THE BRAND CONCIERGE

The Brand Moments Playbook

Your brand merchandise. Your moments. One place to manage it all. Every welcome kit, event giveaway, deal gift and renewal thank-you is a branded moment your customers and employees can hold. This playbook shows which moments matter across the customer and employee lifecycle, what to send, what to spend, and how your concierge plans it all months ahead, not the week before.

01

Meet the moment

Tie every send to a real lifecycle moment (a hire, a meeting, a close, a renewal), not to leftover inventory.

02

Plan the year, not the week

Put campaigns, events and holidays on one calendar so orders go in early and rush fees disappear.

03

Spend by plan, not by guess

Give each team a budget and a per-person range, so nobody overspends and nobody under-delivers.

04

Plan every send

Every send has a home in your annual plan, so nothing is a one-off and no moment is a scramble.

ALL TEAMS

Set the foundation

A brand people remember starts with consistency. Set your standards, stock your Swag Closet and give every team its own budget, so every touchpoint is on brand, nothing goes to waste and no moment to make an impact is missed.



Lock your brand standards

WHEN · Week 1

SEND · Approved logos, colors, fonts and do-not-use rules in one place.

BUDGET · Included in onboarding

MEASURE · On-brand ordering in your health score

Stock a Swag Closet

WHEN · Month 1, then quarterly

SEND · Everyday staples (tees, notebooks, tumblers, totes) counted and tracked onsite or offsite.

BUDGET · $5–$25 per item

MEASURE · Stock levels and outdated items

Give every team a budget

WHEN · Start of the year

SEND · Annual budgets split by quarter for HR, Sales, Marketing and Client Success.

BUDGET · Typical split: 35% HR, 25% Sales & events, 20% CS, 20% brand & closet

MEASURE · Budget pace each month

HR & PEOPLE

The employee lifecycle

A team they're proud of. Day-one kits make new hires feel part of the team, and milestones that never get missed keep tenured people feeling seen.



Day-one welcome kit

WHEN · Arrives before the start date

SEND · Hoodie or quarter-zip, tumbler, notebook, laptop stickers and a note from the team.

BUDGET · $50–$90 standard · $90–$150 premium

MEASURE · New-hire ratings and 90-day retention

Work anniversaries

WHEN · 1, 3, 5, 10, 15, 20+ years

SEND · A gift that grows with tenure, from a quality tumbler to a signature piece.

BUDGET · ~$75 · $150 · $250 · $500 for 10+ years

MEASURE · Thank-yous received and retention

Make it automatic

WHEN · Always on

SEND · A standing rule: every new hire gets the welcome kit.

BUDGET · Set per rule

MEASURE · Moments caught vs missed

Holiday and appreciation

WHEN · Q4, plus SKO and milestones

SEND · A remote-friendly gift shipped to every home address.

BUDGET · $50–$100 per person by plan

MEASURE · Ratings and participation

SALES

Pipeline and deals

Sales gets its own lane. A well-timed gift gets a reply that ten emails won't. Request it directly, inside your team's budget.



Meeting booked

WHEN · Within 48 hours of booking

SEND · Premium coffee kit or branded tumbler with a note about the call.

BUDGET · $40–$90 per prospect

MEASURE · Show rate and meetings that become opportunities

Move a stalled deal

WHEN · When a deal goes quiet

SEND · Desk essentials or a gourmet snack box for the buying committee.

BUDGET · $40–$90 per contact

MEASURE · Deals re-engaged

Closed-won celebration

WHEN · The week it closes

SEND · Closed-deal celebration box for your champion and executive sponsor.

BUDGET · $150–$300 executive gift

MEASURE · Deals won and expansion later

MARKETING

Campaigns and events

Launches, webinars and events are where your brand is most visible, and where most swag gets wasted. Put them on your Brand Calendar so your concierge orders early and rush fees disappear.



Trade shows and conferences

WHEN · Ordered 3–6 weeks out

SEND · Booth items from the closet plus giveaways and VIP gifts for key accounts.

BUDGET · $3–$8 per attendee + $75–$200 VIP gifts

MEASURE · Event leads, meetings and deals

Product and feature launches

WHEN · 2–3 weeks before launch

SEND · A launch kit for the sales team and your earliest customers, plus desk drops for press and analysts.

BUDGET · $25–$60 per recipient

MEASURE · Launch-week replies and demo requests

Webinars and online events

WHEN · Within a week after the event

SEND · A thank-you for the people who showed up, and a nudge kit for the ones who didn't.

BUDGET · $15–$40 per recipient

MEASURE · Attendees who booked a meeting

CLIENT SUCCESS

The customer lifecycle

Delight that builds loyalty. A first impression that feels personal, recognition when customers advocate for you, and a reason to remember you at renewal time.



Customer welcome kit

WHEN · At kickoff

SEND · A branded welcome for the admin and champion who'll roll you out.

BUDGET · $75–$150 per contact

MEASURE · Time to first value and ratings

Renewal thank-you

WHEN · 60–90 days before renewal

SEND · A thoughtful gift tied to the results you delivered this year.

BUDGET · $75–$150 per contact

MEASURE · Renewals and expansion

Advocate and reference thanks

WHEN · After a case study, review or referral

SEND · A gift that matches the favor: they put their name on you.

BUDGET · $75–$150; more for case studies

MEASURE · Referrals and case studies

LEADERSHIP

Measure and improve

Spend you can see, plan and prove. Your concierge tracks budget pace and delivery, and walks you through what worked every quarter.

Quarterly health score

WHEN · Every quarter

SEND · A score across stock, outdated items, on-brand ordering, budget pace and on-time delivery, reviewed in your quarterly review.

BUDGET · Included

MEASURE · Score trend

Quarterly business review

WHEN · Every quarter

SEND · Spend, the four returns and next-quarter recommendations.

BUDGET · Included

MEASURE · Total returned vs spend

Annual plan check-in

WHEN · Twice a year

SEND · Revisit your key moments, budgets and Swag Closet with your concierge, and adjust the plan for the months ahead.

BUDGET · Included

MEASURE · Budget used vs planned

PLANNING

A typical year of branded moments

Q1

- Sales kickoff kits
- New-year hiring wave welcome kits
- Restock the closet

Q2

- Spring conference giveaways
- Customer advocate thank-yous
- Mid-year anniversaries

Q3

- Fall conferences and events
- Renewal push gifts
- Plan holiday budgets

Q4

- Customer and employee holiday gifts
- Year-end closed-won celebrations
- Next-year calendar planning

Budgets are industry benchmarks; your concierge tunes them to your plan and history.