

The Ultimate Buyer's Guide for Sending Platforms

Everything you need to know about purchasing the best Sending Platform for your marketing, sales, and customer experience teams.



Sendoso



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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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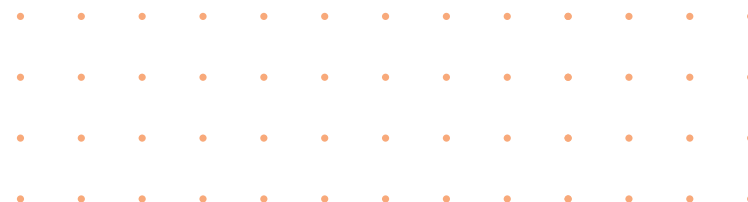
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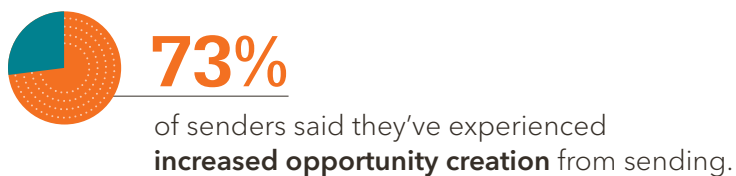
About Sendoso



In 2020, our go-to-market playbooks have changed.

It's time to reinvent how you're driving revenue—especially when budgets are constrained, channels are limited, and in-person engagement is not always an option.

In a socially distant world, people crave connection with others in a very real, meaningful way. That's why tactics like events and face-to-face meetings were so effective. But when traveling to see every single prospect, customer, or employee in person isn't always feasible or allowed, companies can still create personal relationships with their customers and prospects. Sending direct mail, gifts, and swag have always been powerful ways to engage people, and research from our [2020 State of Sending](#) shows that:



Over the last few years, we've seen a sustained increase in the overall amount of items being sent. The amount that companies are sending on a monthly basis increased [36%](#) from 2018 to 2019. And business executives expect that it will continue to rise.

But delivering the most revenue and ROI requires marketing, sales, and customer experience (CX) teams to work together to collectively drive a cross-functional account-based strategy. This is only achievable with a shift in mentality across an entire organization. Meaning, key segmentations in an organization's marketing audience must be reflected in segmentation for sales development, sales, and customer success.

This shift evolves account-based marketing into account-based everything (ABX); the most efficient go-to-market strategy today. Sending Platforms are always ranked at the very top of the Account-Based Execution category on software review sites like G2, and sending has proven to be effective throughout the entire customer lifecycle:

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, consider sending them a handwritten note introducing your brand, and follow-up with an email to book a demo. The personal touch of a handwritten note will make it more likely for them to respond to your emails or answer your calls afterwards.

Mid-funnel: After your targeted accounts are aware of your brand, it's likely they're evaluating if your product is the right fit for 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). You can even use it to reward a prospect or customer's engagement with your company. For instance, after a prospect or customer attends a webinar, send an eGift for coffee with a quick note saying 'thank you.'

Bottom-of-funnel: By the time prospects reach the bottom of the funnel, they know about you, and they've taken the time to understand your company. To get your prospects across the finish line, send them personalized direct mail and gifts. Once they turn into customers, you can send them gifts prior to renewal or at key stages of the customer lifecycle to increase product adoption and turn them into advocates.

Practices like sending direct mail, corporate gifts, or branded swag have been around for ages, but in order for your go-to-market strategy to be successful, you have to go beyond delivering a personal gift. Sending Platforms make this possible. This guide explains what Sending Platforms are, how they work, why you need one, and, most importantly, how to evaluate and buy one so you can start making new meaningful connections, one send at a time.

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 more can deliver Physical Impressions™ at strategic points throughout the customer lifecycle and measure the ROI for anything that was sent. The power behind a Sending Platform comes from the fully automated fulfillment and logistics service that assures quality, on-time delivery.

In the past, organizations have relied on different pieces of software to automate varying parts of the sending process such as:

Direct mail automation: Direct mail automation (sometimes referred to as tactile marketing) allows sending for small and large groups of audiences and is used by marketers to engage prospects and customers offline by sending printed mailers, marketing materials, or other physical items. This is often used by marketing teams for one-to-many campaigns, and leveraged to connect with prospects and clients in a meaningful way. But by relying on one-to-many direct mail sends alone, you can't create that individual 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 redeemed for a cup of coffee.



Corporate gifting software: Corporate gifting tools (or personal experience platforms) help you send on a one-to-one basis and is the practice of creating a touchpoint with clients, or prospects by sending a gift—whether giving a physical item such as a practical swag piece, an edible treat, or personalized clothing item; or via a digital experience (like eGifts, airfare or concert tickets). These gifts may be meant to drive response (as with a prospecting gift), reward behaviors (like a gift for making a purchase), referring a friend, or completing a download when researching a product or service, and are routinely used by sales, SDR, and customer teams to quickly develop customer relationships. However, using a corporate gifting tool by itself provides little opportunity for any timely follow-up.

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 anything branded that you need to send. But 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.

As a result, 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 ties together direct mail, corporate gifting, swag management, and personalization **plus** handles the moving parts of sourcing shipping, tracking, and measuring ROI—all with the click of a button.

What Can Sending Platforms Do?

Sending Platforms should have all of the following capabilities.



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 on 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.



Seamless Integrations

Sending Platforms aren't a cumbersome piece of software that simply adds to the many tools already in your tech stack. A successful Sending Platform integrates with software you're already using and working with, from marketing automation and sales acceleration to HR software and CRM.



Worldwide Fulfillment & Inventory Management

A true Sending Platform has warehouses across the globe with international fulfillment capabilities and the ability to send multiple currencies. It should provide a real-time view of inventory so that you can reach your recipients no matter where they're working (and have the option to confirm their best address).



Intelligent Analytics & Reporting

Most importantly, a Sending Platform should always track and measure the effectiveness of your efforts. A good Sending Platform delivers high-level, visual summaries of exactly where your sends are each step of the process; 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.



Scalability Across Teams & Budgets

Quality Sending Platforms have the ability to scale across multiple teams and departments. You should be able to control the amount of dollars spent by creating teams and assigning unique budgets for each department. The platform should also provide monthly sending allowances that expire or ones that roll over at the end of the month, or set one-time budgets and refill them whenever needed.

Who is a Sending Platform for?

Sending Platforms should 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, as well as the ability to add, edit, or remove sending options with ease—keeping each team’s sending campaigns fresh and relevant.

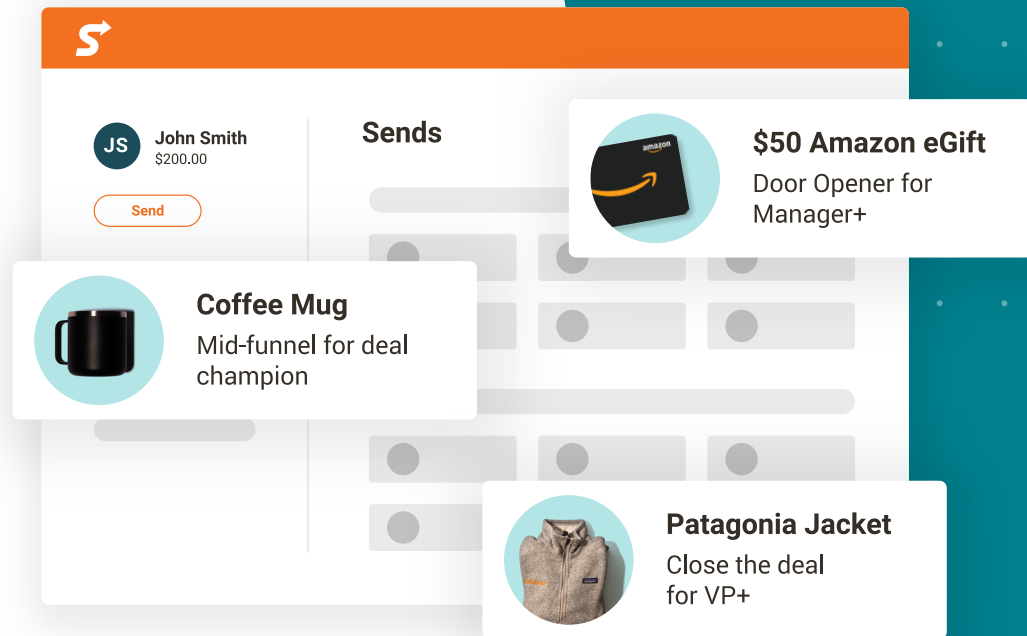
For example, the chart below shows how different teams are able to use Sendoso, and significant results for each use case.

TITLE	CHALLENGES	SOLUTION / USE CASES	RESULTS
SALES	Finding new ways to capture attention and accelerate the sales cycle.	<ul style="list-style-type: none">• Reduce time to closed won / increase pipeline activity• Increase 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.	<ul style="list-style-type: none">• Increase meeting show rates• Increase response rates• Increase conversion from cold lead	Chili Piper saw a 33% increase in meeting show rates with Sendoso eGifts.
ACCOUNT-BASED MARKETING (ABM)	Identifying and engaging target accounts with personalized experiences.	<ul style="list-style-type: none">• Break into target accounts• Increase lead-to-opp conversion• Reduce cost of customer acquisition	Uberflip added Sendoso to their ABM approach. As a result, they generated more than 30X ROI and 450% return on closed revenue.
FIELD MARKETING / EVENTS	Drive event attendance and generate leads from events (online and in-person).	<ul style="list-style-type: none">• Increase attendance rates / lead capture• Increase response rates to follow-up nurture programs• Drive revenue from event leads	LiveRamp added Sendoso to their event invitations and increased registrations by more than 30%.
CX	Improve customer retention by personalizing customer journey.	<ul style="list-style-type: none">• Increase customer engagement• Increase retention rate• Increase meeting show rates	LiveRamp saw a high correlation between renewals and a Sendoso touchpoint.

Choosing the Right Sending Platform for You

Sending Platforms are extremely effective for a variety of reasons, but purchasing the wrong product for you and your team could be a very costly mistake. No two companies will have the exact same needs when it comes to a Sending Platform, just like each Sending Platform functions a bit differently. You'll want to take your time, and evaluate the capabilities and cost of all your options to make sure you're choosing the perfect platform for you.

Here's a quick guide for ensuring you get the best Sending Platform for your teams and generate the most revenue, retention, and ROI.



How to Evaluate a Sending Platform

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

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

What questions should I ask when making a decision?

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 HR and marketing teams use the Sending Platform warehouse for swag management?
- How does the platform generate ROI?
 - Are there case studies and success metrics from customers relevant to your use case?
- How much funding has the platform received (i.e. have they demonstrated stability)?



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.

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 customize 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 ends?
- Does the platform include international eGifts (including for Canada and the UK)?
- 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

- Can the vendor share information about their 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 for 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?



Pry Before You Buy!

Warning Signs of a Bad Sending Platform

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

The vendor doesn't have use cases or ROI metrics across the customer lifecycle.

Any Sending Platform can proclaim 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 use-case examples across the **entire** customer lifecycle to ensure you're buying a worthwhile product. 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.

Few or no integrations.

Nobody needs one more standalone tool to learn and then train your team how to use. A Sending Platform should enable your team to create, click, and connect from wherever you already work, whether that's getting your sales, SDR, and CX teams to execute one-to-one sends from Salesforce and Outreach, or your marketing teams to automate sends to larger audiences from Marketo. If your Sending Platform can't integrate, it will be much harder to implement.



The solution isn't scalable.

Getting a sending strategy off the ground takes coordination from multiple teams. Solutions that can only be used one time in the customer lifecycle by one team will get old quickly, plus, you'll quickly run out of new pipeline. Ask for details on how the solution you're evaluating can grow with your team.

Limited sending possibilities.

There are only so many alma mater mugs 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.

Makes you pay for sends you think you'll use up front **or** tells you that you can save money by only paying for gifts accepted.

The best Sending Platforms will never charge you for sends upfront and should always give a recipient the option to accept a gift, and have features like Address Confirmation to verify a recipient's preferred address.

Companies that claim to use AI for personalization.

Be wary of any Sending Platform that says they're using AI to personalize their sending experience. Chances are, they're not. What they're most likely doing is automatically pulling gifting suggestions from the social media accounts of prospects—which isn't a perfect method. Many people don't regularly update their social media accounts so information on them can sometimes be years old - plus, do you really like sharing details of your family / personal life with unsolicited companies? Instead, find a solution that helps you build a genuine connection with prospects no matter where they are in the funnel, and uses the power of personalization responsibly.

No international sending options.

If a Sending Platform is only able to send within the US, not only would you be missing out on a hundreds of thousands of opportunities to engage with customers abroad, but if your company has international offices, your employees in those areas would be missing out as well. Plus, international shipping fees are extremely expensive, so you'll want a platform with a global footprint and local vendors around the world.

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 perfect pick is out of stock! Now you'll have to start all over again. Don't let that be you! Make sure your Sending Platform allows you to check all your 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 so you know exactly what your sending options are every time.

No way to pre-approve sends.

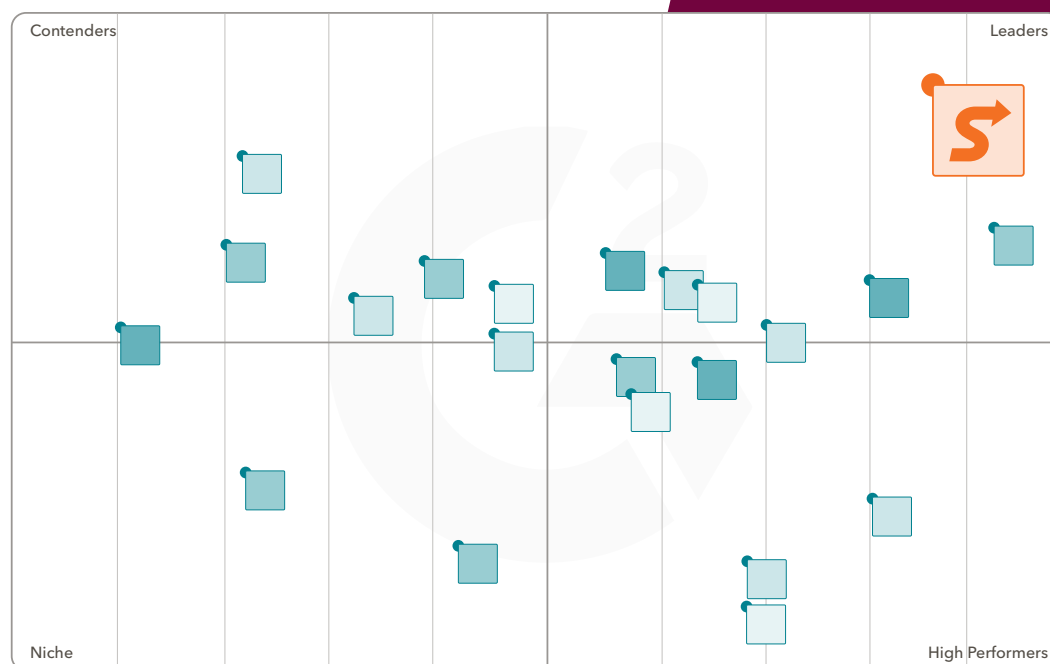
Managers at your company should be able to maintain control of dollars spent and have the ability to create teams and assign unique send options for each department. Your Sending Platform should give you the flexibility of setting monthly sending allowances that expire or ones that roll over at the end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

Consider Customer Reviews

At the end of the day, it all comes down to customer feedback. An excellent way to assess the validity of any software is to check the customer reviews on popular software review sites like G2 and see how the best products rank against each other.

For example, this chart from G2 lists Sendoso as a leader amongst competitors in Account-Based Execution, and we've been named a leader in the categories of Account-Based Direct Mail Software, Direct Mail Automation Software, and 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 Testimonials

Customer testimonials should be an integral and important part of any purchasing decision for software, as it allows you to learn more about the user experience before you've had a chance to purchase the product.

Take a look at the below Sendoso customer reviews for example:

"Understand the differences among PFL, Sendoso, and Alyce. Only Sendoso combines **a technology solution with the control of creating your own touches, help sourcing custom items, and a buy-from-Amazon option.** Other players lack some of these pieces."



Erica Templeton

Digital Marketing Manager and
Marketo Certified Expert



"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



Customer Success Stories

Another way to gage whether a software is up to your standards is to check out their case studies: What are their customers saying about them, and most importantly, how are customers measuring the product's ROI?

Any Sending Platform that is worth your investment should easily be able to show you how customers are actively seeing success in a measurable way. Here are some examples of how companies are sending direct mail, eGifts, and branded swag to generate measurable results on our platform, and make sure any platform you purchase can show you similar examples:



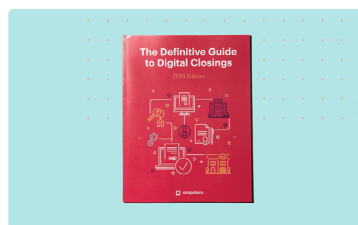
Strategy

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

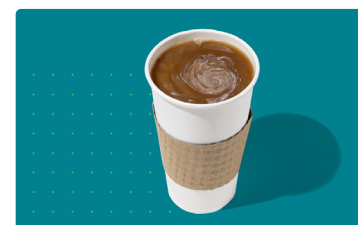


Strategy

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 [here](#) 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 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 it's 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

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In the end, finding the best Sending Platform is about purchasing what aligns the most with your needs and how you define success (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.

