

Scrooge or Santa: An External Consultants Guide to Corporate Gift-Giving for the Holidays

By Danielle Taylor

The holiday season is here. Whether we celebrate it or not, there is no denying it exists. For the external consultant, its arrival marks the advent of an additional pressure: addressing the gift-giving dilemma. Do we give clients a gift, or is a card enough? What do we give? How much do we budget? What if we have no budget?

The internal consultant may be insulated from the pressure of this issue by company policy and budget constraints. The culture of the organization for which they work will establish the corporate gift-giving norms. The lone-rangers and those in smaller practices will have to give a lot of thought and planning to their holiday strategy in order to dash through the season with client goodwill intact.

Answering a couple of key questions can guide us through the holiday fog and help us avoid gift-giving gaffes.

What are our reasons for giving gifts?

When establishing holiday gift-giving principles, external consultants (ECs) need to examine the reasons for wanting to give a gift in the first place. The holidays may seem like an opportune time to:

- express appreciation to clients
- engender goodwill
- market our services.

However, the first two are the only legitimate reasons for an EC to give a client a holiday gift.

This is the one time of the year that an EC should *not* be in full marketing mode. Whereas a large part of our time is usually spent emphasizing how clients can benefit from our services, the holidays are the time to thank clients for using those services.

According to fund-raising consultant Jeane Vogel, before ECs commit enormous budgets and considerable efforts to gifts, ECs first need to con-

sider, “the nature of the client relationship, their own style of consulting, and their ability to give.” The closer the relationship, the more effort we might expend on the gift-giving efforts. A more formal relationship might warrant only a well-phrased card.

Which naturally brings us to our next question...

What do we give?

When trying to decide what to give, keep in mind that it is about the client. Under no circumstances do we want to make someone feel uncomfortable. Elaborate gifts or ones that are too personal will only embarrass both the EC and the client.

Try to find something that will reflect both the spirit of the relationship and your own personal style. Better yet, check to see if the organization has any prohibitions on receiving gifts from vendors. This will help you save time...and save face.

Once we have established that we do want to give a gift, that the client is able to freely accept, we are still faced with what to buy. There are legions of opinions from both the etiquette/image industry as well as from professional consultants. While both have weighed in heavily on the topic, there are still no clear, decisive responses on what to give.

When it comes to what *not* to give, the line in the snow is very clear: No

- alcohol
- joke gifts
- religious gifts
- sexual gifts
- promotional items or things covered in the company logo.

General guidelines for what to give bounce between something personal that reflects the needs, hobbies, and interests of the recipient to gift certificates or generic collections of holiday

music. A charitable donation in the client's name may serve as an ideal gift.

Other suggestions are to find creative ways to package the EC's products or services as a gift. Sean D'Souza, a marketing consultant and coach, suggests partnering with others who serve the same target market as you. For gifts you will each give certificates for an hour of the other's services. This is an idea that takes careful research and planning to execute well. To be a success, the service has to offer immediate, simultaneous benefit to the client recipient and to the “gift” consultant. The consultation cannot be a sales pitch of any type. It must offer solid, relevant information that meets the needs of the client.

In the end it may be easier to just send them tickets to an event sponsored by our company.

How much do we spend?

So we now know that we do not want to be inappropriate or too extravagant, but the remaining volume of gift ideas still won't fit in the stocking. Now it comes to the deal breaker: money. How much should an EC earmark for holiday gift giving?

Again it comes back to the client, the relationship, and most importantly our own budget. Are we giving gifts to all our clients or just the really special ones? Do we want to give them all the same gift or unique gifts for each?

Even the suggested spending ranges have ranges. Lisa Mirza Grotts, an etiquette and protocol consultant recommends sticking to gifts between \$10 and \$20 per recipient. Others start at \$25 and top off at \$100. All sources consulted agreed there was little justification for out-of-pocket spending to exceed \$100 per client. To do so risks the appearance of impropriety.

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having reared their children. They were firing hard, too.

When it comes to firing hard Larry Boyd is a disciple. Much of that energy, Larry says, stems from his early childhood days in South Carolina. One particular school year, 1967-68, was a key driver. The Civil Rights Movement and the Vietnam War were in full force. The public schools in Larry's tiny hometown and other southern states were also being integrated. From grades one through three Larry had attended all-black, public schools. Just before he was about to start the fourth grade, his parents received the letter informing them that Larry would have to enroll in one of the integrated schools. Not wanting to leave his friends and start all over, Larry was initially extremely reluctant. He was also fearful because he had seen marching and rioting on television and firsthand.

Larry wanted no part of going to a white school. He said it wasn't personal or that he did not want to be around

white students. He just did not want to be some place where he did not feel he was wanted. His parents even tried enrolling him in his old school on the first day of class but were told that all of his records were sent to his new school. He had to attend school there.

His parents assured him that if he did his best everything would be all right. Larry started firing hard! He took this new opportunity as a challenge to show his new white classmates, his teacher and himself that he could excel academically and in any environment, despite the adversity. He was one of three black children in the class and he soared. He soared through his remaining years at the school and on through high school, college and the military. Larry is now a manager for a successful international, non-profit organization in Philadelphia that coaches, develops, tutors and places talented minority college students in Fortune 25, 100 and 500 companies. He still maintains friendships with

many of the students from his first integrated class.

As it relates to anything you do in life, if you want to create the possibility for awesome results you have to "fire hard kid." If it means getting up super early ...if it means rewriting your class notes for the third time...if it means telling your friends that you will have to get together with them another time...if it means staying in on an absolutely gorgeous Saturday afternoon to finish studying or writing... if it means carrying additional props and supplies to make your presentations more memorable and outstanding... if it means doing tons of additional research before you interview for a job...and even if it means working for a boss or dealing with a professor or teacher that gets on your nerves, you still have to "fire hard kid."

Excerpt from the book, **From Average to Awesome: 41 Plus Gifts in 41 Plus Years (second edition)** Author, Jim Smith, Jr.



How do we want to be remembered?

Once we have the gift in hand, we are faced with presenting and delivering it to the client. These decisions should be based on the image we are

trying to project. A gift is not a replacement for respect, integrity, or proper business decorum. However, the gift presentation should further the corporate image.

This means gift wrapping. Even a gift certificate should receive extra trimmings and care prior to presentation. This additional effort reinforces the careful thought and planning that went into the gift selection in the first place. Like the gift, the outer presentation of wrapping paper and trimmings should reflect the recipient.

Attach a card with a personal note. This will reinforce both our personal caring and our attention to detail as well as clarify the spirit in which the holiday gesture is proffered. Present the gift in person. This step adds value to the whole gift-giving act. Be sure to let the client open the gift at his or her leisure. Do not require the client to open it in front of you. Remember, you are trying to make the client feel appreciated. The recipient will not be comfortable if obligated to make additional responses of appreciation after already thanking you for your thoughtfulness. Drop, accept the thanks, and dash. Do not diminish. After this considerable research, thought, and planning, do not deflect any thanks you receive with, "It was nothing." Hilka Kikenberg, founder of Etiquette International

warns, "They might believe you."

Gift giving to corporate clients adds not merely items to the EC's list but a lot of hard work. To make sure the EC does not get any coal, he or she would do well to check that list twice before following through on any gift-giving sleigh rides. Never underestimate the power of a handwritten, genuine, well-phrased note of appreciation in a holiday card to convey those same tidings of goodwill.

Danielle is president of her own training and development practice, Taylor Training & Development, which serves the non-profit sector in the Greater Philadelphia region. Visit her website at <http://www.taylortraining.com/> or contact her directly at (215) 844-1715.