Do’s and Don’ts for Client Gifts Over the Holidays

The holidays are a great time to connect with clients and show your appreciation for their business. That said, I have learned through the years that giving gifts to clients can end in disaster if you don’t have a thoughtful plan. In an effort to help guide you in the right direction, I’d like to share some do’s and don’ts for giving gifts to clients over the holidays.

Don’t buy gifts that will end up in the trash.

Most companies have the basics handled. The world has gone digital, and your clients don’t need a calendar to put on the wall near their desk. Unless they are a car enthusiast and you gave them images of their favorite automobiles, it’s not likely that they’ll hang your company calendar next to their desktop.

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Your clients don’t need branded merchandise either. It is doubtful they’ll end up in a meeting with a pad folio donning your company’s logo. It is impersonal to gift your client something that your company uses as a marketing tool, and those promotional items will likely end up in the trash. Gifts should be special and curated for each client based on his or her personal tastes vs. a branding opportunity.

Don’t overdo it.

Your client should be impressed with the results you deliver

rather than from an over-the-top gift. Many clients know one another, so it is a good idea to treat everyone equally when it comes to gifting. If one client finds out that another client received a much nicer gift, he or she may feel underappreciated and that could backfire.

It is important to get to know your client before deciding on what kind of gift to send. This is an opportunity to strengthen your bond for the coming year.

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Don’t send the same gift to everyone.

I can’t stress the importance of personalization enough when it comes to giving gifts to clients over the holidays. Many people have dietary restrictions and sending a box of chocolates to a diabetic, or a bottle of wine to someone that doesn’t drink, is the worst faux pas. If you need help, take a look at notes from previous meetings, or speak to a partner or assistant to gain some additional intel.

Do think of something your client will appreciate.

Be thoughtful. Developing a rapport with your clients is important throughout the year. Use the holidays as an opportunity to let them know you were listening. For example, if your client has a child who is graduating from college, send a gift to the client for the child with a note of congratulations. That will illustrate that you have kept mental notes from personal conversations and show that you care.

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Do remember it is not always about giving gifts.

Reach out and connect with your clients on a personal level, and give them a call to wish them a happy holiday season. Sometimes a simple gesture is all they need and they won't forget it. Maya Angelou famously said that "people will forget what you said, people will forget what you did, but people will never forget how you made them feel."

If you do insist on sending a gift, remember that the note is just as important as what is inside the box. One UBS advisor sends over 700 handwritten letters to his biggest and most loyal clients. He makes the effort to personalize each one with a photo from a trip he has taken each year. Clients recognize that it takes time to hand write a personal note and that is a wonderful gift to receive in the digital age.

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Do make sure you have the correct mailing address.

There's nothing worse than getting a card or gift back after attempting to send it to a client. It shows negligence in the relationship you have with her. Sending a gift to a client with the wrong address is almost as bad as misspelling her name. Be sure to double check the mailing address, and the spelling of your client's name, before mailing your holiday gift or card.

The holidays are a time to build relationships, strengthen bonds and have fun. Your gifts should focus on your connection

with your client and convey a sincere good wish from your heart. David Parnes and I like to donate money in our clients' names to charity during the holidays. There is nothing better than banding together to make a difference in the world and ending the year on a positive note by helping others who are less fortunate. In my opinion, giving back is the best gift of all.