

## Custom and Corporate Gifting Best Practices

- **Where to find Corporate Gifting Resources and Training**
  - [Corporate and Custom Gifting Program in the Help Center](#) - This Help Center section has all of the ins and outs of Corporate and Custom Gifting. You can find details on how to place orders, what kind of customization we offer, what PCV is earned and much more!
  - [Index of Resources](#) - Please visit the Index of Resources linked above and scroll down to “Gifting” to find all of the Gifting Shareables, One-Sheets, and much more!
  - [Custom and Corporate Gifting Training](#) - This section of the Training Center offers training videos, as well as email templates and resources that can help you build your business through Gifting!
- **Connect with the Gifting Team Early**
  - The Gifting Team recommends you introduce your Customer in an email and provide Gifting with insight on what you are offering to your Customer. This helps the Gifting Team confirm availability, turnaround time, etc. and avoids any roadblocks once the Customer decides to move forward.
  - When you email the Gifting Team, we suggest using the following verbiage so that any member of our team can assist!
    - I have included our ONEHOPE Gifting Team on this email to assist with mockups and any questions you may have. One of our Gifting Specialists will be in touch with next steps.
  - When submitting gifting emails, please try to keep each order in its own email chain and make the subject line of the email the “Company Name” Corporate Gifting. This helps our team stay organized with each order’s details, such as what they are looking to order, what proof is approved, etc.
  - Also, please ask your Customer if there is a specific need date so that the Gifting Team can advise if the option is feasible in the requested time period.
- **Assist Customers with Custom Gift Options**
  - If your client is interested in any of our Customer offerings, we recommend finding out exactly what they are interested in (i.e stickers, etching. etc) and providing a proposal to them with the specific options and pricing. This helps to avoid any confusion with which products can have a particular customization offering.
  - Please help Customers narrow down their Custom Gift Options to 4. This can be 3 wine options and 1 non-alcoholic option (if needed). This helps the Warehouse Teams ensure a smooth Fulfillment Process with no errors.
  - For more details on Custom Gifting Options, visit the following articles in the Help Center.
    - [How do I add a Custom Logo or Etching?](#)
    - [What is Build Your Own Gift?](#)

- **Assist Customers in Tracking their Custom/Bulk Orders**
  - Once the Gifting Order ships, the Gifting team will follow up with a spreadsheet that includes tracking numbers for each gift. FedEx allows you to add 25 numbers at a time for real-time tracking updates, so we recommend that you refer to this resource if your client has any questions about the status of an order once it is in transit.
    - [FedEx Tracking](#)
  - If any gifts need troubleshooting once in FedEx's hands, please reach out to the Gifting Team so they can assist. Please note, the Gifting Department does not check the status of gifts once the gifts have been shipped and tracking has been shared.
- **Gifting Orders - Submit 10% Donation Form**
  - Gifting orders cannot be applied towards an online event or fundraiser, however, it does qualify for its own 10% donation to the charity of your choice! We ask that the CE submits the donation on behalf of their Customer. Donations for Custom/Gifting Orders should be submitted within 1 month of the invoice being paid.
  - For more information on how to submit the donation and ensure the donation has been made, please visit the following article in the Help Center:
    - [Do Corporate or Custom Orders qualify for a Donation?](#)
- **Customer Reward Points on Custom/Gifting Orders**
  - Because Customer Reward Points from custom gifting orders are manually applied and not all corporate clients have Customer profiles, we do not automatically add Customer reward points. We ask that the CE requests the points be added at the time of purchase and notate if the Customer is a Wine Club member.
  - Please note we can only add the Reward Points to the Customer's profile for future use. We cannot add it to the CE's account.
  - For more information on Customer Rewards and Gifting Orders, please refer to the following HelpCenter Article:
    - [Do Wine Club members receive discounts or Customer rewards on custom orders?](#)
- **When to request sample mockups**
  - CEs can submit mockup requests at any stage of your selling process. We understand that some Customers would like to have a visual mockup before submitting the details for the order. However, we do prefer that you ask your Customer what they would like to see for the etching. For example, do they like the Home Sweet Home + their logo? Do they want their logo to be the focal point of customization? Do they want any contact information or additional message on their gift? This allows our Team to work together to create the best mockup for the Customer as quickly as possible. Please note this mockup is a digital sample.
  - For more information on Customization, please refer to the following Help Center Article:

- [How Do I add a Custom Logo or Etching?](#)
- [Corporate Gifting Logos Guide](#)
- **Reviewing Order Forms on Behalf of your Customer**
  - When you receive the Order Form from your Customer, please review the order form and ensure the Billing Tab is filled out, as well as check for any locations where we have restrictions (i.e non-wine states, PO Boxes, and orders outside of the continental U.S)
  - The Billing Tab is what the Gifting Team uses to determine the tax for the invoice so it is important that this information is provided at time of processing.
  - It is also extremely helpful for the CE to assist with checking for non-wine states so that we can determine if the Customer is interested in coming up with a non-alcoholic gift option or would prefer to just remove these recipients.
  - For more information on Order Forms or to download them, please refer to this article in the Help Center:
    - [How Do I Submit an Order for Corporate + Custom Gifting?](#)