

Surprise and delight

Building customer loyalty
and moments that matter
with thoughtful action.

One of the most effective ways to nurture client relationships and enhance customer loyalty is implementing a “Surprise & Delight” process. This is a way to show your clients that you’re thinking about them, and that you care about what’s important to them. In fact, studies show that memorable experiences created by a “Surprise and Delight” effort make clients feel more listened to and more appreciated.



Table of contents

3 Best practices

4 Ideas

4 Office Surprise & Delight

5 Life events

6 Client anniversary/birthday/anniversaries

7 Holiday

8 Death of a loved one & Get well

9 Gift Baskets

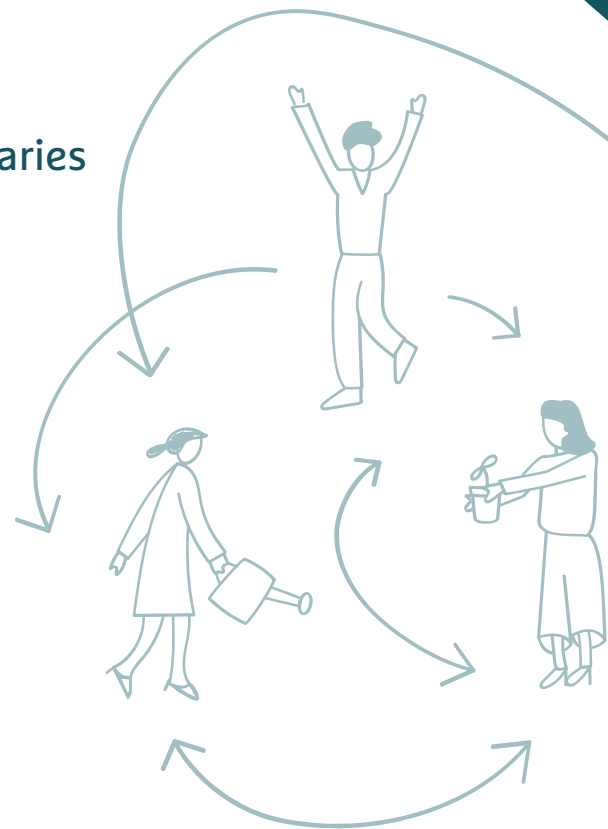
10 Gift Ideas

10 Holiday

10 Unique

11 Food & resources

12 Fair-trade, sustainable, and socially responsible



Best practices

Check them off as you plan

- ☐ **Make it personal!**
The more unique and specific, the more it will mean to your client.
- ☐ **Segment your list**
Identify top clients that you want to focus on with more personal opportunities. Identify hobbies, upcoming events and life stages.
- ☐ **Look for opportunities**
Look for opportunities to automate “Surprise and Delight” clients in lower service level client segments. Doing so will create a positive experience for clients while managing your time.
- ☐ **Determine a strategy**
Determine a strategy for common life events such as weddings, births, deaths, anniversaries and illness. This way, when those life events arise, it’s easy to implement while still being very personal.
- ☐ **Look ahead**
Look ahead for any notable client life events coming up and plan accordingly.
- ☐ **Review meeting notes**
Review meeting notes and ask more in-depth questions.
- ☐ **Shop local**
Shop local for unique and tailored gifts while also supporting small businesses.
- ☐ **Vet your vendors**
We’ve provided some vendor options but do your research to be sure they align with your practice.

This guide is not an endorsement of any vendor. Vendor options are provided as food for thought only.

Remember to stay compliant!

Keep gift costs at or below \$100 per client per year. Track and log appropriately.

Keep copies of any written notes in your correspondence records file.



Ideas

Office Surprise & Delight

Here are examples of different opportunities to “Surprise and Delight” clients. Consider including this process in both day-to-day activities and when the opportunity presents itself. To maximize impact, implement and follow a standard to select gifts tailored to the individual client.



Make your client feel like a VIP when they visit your office by reserving a special parking spot with their name on it. Purchase nice-looking signage that can be changed for each appointment.



Take note of your client’s favorite beverage and have it ready. Serve clients refreshments in nice glasses, cups, or even fine china.



Send handwritten notes on premium quality paper. Few people do this anymore, but it’s great for new clients or following appointments!



Before a meeting, refresh yourself on your client’s family members’ names and recent events in their life. Acknowledge any significant events or updates since your last conversation or review; be sure to use their names.



Make a personal phone call to check in on any notable events in a client’s life. Take meticulous notes for future “Surprise and Delight” opportunities.



Celebrate birthdays. You can send out handwritten cards, customized greeting cards, or even an email.



Host client events, even virtually. Events are an opportunity to get face time with clients in a less formal setting than your regular review. It’s also an opportunity for clients to bring potential referrals.



Ideas

Life events



Send college apparel or memorabilia to clients when their child or grandchild gets accepted to or graduates from college.



Send travel books, maps, or food guides to clients who are getting ready to take a dream trip.



For top clients, organize their retirement party by coordinating the location, food, and drinks. This is a fantastic way to meet their friends and family and position yourself to retain assets over time and across generations.



For retiring clients, create a gift basket full of fun items based on what they are looking forward to doing in retirement. Traveling, gardening, golfing, a new hobby – the sky is the limit!



Send an engraved picture frame, piggy bank, or customized blanket to clients welcoming a new baby into the family.



Send a thoughtful gift, like flowers, to the bride-to-be or groom-to-be at their workplace before the wedding



Send meals to clients going through a difficult life situation. Divorce, a single parent homeschooling their children, health ailment, or the passing of a loved one are all opportunities to help out with a meal or two



Anytime there is a notable event in someone's life, mail a card with a customized message.



Celebrate the addition of a new four-legged family member by creating a customized gift for the pet owner such as a pet tag, key chain with an image, or fun pet treats.



Books! This a great way to acknowledge a person's hobbies, passions, or current goals. Put a handwritten note inside the front cover. Cookbooks, travel, and hobby books are great options!



For clients buying a first home or making a big move, send along a housewarming gift. Lovely candles, a custom mailing stamp, fancy hand soaps or a custom cutting board make great gifts.



Purchase a gift card for live local entertainment like sports, art, or theater (be sure to stay under the \$100 cumulative limit!). Most gift cards can be used to purchase tickets, concessions, or merchandise at the venue.

Ideas

Client anniversary/birthday/anniversaries



Take the client (plus spouse) to a nice meal. Only discuss personal matters, no business!



Send a nice bottle of champagne/wine for notable anniversaries like their wedding. Be sure your client is within the state; USPS will not ship alcohol across state lines under any circumstances. UPS and FedEx take a different stance, though neither makes it simple. Instead, consider using a service like Uber Eats and put in the receiver's address directly for delivery.



Remember, not all "Surprise and Delight" efforts have to be expensive. Even a small gift with a handwritten note can be meaningful, if it's the right gift at the right time.



Deliver a small treat with a handwritten note expressing thanks for new clients coming up on their first client anniversary.



For significant wedding anniversaries, follow the anniversary themes and send a thoughtful gift to celebrate their time together. Get creative to stay under the \$100 annual cumulative limit!



Ideas

Holiday



Partner with a local bakery to hand-deliver or have clients pick up holiday pies or treats before Thanksgiving or during the winter holidays.



Send a fresh wreath or garland for the holidays to bring a new spin on flowers and increase the merriment with great fragrance!



Hand-deliver a bottle of champagne, fun hats, and festive flutes for New Year's celebrations.



Culinarily inclined? Whip up some goodies in disposable dishes that clients can bake during their festivities, such as dinner rolls, cinnamon rolls, pies, or bread.



Provide families with all the trimmings to assemble gingerbread houses. Include some fun candies and a meaningful note as well!



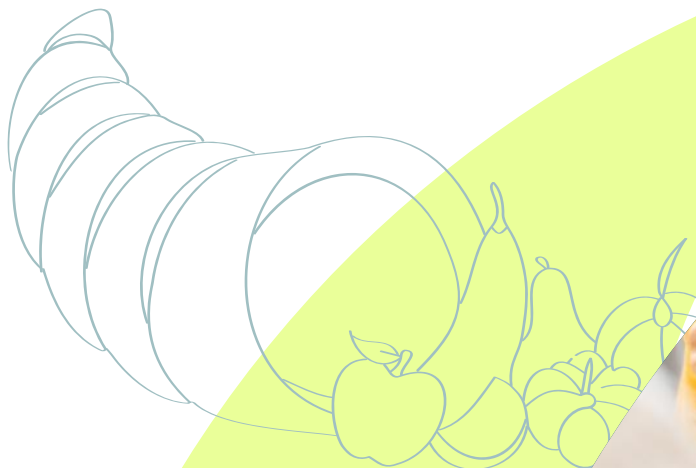
Send clients an ornament that captures the spirit of the year or an interest they may have.



Send clients who are newly married or new parents a commemorative ornament.



Donate to a cause in honor of clients. Pick an organization that resonates with the current climate or one of importance to you. Send along a card or postcard to clients with a heartfelt message and information on the organization. There are also donation options that allow clients to pick their charity!



Ideas

Death of a loved one & Get well



Plant a tree for a deceased client or on behalf of a client's loved one. Companies like www.alivingtribute.org will take care of everything for you!



Donate to a cause or organization on behalf of your client or a client's loved one. Most charities will send an acknowledgment to the family.



Deliver flowers or a potted plant to the funeral home or client's home.



Send pre-printed cards and stamps to make following up with well-wishers easier for clients. Include a potted plant (lilies are traditional) and a small gift.



Send something other than flowers to the family; options include a windchime, photo frame, or even a plant that can be planted in remembrance.



Check obituaries for "in lieu of" requests and follow the wishes of the family.



Send flowers to widowed clients on Valentine's Day. Valentine's Day events are also a great way to support widows with an activity and introduce them to a support network.



In the event of losing a spouse, look for opportunities to lift the burden on home management. This could include house cleaning, yard upkeep, childcare, snow removal, or food delivery.



Check in later in the year after a loved one's passing by making a phone call, sending a card, or finding ways to support. Many times, support is available directly following the death but tapers off.



Depending on the loss, call, send a card or deliver flowers on the deceased's birthday or anniversary of their death. Make sure this is appropriate for the client and their wishes.



Send a meal to those not feeling well or recovering from a health ailment. You can hand deliver from a favorite restaurant, order through a delivery service such as Uber Eats or DoorDash, or even send along a virtual gift card. Extra points for a home-cooked meal!



Send a handwritten card along with a Giggling Happy Pill fun plush toy to bring a smile to someone sick. Search for "Giggling Happy Pill" online for different purchase options. Sounds cheesy, but we promise they will love it.



Arrange for a cleaning or yard service to visit the client's home to help manage the upkeep.

Ideas

Gift baskets

Birthday or Anniversary: A flower bouquet, gift certificate to client's favorite shop or restaurant, a bottle of champagne with custom champagne stems made by a local artisan, festive cake made by your local bakery.

Book Lover: Book light, bookmark, mug, cozy blanket, bookstore gift certificate, or a book.

Coffee Lovers: Local coffees or teas, syrups or flavored stir sticks/spoons, mugs or insulated tumbler, biscotti, or tea cookies.

College Acceptance: College apparel and décor, instant coffee, notebooks, daily planner, restaurant gift cards to local eateries.

Congratulations: Engraved wine/whiskey decanter with matching glasses, customized tumbler, cheeseboard with cheeses and gourmet chocolates, tickets, or gift certificate to musical/theater production.

Foodie: Cookbook (include a custom message on the inside), dish towels with funny sayings or images, mandolin slicer, apple peeler/corer, digital thermometer, grilling utensils, digital food scale, herb keeper, a gift certificate to local produce stand or orchard.

Gardener: Hand tools, gloves, watering can, hose attachment/nozzle, kneeling pad, flower books, a gift certificate to a local nursery, wind chimes, bird feeder or birdhouse, garden gnome, a customized steppingstone.

Get Well: Fuzzy blanket, packaged gourmet soup or soup mix, tea, Kleenex.

Golfer: A set of golf balls and tees, a gift certificate for a round of golf, golf towel, ball marker, subscription to a golfing magazine.

Holiday: Party favors and a bottle of champagne, chocolates, fun/funny socks, cheese board with gourmet cheeses, cookies, treats, holiday craft.

Nature Enthusiast: Hiking socks, appropriate book, bug spray, sunscreen, headlamp, foldable water bottle.

Overwhelmed: Great for front-line workers, educators, or single parents. Include a cozy blanket, coffees or teas, pastries from a local bakery, scented candle, bath salts, gift certificate to a local spa or local massage therapist.

Parent/Grandparent: Calendar/book for new parents to record baby's first-year milestones, digital picture frame, height tracking chart, a monogrammed piggy bank with child's initials, custom blanket with photos of child/children.

Sports Fan: Stadium blanket, folding chair, rolling cooler, foam finger, team sweatshirt, koozies.

Travel Enthusiast: Mini clothes steamer, custom luggage tags, travel books, map light, appliance converter set, journaling notebook, custom passport/document holder.

Wine Lover: A bottle of wine, electric bottle opener, bottle stopper, fun or colorful glass charms, cheese board with a cutter, nice stemware.



Gift Ideas

Holiday

Custom Ornament ornamentshop.com

Round out the year with a custom ornament that can be tailored either to the year or your client. There are lots of great options you can choose from, and many can be fully customized with the client's names.

Daily Planner shop.leadersinheels.com & commit30.com

For your female clients who are movers and shakers, send them a planner to organize and set goals for the next year. Both companies focus on purposeful planners for women that keep your client organized.

Donation to a Charity tisbest.org

People are always looking for ways to support others during the holidays. Using TisBest, you can send clients a branded card worth a \$100 contribution that they can donate toward the charity of their choice. This is an excellent "Surprise and Delight" that allows them to choose a charity or cause that's near and dear to them.

Fred "Already Been Chewed" Gingerbread Cookie Cutters cheapcookiecutters.com

What could be more whimsical for a holiday than baking up some cookies with family? These unique gingerbread man cookie cutters look like they already have a bite taken out of them and are sure to bring a grin to all who eat! Pair the cutters with some old-fashioned gingerbread cookie mix for a memorable and unique gift. There are plenty of other cookie cutters to choose from on this site!

Fresh Wreaths and Flowers jacksonandperkins.com

Send clients a fresh wreath or garland strand that they can hang on their door or lay along with their table setting. They smell fantastic and will make a big impression!

Gingerbread House or Kit gingerbreadfactory.com

A fun way to bring some joy to the whole family and make it easy for them. You can either send a fully constructed house or all the pieces to put one together. Include some fun candy with the package, so there are lots of decorating options. If you provide to all your clients, include a decoration contest and post the pics on social media!

Kosher Treats zabars.com & www.goldbelly.com

For clients celebrating Hanukkah, send along some kosher eats to help them celebrate the time. Zabar's has many options to choose from and also tons of options heralding from New York City. Goldbelly has lots of great options for kosher foods, including latkes, desserts, and sauces.

Unique

College or Pro Sportswear fanatics.com

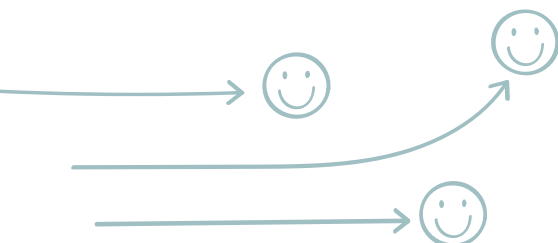
The go-to place to find college or pro team sportswear. Send along a couple of college tees or sweatshirts for clients whose child was just accepted or recently graduated!

Custom Puzzle puzzleyou.com

Create a custom puzzle based on an image. You can create these from photos from special events, family photos, or a favorite travel photo.

Customizable Engraved Photo Album thingsremembered.com

This customizable engraved photo album can be a wonderful touch to a milestone event in your client's life. You can send this gift during many special occasions, including the birth of a new child/grandchild, new marriage of a client, child or grandchild, retirement, or family member passing. Make sure to engrave the message appropriately for the occasion.



Engraved Piggy Bank for Newborn Child
lenox.com & thingsremembered.com

This customizable engraved gift can be a nice touch for those clients who have recently welcomed a newborn into their family. Send this item to new parents or grandparents and throw a few dollars and quarters in there.

Flower Bulbs

hollandbulbfarms.com & americanmeadows.com

For a different take on a flower arrangement, send either an indoor potted bulb garden that will continue to bloom for the season (some bulbs can be replanted outside for the next year) or bulbs that gardening lovers can plant themselves. Be sure to look at your client's location to order the types of flowers that will grow!

Gourmet Bath & Body

soaptopia.com

Handmade, one-of-a-kind soaps, scrubs, balms, natural perfumes, and much more in gourmet "flavors" and attractive packaging! Unique gift sets or gift certificates make it easy to shop!

Kitchenware and Recipes

beehivehandmade.com

A unique and personal way to "give a piece of yourself" to clients is through the sharing of a cherished family recipe. Print your recipe on card stock and include with it a note about the recipe's "history" and what this special recipe means to you. Pair it with one-of-a-kind handmade kitchenware gifts, many of which can be customized.

Linnea Design Calendars

linneadesign.com

Artistic and unique, these calendars are different from the ordinary.

Personalized Stamp and Cards

shutterfly.com (search for self-inking rubber stamp)

Self-inking, beautifully decorated stationery stamps customized for each recipient. Pair the stamp with a lovely notecard set for added impact.

Food and resources

Christopher Elbow Chocolates

elbowchocolates.com

Beautifully made chocolates and elegant packaging are one thing, but the interesting flavors of these chocolates are what makes them a unique gift idea. From Lavender or Rosemary Caramel to Yuzu fruit and Cabernet, these artisanal chocolates are sure to get people talking!

Custom Shortbread Cookies

uncommongoods.com

You can customize these cookies with a personal message to celebrate an important event. You can also submit a special message in the packaging and get creative with the delivery!

Enstrom's Almond Toffee

enstrom.com

Incredibly delicious toffee in lovely tins or themed gift boxes.

Fairytale Brownies

brownies.com

Their delicious assortments include awesome flavors and come hand packed in a gift box. Certified kosher.

French Chocolates

zchocolat.com

These chocolates are straight from France! The chocolates themselves are amazing, and they provide packaging in lovely wooden boxes that can be personalized with engraved plates or other customization options.

Goldbelly

goldbelly.com

A curated marketplace for Gourmet Food & Food Gifts. They feature America's most legendary and iconic foods and gifts that you can order directly to your client. This is a great way to send something nostalgic or from their hometown.

iGourmet

igourmet.com

iGourmet offers an interesting selection of specialty food products and gift baskets, including fun packages to choose from that you can tailor to an event or favorite kind of food! Check out the "Artisan American Bacon Gift Crate."

Milk Bar

milkbarstore.com

This is a great way to help celebrate birthdays with fun and interesting cakes. The cakes are carefully packaged with insulation and ice packs, so they arrive fresh and in one piece.

Pecan Pie

priesters.com

Whether regular or chocolate pecan pie, this traditional southern dessert is sure to satisfy the sweet tooth of both young and old. This company also ships fresh nuts (specialty tins available) and chocolates.

Zingerman's
zingermans.com

From gourmet chocolates and brownies to olive oils and cheeses and everything in between, Zingerman's is a one-stop-shop for a wide variety of unique and/or hard-to-find edibles.

**Fair-trade, sustainable,
and socially responsible**

Botanical Paper Works
botanicalpaperworks.com

This company sells eco-friendly seed paper products that grow into wildflowers, herbs, or vegetables. Their mission is to help spread beauty and reduce waste by sharing biodegradable seed paper made from post-consumer material. You can order cards, stationery, notebooks, along with many other items that clients could then plant.

Give a Damn Goods
giveadamngoods.com

This company has many types of gifts to choose from, many of them witty or wry. Their partner brands positively impact communities around the world through job creation, fair wages, and by focusing on social responsibility.

Mayan Hands
mayanhands.org

Mayan Hands is a fair-trade nonprofit organization dedicated to providing economic and educational opportunities to Mayan women and girls so they can build sustainable futures for themselves, their families, and communities. Gifts include handwoven baskets, felted wool animals, scarves, table linens, and more.

Packed with Purpose
packedwithpurpose.gifts

Their mission is to create meaningful social impact while strengthening human connections. Every gift includes the inspiring story about the Purposeful Purveyor ordered from and how they make a meaningful social impact.

Plant a Tree and More
arborday.org

Planting a tree in someone's honor is a lifelong tribute. Arbor Day also provides other green-impact gifts from fair trade gift coffees to gift memberships, apparel, puzzles, and more; the purchase of these items supports the Foundation's work to replenish our national forests, save rain forest land, and more.

Soup Mixes that Make a Difference
womensbeanproject.com

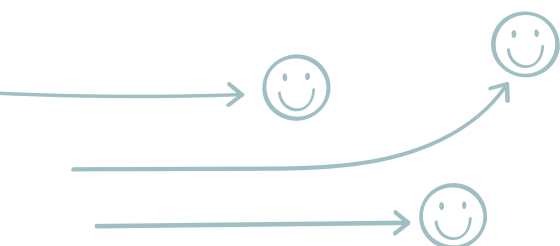
This organization supports disadvantaged women, their families, and their communities by helping them attain the skills to join the workforce and build a better life. Soup mixes are a great gift for someone battling illness or simply as a mid-winter pick-me-up.

Supporting Global Craftsmen & Craftswomen
giftswithhumanity.com

With a mission to provide income-generating opportunities to craftspeople in developing countries, Gifts with Humanity curates socially responsible products from around the world. Gifts with Humanity has been a member of the Fair-Trade Federation for more than 10 years.

Uncommon Goods
uncommongoods.com

Uncommon Goods has an awesome collection of unique, customizable gifts for any occasion. They offer designs by independent makers and do it with a focus on a positive impact on both people and the planet. Check your Perks at Work through Osaic for discount offers here!



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