Screenshot 2018-12-01 18.58.48.png](#)  
**File size:** 449 kb  
**Uploaded:** Dec 1, 2018 at 6:59 PM

## Marketing - VIP Gifts

[← Back to Workflows](#)

### Marketing - VIP Gifts

ADD ▾



#### Research End of Year Gifts

When: 120 days before the base date  
Assigned to: Doug Walker



#### Decide who gets what

When: 45 days before the base date  
Assigned to: Doug Walker



#### Order Gifts

When: 30 days before the base date  
Assigned to: Doug Walker



#### Wrap and Send Gifts

When: Immediately on the base date  
Assigned to: Doug Walker



Get your 17hats  
“Marketing - VIP Gifts”  
Workflow template.

Use Import Code:  
**HHXFGK**

Import directly into your  
17hats account.



# 17hats - Member Tips

## 2. Contacts

Add all your Contacts to 17hats: vendors, marketing partners, leads, and clients.

Having quick access to email, phone numbers, addresses, and social media makes dropping a note or popping in to say hi quick and easy.



### New Contact

Show as a company ?

Name: Robin Smith

Company: (optional)

Contact Type: Client

Email: robin@me.com

Phone: (879)234-3434

Title: (optional)

Tags: VIP x 2021 x (optional)

Cancel

Save

### Tag Your Contacts

Tag your VIP Contacts in 17hats for easy access.

- ▶ VIP
- ▶ Year
- ▶ Revenue Stream



# 17hats - Member Tips

## 3. Transaction Category

Keep your bookkeeping organized so you know exactly where your money is going.

Go to your 17hats ...

- ▶ Account Settings
- ▶ Money Matters
- ▶ Bookkeeping Options
- ▶ Add Category

## Create Category

Name:

Type:

IRS Category

Cancel

Save