SwagIQ Playbook for Sales

Your guide to sending mailers from Org62

How to ignite customer relationships and drive sales with direct mailers

A gift for you

Welcome to SwagIQ.

Congrats on starting your journey with this powerful tool.
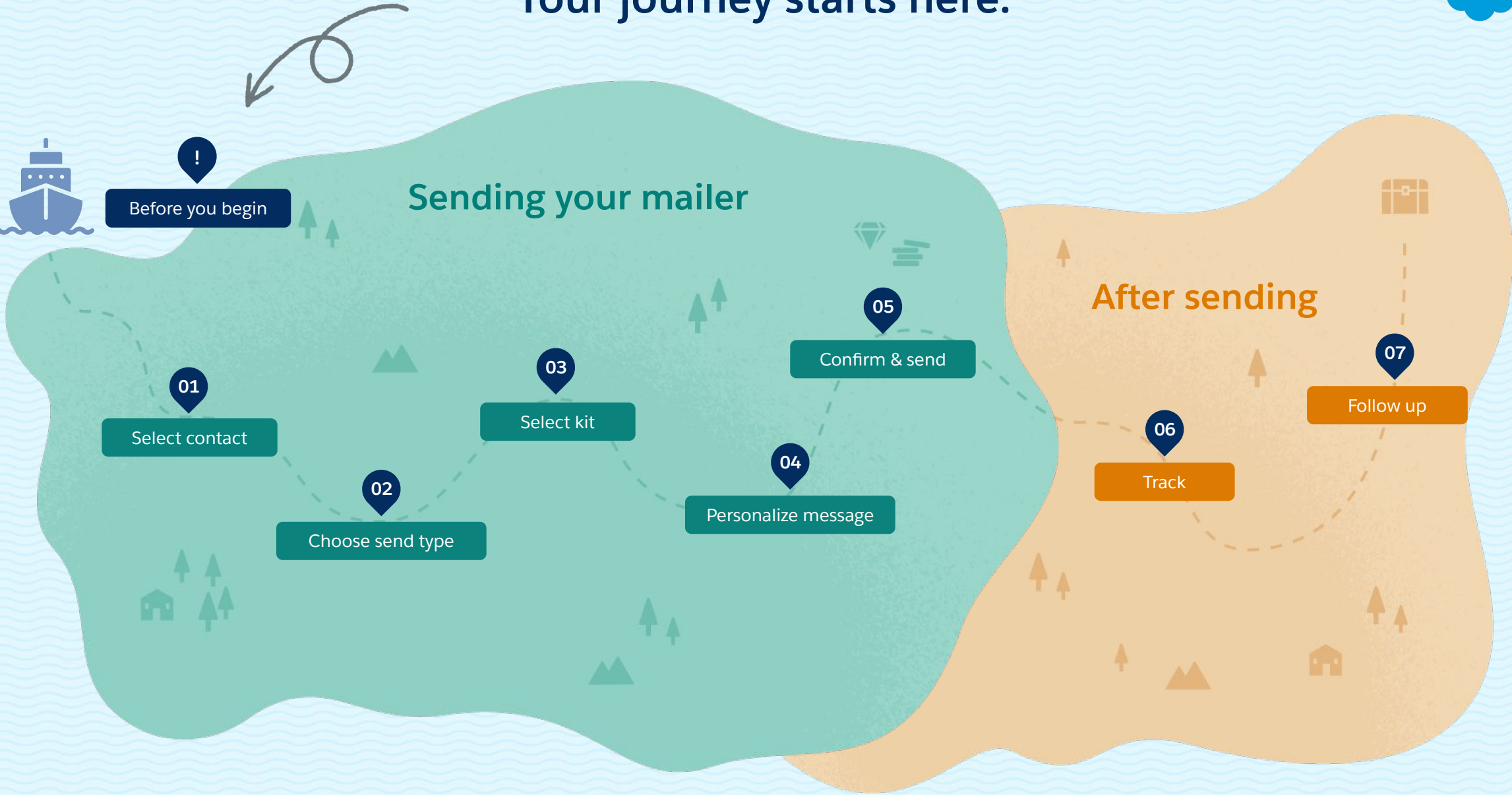Here's an interactive field guide to your next mailer success.
Every section is just a click away.

Journey map

Key takeaways

What is SwagIQ?

SwagIQ is an automated tool inside Org62 to help you build relationships, accelerate sales cycles, and drive ACV. Whether you're looking to start a conversation or keep one flowing, **SwagIQ i**s a proven solution for sending high-impact, personal **1:1 mailers** to your prospects and customers.

It only takes a handful of clicks from your contact record to **choose, personalize, and send** high-impact gifts. Once your mailer is received, you will get a **real-time** notification to begin following up.

Success Stories

$500k+
OPPTY

*"Crazy what a cup of coffee can do huh?"*

*"Newport group is a **new Logo/AOV.** I cold outreached an EVP there and set a coffee chat meeting via SwagIQ.*

Scott Pollack was a good champion / POC for us, thanked us for the gift, gave us all of the information we needed, and connected us with DMs. Specifically most recently the end DM / CTO of the company.

The result is an opportunity for $500K+ that could top a million!

Moral of the story is to connect with AEs as tightly as you can, and keep sending out gifts! Big thank you to SwagIQ and this slack channel. Thank you all~"

Alex Kosinski
ENTR BDR

Success Stories

salesforce

90k
Sales Cloud deal
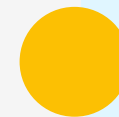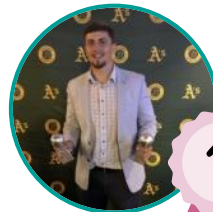
Top Sender Use Case

"I closed a **90K Sales Cloud deal** and **90K Marketing Cloud deal** which all started from swag. I had talked to a couple of people at the company who told me they were looking to evaluate a CRM tool, but I wasn't able to get the correct people on the phone or to return my emails."

Kerry Cummings
MM BDR

2

New Sender Success

"October was my first month sending out Swag IQ and I have loved getting to send it out to my accounts. With a combination of calls and emails I have gotten responses from the majority of contacts that I sent swag to, **multiple meetings** and several **great opportunities**!"

Lindsay Barnes
GRB BDR

3

🤝 **Introductions to Top Accounts**
"I love sending swag over to contacts in my top tier accounts and call them up to make sure they got the package."

💻 **Re-engaging Contacts**
"If I had a top prospect that I know is interested in having a conversation with Salesforce - but might be avoiding my calls - I always send them something in the mail."
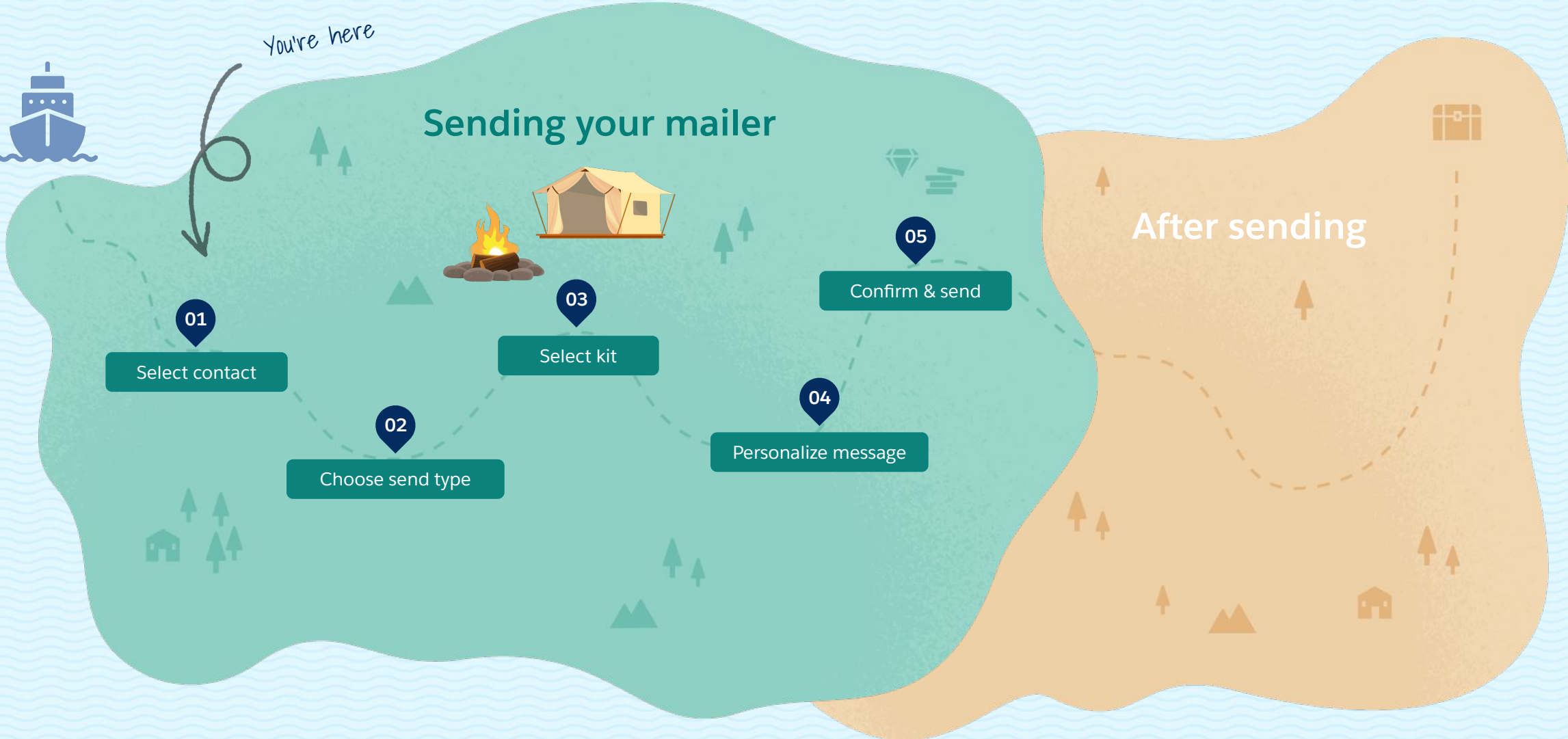
🎁 **Call Downs from my AEs**
"My AEs and I strategize on certain people to send swag to almost every week."

90k
Marketing Cloud deal

Ready to begin?

salesforce

You're here

Sending your mailer

After sending

01
Select contact

02
Choose send type

03
Select kit

04
Personalize message

05
Confirm & send

01. Select contact

SwagIQ is about investing in customer relationships and building trust as a core Salesforce value. Ready to create strategic and authentic connections with SwagIQ? Let's get started!

1. Go to your **contact record**.
2. Verify your contact has not opted out of marketing communications.

   ○ If they have, you must get their verbal consent to opt back in to receive your gift.
   ○ From your contact record, go to the top right corner to find a drop-down menu of advanced options for your contact.

3. From the drop-down list, select "**Send Marketing Materials**".
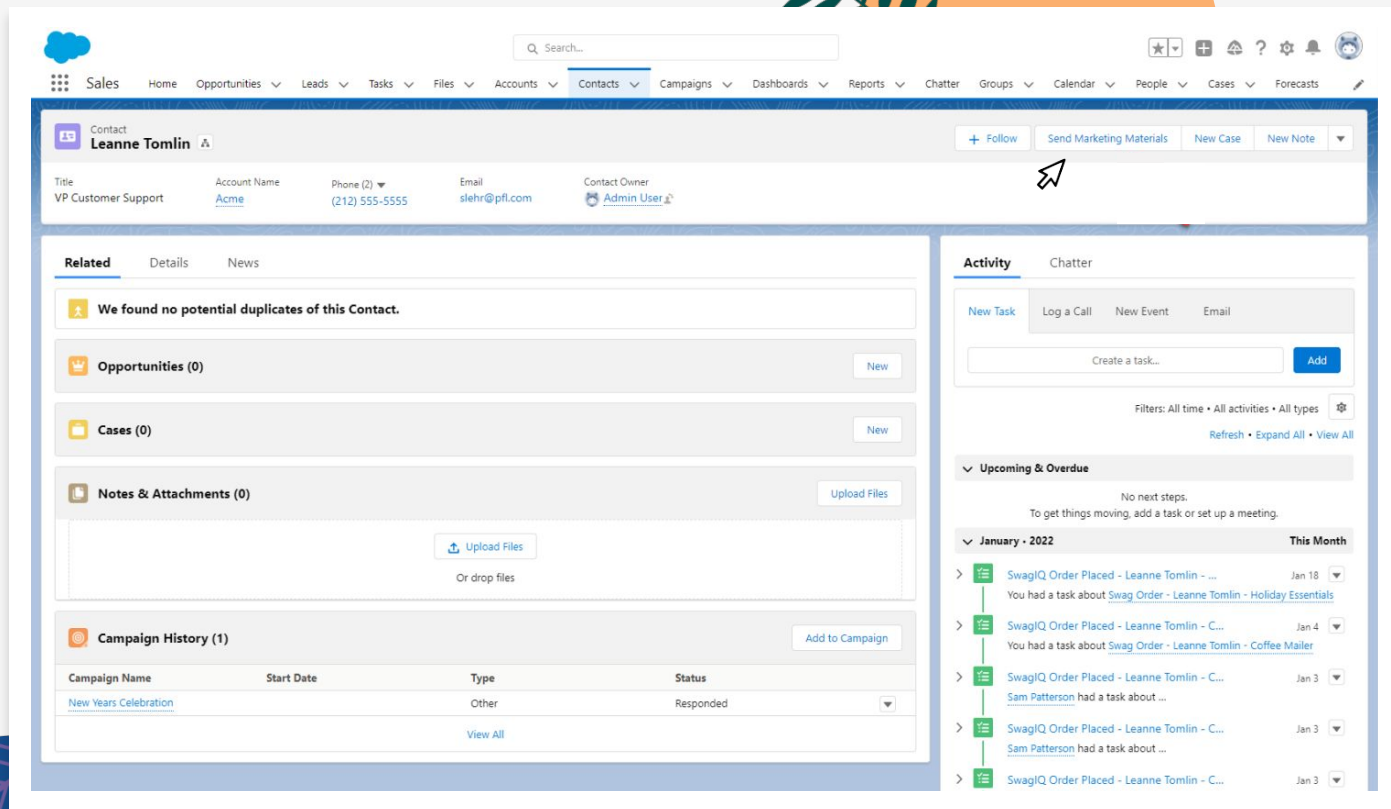
Pro Tip: Before initiating a SwagIQ send, warm up your prospect with 2-3 touches. Use SwagIQ on the second or third touch.

01. Best Practices

Types of contacts to look for:

- **Decision-makers:** Those who call the shots about buying.
- **Influencers:** Folks who can introduce you to the "selection" or "purchasing" committee. Their opinions have influence over the decision-makers.
- **Executives / Leaders:** Director+ and those with senior titles tend to have sway.
- **Champions:** Those at the customer org who love and advocate for Salesforce.

Keep in mind:

👋 **Before** sending SwagIQ, nurture your contact with **2-3 touches** (email, call etc) first. Leverage SwagIQ on your **second** or **third** touch.

📅 **Know your monthly send limits, if any.** It helps to plan out your month, and prioritize the **most important contacts** and/or milestones.

✅ Be sure to verify that your recipient is still with the company and has **opted in for marketing communication** (if not, you **must** get their verbal approval).
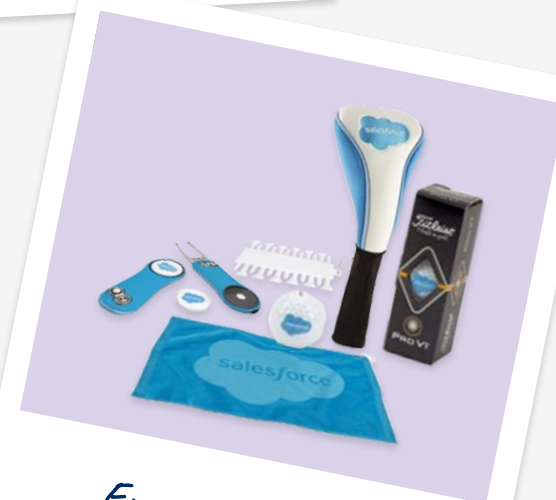
🔐 Always use personal information carefully and respectfully. **Never** store a personal mailing address or share a confirmed address with an outside party.

Coffee mailer

Executive golf kit

01. Best Practices

Use SwagIQ to:

👋 **Make a strong first impression.** Whether you're looking to start a new relationship, break into a new account, meet someone new in the role, send a physical mailer at the beginning of your outreach. It can help you make a warm first impression and set the groundwork for what Salesforce has to offer.

🤝 **Land a meeting.** Use SwagIQ to help you reach out for an introduction, discovery call, or demo. Firm up a scheduled meeting and/or drive excitement and attendance, by sending swag in advance of your call.

🙏 **Say thank you** as a follow-up for attending a meeting and/or event.

🎉 **Celebrate a milestone**, big win, promotion, recognition, anniversary, go-live.

🧠 **Re-engage an elusive contact.** Unstick stalled deals and reignite interest with a thought provoking gift.

💝 **Nurture key account relationships.** Send a SwagIQ mailer to nurture relationships, create goodwill, and build responsiveness.

💡 **Keep the conversation going** with a contact showing engagement and/or **expand influence** within an account.

🎁 **Close the sales cycle.** Send a thoughtful gift that sets your apart, when you're expecting a final decision.
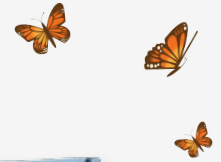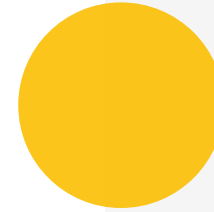
02. Choose send type

Welcome to your SwagIQ Store!
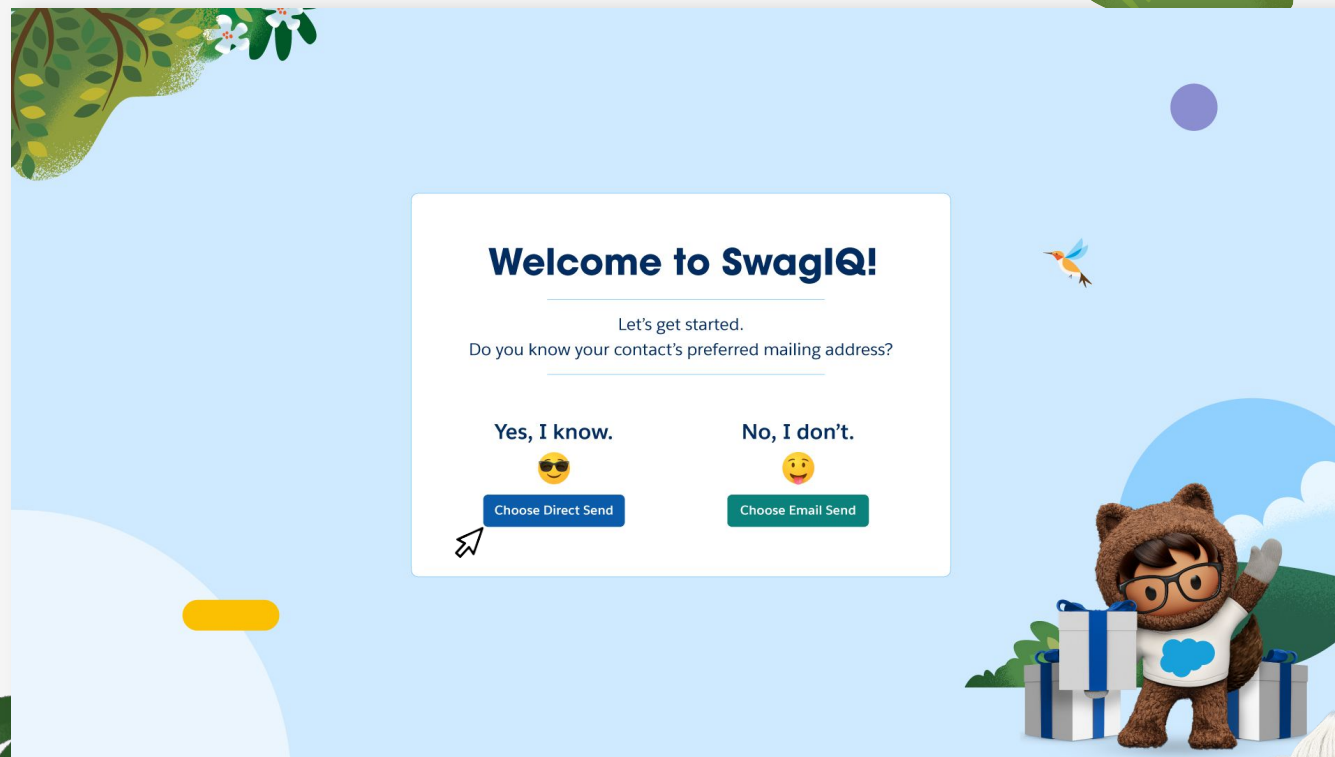
Select your send option:

📬 **Direct: select this i**f you would like to ship the kit to the address on the contact record (ie. typically headquarters) or you have the contact's preferred mailing address.

💻 **Email:** select this when you don't know the contact's preferred mailing address (for SwagIQ to send a redemption email to get your contact's preferred mailing address).

Pro Tip: A "cold" send feels like spam. Warm things up by reaching out to your contact to let them know you're sending them a little something (include the redemption page URL for Email sends).

03. Select kit

1. Browse through your SwagIQ store, to find the right kit.

2. **Featured** items at the top are recommended and regularly updated by your marketing team.

3. Use your **"search"** function to find kits by **name**. You can also **filter** by kit type (featured, favorited, etc) and **sort** by "newest", "recently sent", "most popular" (last 90 days), and "order count" (total orders placed by SwagIQ users), and "price".

4. **Click on a kit** to view a brief mailer description and inventory notifications. To view full mailer details, click "**View Content Guide.**" Save your **favorite** kits, by clicking the "**heart**" icon.

5. Choose the kit you wish to send and click "**Send Mailer**".

03. Select kit

Best practices for selecting the perfect kit:

🧠 Be **thoughtful**, **personal**, and **practical** with your swag.

🎁 Send a gift that **justifies your touchpoint.** For example, a Trailblazer hoodie is the perfect gesture for celebrating the trails your customers blaze *and* for keeping them warm in the colder months.

☕ **Coffee Kits** work well for New Logo accounts, framed as *"looking forward to our meeting, coffee is on us."*

🏀 Aim to align your swag with your recipient's **interests** and/or **goals**. For example, if your contact is a golfer, a golf kit is the perfect thank you for a meeting.

✅ Choose the **right option** for the **right situation**. Use smaller, low-cost direct mail (ie. books, coffee) when you need to test the waters with a colder lead. For prospects farther along in the buying journey, choose bigger packages, with bolder value statements.

Trailblazer kit
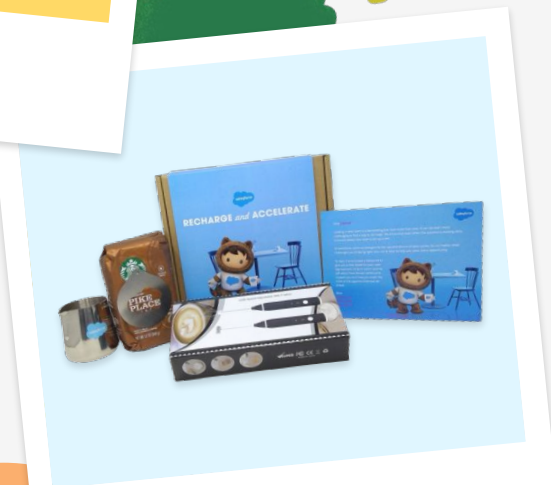
Sales leader barista kit

Pro Tip: Always ask yourself, what do you want your contact to feel when they receive your mailer?

04. Personalize your message

Metrics show that a personalized mailer helps capture attention, land calls, and build relationships. Be thoughtful and authentic in your tone and approach. Connect with your recipient as a partner (not just a vendor).

Every SwagIQkit has its own custom templates. Most messaging already crafted for you by your marketing experts. But there are two great opportunities to personalize your templates:

- Your **email** (linking to the redemption/preferred address page).
- Your **notecard** enclosed with the gift. :
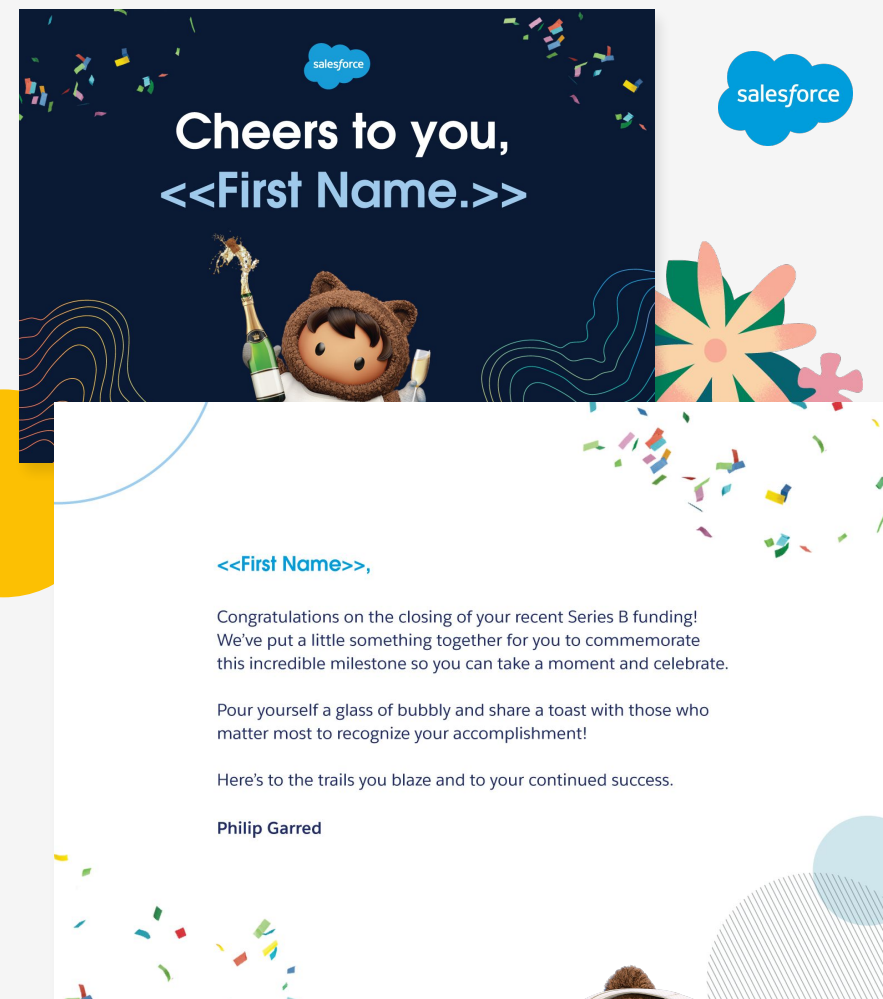
Cheers to you,
<<First Name.>>

salesforce

<<First Name>>,

Congratulations on the closing of your recent Series B funding! We've put a little something together for you to commemorate this incredible milestone so you can take a moment and celebrate.

Pour yourself a glass of bubbly and share a toast with those who matter most to recognize your accomplishment!

Here's to the trails you blaze and to your continued success.

Philip Garred

Pro Tip: Always ask yourself, what do you want your contact to feel when they receive your mailer?

04. Personalize your message

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For Email sends only:

- **Confirm** that your contact has not opted out of marketing communications.

- **Personalize your redemption email.** This is a great way to compel your contact to submit a preferred mailing address and increase redemption rates.

- **Write the way you speak** for an authentic, personal tone.

- **Be strategic**. Instead of asking "if" your contact would like to receive swag, ask for a preferred address. "I'd like to send you a small gift. Do you have a preferred mailing address?"

- **Keep in mind** that **Fridays** and **Mondays** email sends tend to have the highest redemption rates.

Pro Tip: For an Email Send, give your contact a heads' up with a personal email that includes the gift redemption URL. This will also help avoid spam filters.

04. Personalize your message
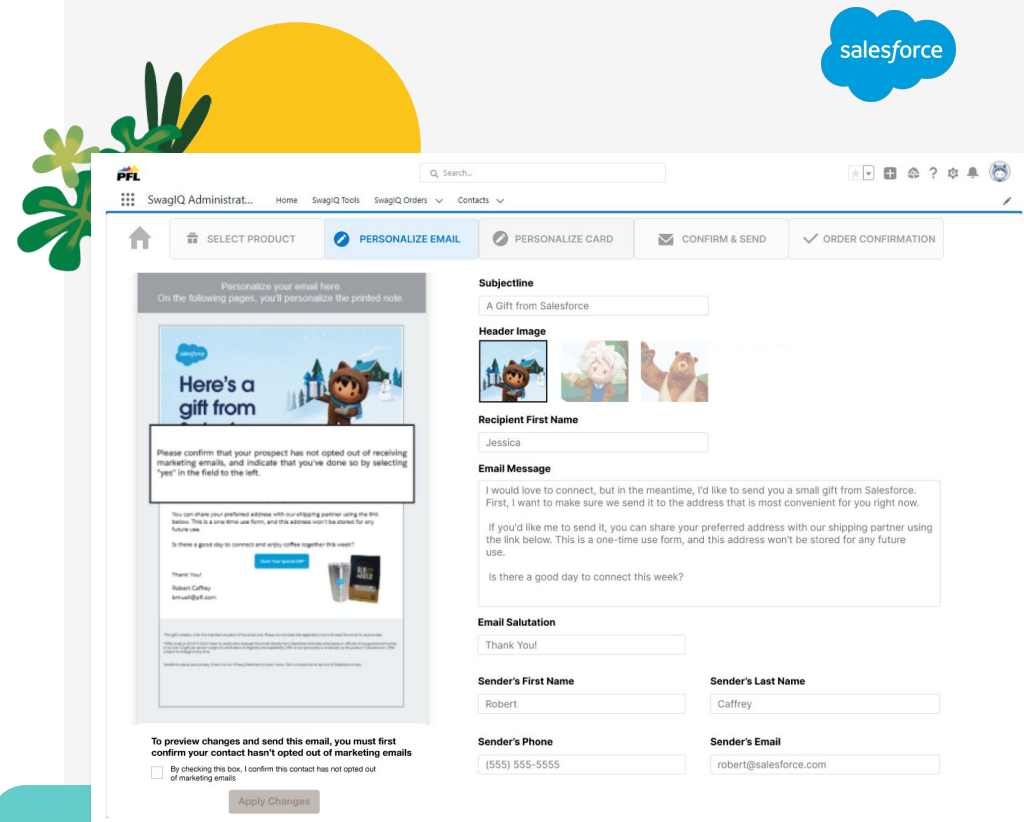
salesforce

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04. Personalize your message

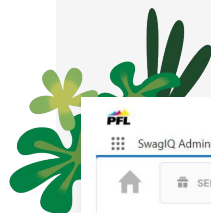**For ALL sends: Customize the notecard enclosed with your gift. This is your golden opportunity to add personal messaging.**

A few personalization best practices to keep in mind:

💗 **Be authentic.** Write like you speak.

📝 **Make it short and sweet.** Establish a connection and make it clear why you are sending this gift. For new logo prospects, keep it short and simple, use the Swag to introduce them to yourself and Salesforce.

👋 **Make it personal.** Greet your contact by first name. Introduce yourself (only if this is the first point of contact). Mention your work with their team. Reference colleague names, news, events specific to their business. Leverage the word "you" (more often than "I" or "we"). Do a little research to see if your recipient has any specific professional and personal interests you can speak to.

📍 **Be intentional.** Ask yourself: Is the message relevant to my contact? Is the **call to action** clear and obvious?

04. Personalize your message

A top-performing notecard example:

Trailblazer Hoodie Kit — A high-converting notecard

Hi <<Firstname>>,

2020 really took us out of our comfort zone. Like the weather in Detroit, marketing can be unpredictable. Here's something to help you warm up to the concept of 1:1 personalization to drive acquisition and retain members!

Can we find 20 minutes to connect?
Will follow up over email!

<<AE>> | Salesforce Marketing Cloud
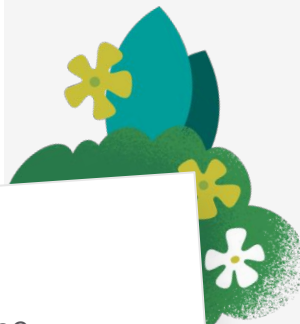
<<Email>>

04. Personalize your message

Use Case Examples:

👋 **Land a meeting or build meeting momentum.** Send a coffee mailer as a door opener opportunity *"Let's grab coffee and chat."* or *"We look forward to seeing you on <<date>>.* ***The coffee is on us****!"*

🔙 **Call out a previous engagement.** Mention your work with the team. Did they look at Salesforce in the past? Have you spoken recently? Remind them that you're not a stranger. *"It's been a while since we last talked…"*

💪 **Strengthen a relationship.** Say thank you. *"Thank you for your time today/ Thank you for attending [Event]. As a special thank you, I'd like to send over a small gift."* Celebrate a milestone. *"I saw you recently joined XYZ. I work on the Salesforce Account team and would like to send you a welcome gift."*

💗 **Show that you understand.** Refer to a specific need your prospect told you about and how you can solve it. *"You mentioned that having customer data in multiple systems makes it difficult for your team to propose solutions. In our meeting on <<date>>, we'll explore how …"*

👤 **Be a thought leader.** Leverage a book with industry-specific content. *"I've been exploring ways Salesforce can help give you visibility into the health of your sales funnel. I hope this book inspires you to…"*

⛱️ **Tie-in an upcoming vacation.** Plan for the direct mail to land when they return and welcome them back. *"I hope you had a great trip and that this coffee kit helps you get back into the swing at work."*

📅 **Tie-in an upcoming event/presentation.** Wish them a good time or good luck and mention the event by name. *"Good luck on your talk at the XYZ conference!"*

🌈 **Capture your prospect's attention.** Leverage a fun and unique kit with a thought-provoking message. *"Thank you for our conversation about increasing your sales funnel visibility to close deals. I'll call you soon to continue the conversation. In the meantime, I hope you enjoy this <<gift>> to…"*

🧠 **Reignite interest.** *"Sorry we missed you at today's meeting. I'd like to send you something to showcase the power of Salesforce while we reschedule."*

04. Personalize your message

Always remember to proofread your personalized emails and notecards. Sending a flawless, typo-free message is critical to making the right impression.

1. **Preview** your messaging on the left-hand side of the email and/or note you are creating.

2. **Verify** all name fields are correct (theirs and yours).

3. If everything looks good, select "**Apply Changes**."
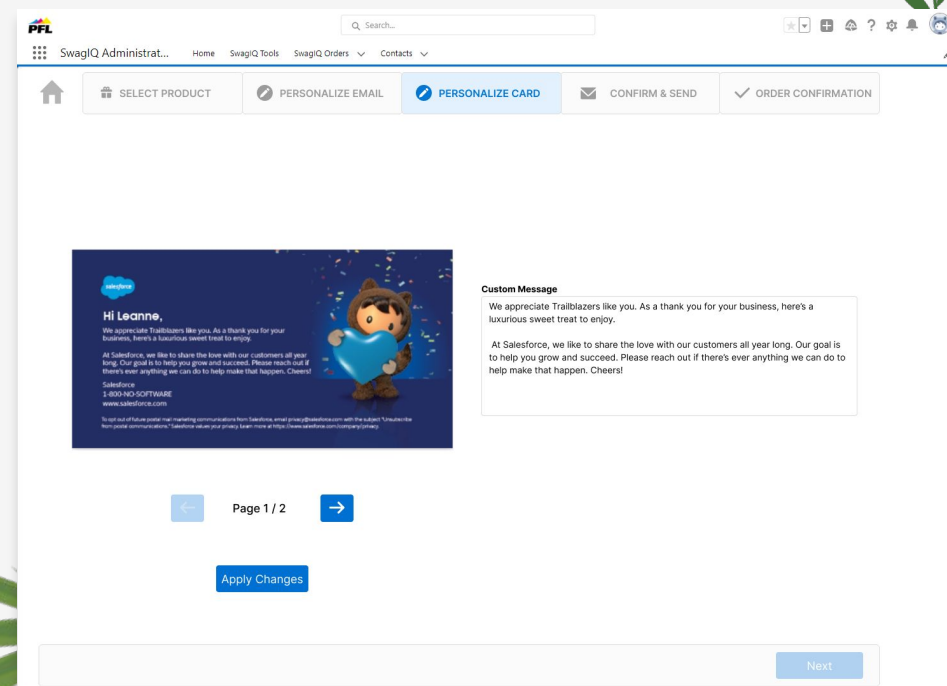
05. Confirm & send

05a. **Configure address**

05b. Submit send

Congratulations, you are on the homestretch!

Now, it's time to verify all order information and send:

📬 **Direct send:** confirm or edit the **shipping address** you want to use for this one-time send. To edit, click the Edit icon to the right of the address. Note: if you enter a new shipping address, it will only be used for this one send and NOT be saved to the contact record (in accordance with Salesforce privacy standards).

💻 **Email send:** confirm or edit the **email address** you want to use for this send. To edit, click the Edit icon to the right of the address.

SELECT PRODUCT | PERSONALIZE CARD | CONFIRM & SEND | ORDER CONFIRMATION

Godiva Thank You Mailer
$62.52

Confirm Address

Jessica Robinson
100 E Main Street
Bozeman, MT 59714
USA

Last sent on 2022-01-12 by John Doe

Place Order

05. Confirm & send

05a.   Configure address

05b.   Submit send

Ready? Click "Place Order".

Congrats, on submitting your order! 🎉

📬   For a **Direct Send**, this will kick start the fulfillment process to kit & send. Your package should be delivered within **3-5 business days (US)** or **5-10 business days (international/Canada)**.

💻   For an **Email Send**, this will generate an email to your contact to redeem their gift by submitting their mailing address. You will also get a BCC copy of the email. As soon as your contact submits a mailing address, you will be notified by email. Your package should be delivered within **3-5 business days (US)** or **5-10 business days (international/Canada)**.

Kudos on sending your mailer!
Now, it's time to track and follow up.

Now you're here

Sending your mailer

After sending

07
Follow up

06
Track

salesforce
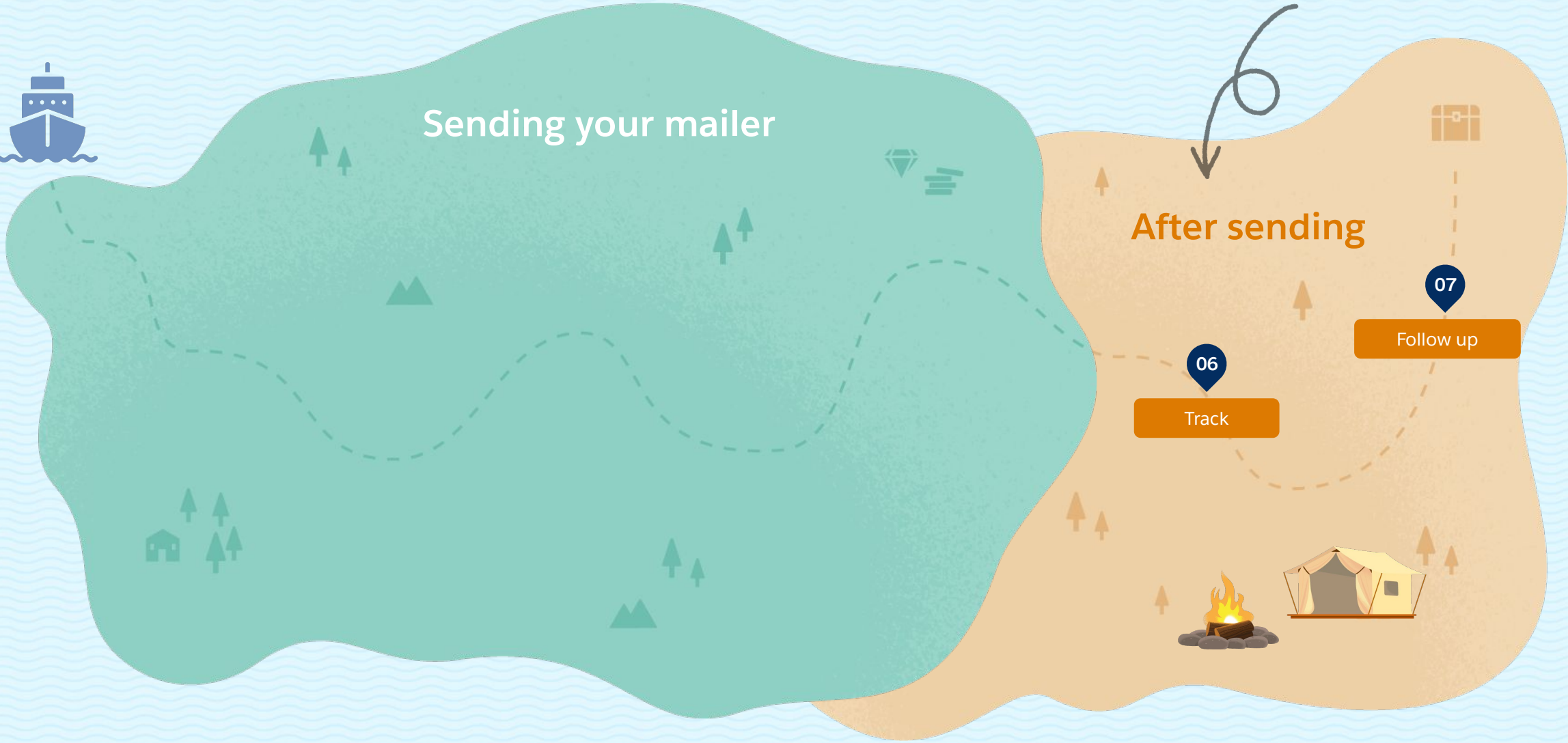
Tracking

SwagIQ's fulfilment vendor, PFL, typically ships orders via FedEx 3-day (after completed requests).

- Expect most packages to be delivered **3 to 5 business days** (US) or **5-10 business days** (international) after:

  - 📬 Direct Send: you placing your order
  - 💻 Email Send: your contact submitting an address

- Track your order status by going to your contact record and clicking on **"SwagIQ order status."**

- Your mailer status will be updated **every 24 hours.** A recipient of an e-mail send has 10 business days to redeem their gift (check back to see if they've claimed their gift)

- You can also pull a <u>report</u> right in Salesforce to see all of your SwagIQ orders in the last 30 days .

- As soon as your gift has been delivered, you will receive an **Org62 task** for a perfectly timed follow-up!

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Your prospect just provided an address for Swag!

S salesforceswagiq@pfl.com
To 🔴 Leah Murphy

⚡PFL

Leah Murphy just accepted your offer to send the Kit | MTM | VBM. Now would be a great time to call because Leah just showed engagement. When the package is delivered, you'll see a Follow Up task in Salesforce, letting you know the perfect time for a high impact follow up call.

Your SwagIQ Support Team

Contact
Ms. Taylor Swift

Title	Account Name	Phone (2) ▼	Email	Contact Owner
Singer	Global Media	555-555-5555	katrin@pfl.com	👤 Katrin Blake

+ Follow   New Case   New Note   Clone   ▼

Related   Details   News

⚠️ We found no potential duplicates of this Contact.

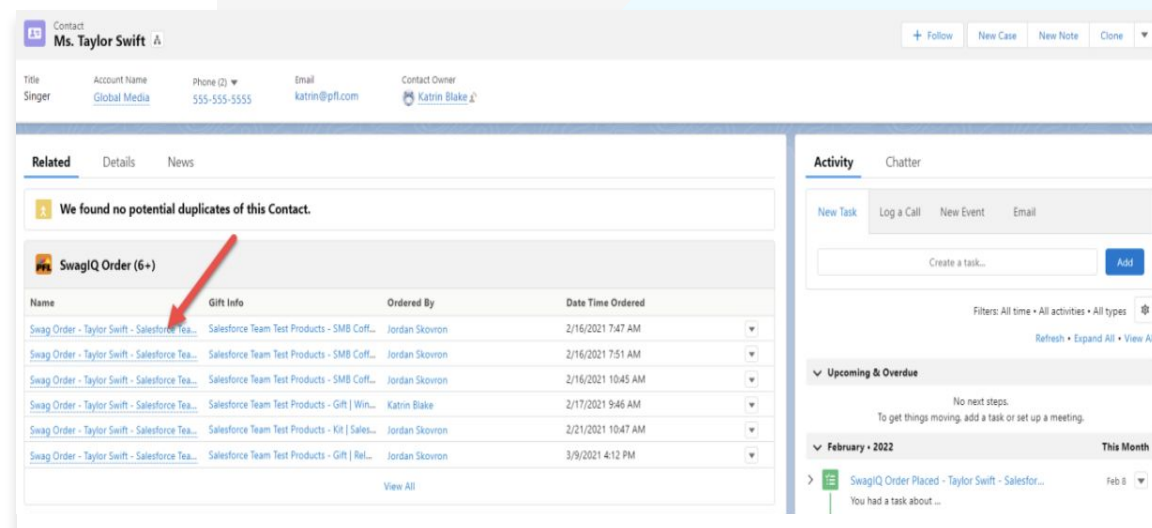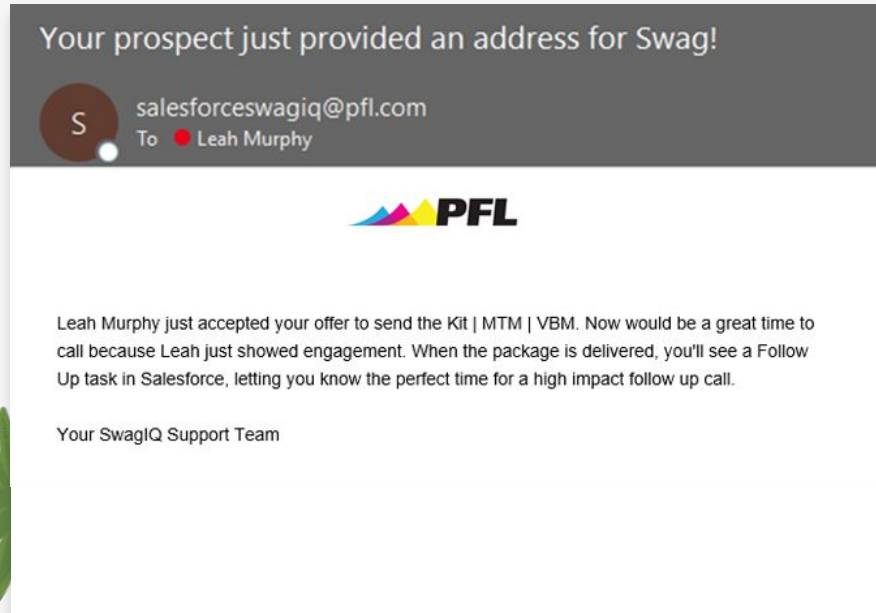**SwagIQ Order (6+)**

Name	Gift Info	Ordered By	Date Time Ordered	
Swag Order - Taylor Swift - Salesforce Tea...	Salesforce Team Test Products - SMB Coff...	Jordan Skovron	2/16/2021 7:47 AM	▼
Swag Order - Taylor Swift - Salesforce Tea...	Salesforce Team Test Products - SMB Coff...	Jordan Skovron	2/16/2021 7:51 AM	▼
Swag Order - Taylor Swift - Salesforce Tea...	Salesforce Team Test Products - SMB Coff...	Jordan Skovron	2/16/2021 10:45 AM	▼
Swag Order - Taylor Swift - Salesforce Tea...	Salesforce Team Test Products - Gift	Win...	Katrin Blake	2/17/2021 9:46 AM	▼
Swag Order - Taylor Swift - Salesforce Tea...	Salesforce Team Test Products - Kit	Sales...	Jordan Skovron	2/21/2021 10:47 AM	▼
Swag Order - Taylor Swift - Salesforce Tea...	Salesforce Team Test Products - Gift	Rel...	Jordan Skovron	3/9/2021 4:12 PM	▼

View All

Activity   Chatter

New Task   Log a Call   New Event   Email

Create a task...   Add

Filters: All time • All activities • All types ⚙

Refresh • Expand All • View All

∨ Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

∨ February • 2022   This Month

SwagIQ Order Placed - Taylor Swift - Salesfor...   Feb 8
You had a task about ...

Tracking Status Glossary

salesforce

Here is your status glossary, to help track your swag. Your mailer status is updated every 24 hours.

For email sends

- **Email Sent:** Only for email sends. email is on its way to the server.
- **Email Opened:** Only for email sends - email has been opened by the recipient.
- **Email Clicked:** Only for email sends - Link within email has been clicked.
- **Email Responded:** The contact has redeemed the kit.
- **Request Expired:** Only for email sends. If the recipient has not submitted their address after 10 business days, the request expires. Wait until 10 days have passed before sending a second email, so your contact doesn't redeem a gift twice.
- **Order Submitted:** Status will stay at "Submitted" until the Contact has redeemed (watch for it to progress to "Order Placed, "Shipped" and "Delivered."

For both direct and email sends

- **Order Placed:** Order is received by PFL and the request is being processed.
- **Order Shipped:** Your kit has left the warehouse and is on its way! From your contact record, click "Tracking Information" for your tracking number.
- **Order Delivered:** The kit has arrived at your contact's address! You will receive a task notification for follow up.
- **Order Cancelled:** PFL has cancelled your order, contact them directly.
- **Failed to Place Order:** Information is missing to complete your order.
- **Unable to Deliver:** The parcel was refused/ the address no longer exists.

Initial Status	Failed	Success
Submitted	Unable to Deliver	Order Confirmed
Order Request Processing	Request Expired	Shipped
Email Bounced	Order Cancelled	Delivered

Initial Status	Failed	Success
Submitted	Unable to Deliver	Order Confirmed

Following-up

Follow up best practices to keep in mind:

✅ If your contact hasn't redeemed your kit within 3-5 days, send them a little **personal nudge**. Once your package has been delivered, connect with them as soon as possible – while it's still fresh in their minds.

✅ **Timing is everything.** After your kit is delivered, don't wait too long to follow-up after your – especially if you already have a good cadence of communication.

✅ **Follow up with an email and/or call.** This is a great opportunity to leverage your mailer as a touchpoint. Reference the gift and ask how they've been enjoying it. For example: if you sent them a book, let them know what you yourself liked about it. Ask them for their thoughts and invite them to a discussion after they read it. Sending them coffee? Let them know you would love to chat over a cup of coffee soon. A follow-up doesn't have to be an email. Consider picking up the phone.

✅ **Follow up on your call-to-action.** Reference the call-to-action you mentioned in your notecard. Were you hoping for a meeting? Ask what time is best for them! Recommend specific next best steps.

Dear Linnea,

I have been working with your leaders Jennifer Gamble and Jenni Crenshaw, although I don't believe we've had a chance to connect one on one. I manage Salesforce's central region focused on Customer Experience/Global Support solutions.

I understand your team does a book club. We provided Jennifer and Jenni with the 'Effortless Experience' book; it is a great read I highly recommend! The link below will send you a free copy.

We are excited about the conversations we've had with your team. Please do not hesitate to reach out to me directly. I am happy to set up a 1:1 to ensure we are in alignment.

[Claim Your Special Gift*]

Thank You!
Emily Schernecker
(414) 793-8287
eschernecker@salesforce.com

salesforce

Emily Schernecker
to LGeiss ▾

It's one I've read many times. I'd love to hear what you think after you have a chance to read it.

Emily

Pro Tip: Once your SwagIQ package has been delivered, follow up with a maximum of 3 touches (email, phone, LinkedIn outreach) over the course of 2 weeks.

Kudos, you've made it through.

Now, blaze your trail to more successful mailers ahead.

Key takeaways

Sales Playbook Summary

SwagIQ 101

- SwagIQ is a tool inside **Org62** to send high-impact, **personalized 1:1** mailers to your prospects and customers.
- SwagIQ is about **investing in customer relationships** and **building trust** as a Salesforce core value.
- **Regularly use SwagIQ** to forge and grow trusted relationships. Keep at it to see response rates climb and a pipeline full of opportunities.

Sending your mailer

- **Before** initiating a send, **warm up** your prospect with **2-3 touches**.
- Verify your recipient has not **opted out** of marketing communication.
- **Let your contact know** something special is coming their way (for an Email Send, include the redemption page URL).
- Send a **thoughtful** gift that **justifies your touchpoint.**
- **Personalize** your **notecard** and **email** messaging. Metrics prove that a personalized mailer *substantially* increases redemption and success rates.
- Write the **way you speak**. Be authentic and sincere in your tone, to connect with your prospects and customers as **a partner**.
- Offer swag with *no strings attached*. Wait to ask for a meeting once your contact receives the gift.
- **Preview** and **proofread** your personalized notecard and email templates.

Tracking and follow up

- Expect your gift to be delivered **3 to 5 business days (US)** or **5-10 business days (international)** after placing your order or after your contact submits a preferred address.
- **Track your order** status by going to your contact record and clicking on **"SwagIQ order status"** or go to your Org62 **"my order" report**.
- If your contact hasn't redeemed within **3-5 days**, email them a **personal reminder**. Redemption pages are active up until **10 days**.
- **Timing is everything**. As soon as your contact receives your mailer, you will receive an **Org62 task**. Follow up with an email and/or call as soon as possible – while your mailer is still top of mind.
- **Leverage your team.** You're not alone – find out what your teammates are doing with SwagIQ mailers and what works for them. After all, you share a common product and audience.
- **Test, adapt, and test again.** Use your experiences to guide you and your own best practises. Track your results and explore what works for you and your audiences. Don't be afraid to test new strategies. Send at different times of the year, use a different call to action, try a new cadence for follow-up.

Here's to moving the needle. Together.

Best of luck from all of us on you SwagIQ team.

May the swag be with you!

Got questions?
Get answers.

Join #swagiq on Slack >

SwagIQ access?

[Read this concierge article](#)

Order support?

Contact **salesforce@pfl.com**

Tech support?

Email **swagsupport@pfl.com** with a

fullscreen screenshot that includes

the URL of the error message.

Here's to moving the needle. Together.

May the swag be with you!

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Got questions? Get answers.
Ask your SwagIQ Slackbot in #swagiq channel.
While you're there, pick a topic to find FAQ most relevant to you.

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SwagIQ inventory >

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