



SURPRISE & DELIGHT



Building Customer Loyalty 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. “Surprise and Delight” has a direct impact on retaining clients as well as acquiring new clients through referrals. Aim to deliver one Surprise and Delight for each client per year; remember to segment your list to allow for budget, time management and level of opportunity.

How to implement a “Surprise and Delight” process:

- **Make it personal!** The more unique and specific you can make a “Surprise and Delight” opportunity, the more it will mean to your client.
- **Segment your list.** Identify top clients that you want to focus on with more personal “Surprise and Delight” opportunities. Identify hobbies, upcoming events and life stages.
- **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** 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.



SURPRISE AND DELIGHT IDEAS

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. When possible, implement and follow a standard to select gifts tailored to the individual client to maximize impact.

Office “Surprise and Delight”

- 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.

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 a bride-to-be, send a bouquet to her place of work 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.

Client Anniversary/Birthday/Wedding Anniversary

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

Death of a Loved One

- Plant a tree for a deceased client or on behalf of a client's loved one. Companies like 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.

Get Well

- 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 Door Dash, 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 under the weather. Search for "Giggling Happy Pill" online for different purchase options. Sounds cheesy, but we promise they'll love it.



CUSTOM GIFT BASKET IDEAS

- **Wine Lover:** A bottle of wine, electric bottle opener, bottle stopper, fun or colorful glass charms, cheese board with a cutter, nice stemware.
- **Gardening Lover:** 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 stepping stone.
- **Sports Lover:** Stadium blanket, folding chair, rolling cooler, foam finger, team sweatshirt, koozies.
- **Nature Enthusiast:** Hiking socks, appropriate book, bug spray, sunscreen, headlamp, foldable water bottle.
- **Coffee Lovers:** Local coffees or teas, syrups or flavored stir sticks/spoons, mugs or insulated tumbler, biscotti, or tea cookies.
- **Congratulations:** Engraved wine/whiskey decanter with matching glasses, customized tumbler, cheeseboard with cheeses and gourmet chocolates, tickets or gift certificate to musical/theater production.



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