

# How to Be the Best Gift Giver Ever

## *Lesson One Transcript* Planning Ahead to Make it Easy and Fun

Hi this is Barbara from Mantel and Table Academy, and welcome to **How to be the Best Gift Giver Ever!** This is lesson one - Planning Ahead to Make it Easy and Fun.

I'm so happy you've joined me for this course, because giving your friends and family fun, meaningful gifts that they really love, is one of the most satisfying things in the world. And you're not only giving them a great gift. Ultimately, you're also building relationships. You can just imagine how special they feel knowing you cared enough to give them something wonderful.

In this lesson, I'll show you how easy it is to plan your gift giving ahead of time, instead of doing the usual frantic last minute shopping, where you can barely remember who you're buying for, and don't know what they want, anyway! You likely come away with an expensive armload of mostly impersonal gifts that you – and they – aren't overly thrilled with.

Well, with this lesson, that's all going to end, and a new era of gift giving will start! We'll walk through how to:

- Create your Gift Log
- Keep track of ideas as you go along
- Find out what your recipients would really like
- Have a library of potential gifts at your fingertips
- Set gift-giving reminders, and
- Take photos during the year

I encourage you to download the lesson worksheet to fill out as we go. You'll find it in the course portal right under the video. Scroll down to the bottom of the document and click the pink link to download it.

Now you can open it, and if you have Adobe Reader, you can fill it in before you save it. Once you save, you can't put anymore in. If you have Adobe Acrobat, you can save first, then fill out and re-save anytime. If you don't have any Adobe software, or if you just WANT to, go ahead and print it out, and write in your answers!

Ok, ready? Here we go!

### *Create Your Gift Log*

The first thing you want to do is create your Gift Log. This is the place you keep track of all the people you want to give gifts to during the year. (Or in future years – we'll talk about that a little later.)

You can use any number of tools for your log – a card file, a spreadsheet, a note-taking app on your phone, a paper address book or day planner, dedicated binder, or my personal choice, the Notes section of Google Contacts. I love Google Contacts because I'm away from home so much. Since



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they're right there on my phone, it's perfect for when I'm at work, or out and about. And then when I get back to my computer, they're right there again, waiting for me. When I want to work with them as a group, I can export them into a spreadsheet. The best of both worlds!

If you'd rather use a dedicated binder or a spreadsheet, I've created printable binder pages and also an Excel template for you. They're in the Lesson One section of the course, along with quick video tutorials on how to set up and use each one.

The minimum information you need to include in your log is the recipient's name and birthdate, and any other special dates you want to remember. It's also good to include their mailing address, email address, and phone numbers.

You can also use the Event field for any other important dates, and the Custom Field for other notes. I use this for things they like or their size, etc.

Then – here's the tricky bit – use the **Notes** section to keep track of two things:

- Ideas for gifts they'd like in the future
- The gifts you've given them in the past

Keep the ideas at the top of the Notes section, and the list of what you've already given them, at the bottom. That way it's fast and easy to add any new ideas you come up with.

Below the ideas, list the previous present-occasions in this way, so they're easy to find:

- Year – Occasion - Gift

I'm a big believer in the Space-Hyphen-Space method of naming anything. If you start out with the year, then Space-Hyphen-Space, then "XMAS" or "BDAY," say, then another Space-Hyphen-Space, then "Blue cashmere butterfly scarf," not only will you be able to see – in order – everything you've given your favorite aunt over the years, but the information will present itself in an orderly way. It's *much* easier to quickly scan and grasp, than having to sort through a lot of messy or unrelated info. For instance:

- 2019 – XMAS - Blue cashmere butterfly scarf
- 2019 – BDAY – Copper sauté pan
- 2019 – ANNV – Gold vase engraved 50<sup>th</sup>
- 2020 – XMAS – Picnic basket, infused oil & vinegar, salad set
- 2020 – BDAY – Custom birthdate star chart

You'll want to think up three or four-letter abbreviations for your occasions, so they don't take up too much room, so they line up well, and so they're easy to see.

*Keep track of ideas as you go along*

Now let's talk about the ideas section. As you could probably guess, this is where you collect any ideas you get during the course of the year, about what your recipient would actually like to receive.



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You know how you're out shopping with a friend, and they see something they really like, but they don't end up getting it? Here's where you can really use your Gift Log. When their back is turned, note that thing down!

If you're talking to your sister and she mentions how excited her daughter was about visiting a tea room recently, put down "Tea things" in the Gift Log for your niece.

Or maybe you're at a party, and you overhear a couple of your friends discussing their mutual interest in the Denver Broncos. You know what to add to the log for each of them, as soon as you can slip away to a private corner.

Keeping your eyes and ears open are skills you can easily develop. And not only does it make gift ideas so much easier, but it's fun too! I love knowing more about my friends!

## *Find out what your recipients would really like*

Here are a few more ways to find out what your recipient would like:

- Glance – just casually - at their bookcase for topics or authors they're interested in.
- Do they have any collections?
- What problems are they having? Your gift could help with those. (We'll talk more about this strategy in a later lesson.)

But let's say you're not around your friend or family member very often. Maybe they only come to visit you at Christmas every couple years. Maybe they're even way younger than you, and who knows *what* kids like these days? What *then*?

Well, here are a few slightly undercover – but still totally legitimate – ways to find out more about your recipient:

- Visit their Facebook or other social accounts, and look at their posts, Friends, Groups, Hobbies, and people or brands they follow. This is all public information, and can give you a pretty good idea of their interests.
- If they have an Instagram account, click on the 'Following' button, then the 'Hashtags' tab. Hashtags are almost exclusively interest-based, so it's a great shortcut. As you can see here, I like tea and scones, setting the table, vintage teatime, and shoes!
- Or – let's not forget this one in all our sleuthing - it's perfectly fine to just up and ask one of their friends or family members, or even their own selves, what they like or are interested in. Or even what they actually want!

Just keep adding to your list as things come up, and when gift-giving time arrives, you'll be well prepared.

## *Have a library of potential gifts at your fingertips*

The next thing I recommend is creating a Potential Gifts list.

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This is where you put great general gift ideas when they come to your attention. Maybe you see something you really like, but you don't have a particular person in mind for it. Or you have *lots* of people in mind for it!

It could be a list in your phone, a small notebook or dayplanner. If you're using a dedicated binder or spreadsheet, I have a Potential Gifts printable and spreadsheet tab for you in the course portal below this video.

As an example, when I was planning my 60<sup>th</sup> birthday party, I knew wanted to give some party favor gifts to my guests. One day I just stumbled upon RetroViewers during a Google search. (These have become one of my all-time favorite gifts, as you'll see in a later lesson.) I wasn't going to order right away, but I wanted to make sure I didn't forget the company in all my other planning. So I put it into my Potential Gifts list. It was super easy to find later, when I *was* ready to order.

Using the Space-Hyphen-Space method again, my Potential Gifts list looks like this:

- Personalized reels w/my photos - RetroViewer – [retroviewerwebsite.com](http://retroviewerwebsite.com)
- Custom paint-by number kit – Bling Painting – [blingswebsite.com](http://blingswebsite.com)
- Photo puzzle – Liberty Puzzles – [libertywebsite.com](http://libertywebsite.com)

When gift-giving time comes, you can transfer info you want into your spreadsheet if it's not already there, then your Gift Log and your Potential Gift list will help you choose the perfect present.

## *Set gift-giving reminders*

Remember back at the beginning of this lesson where we mentioned planning for gift giving in the more distant future? Now we get to find out what that's all about.

Maybe you were in your friends' wedding, and for their 5<sup>th</sup> anniversary, you want to give them another bottle of the champagne they toasted with.

Or maybe one of your family members has a milestone birthday coming up in a couple years. You don't want it to pass by without special recognition.

There's a super easy way to handle this, and as you could probably guess, it hinges on having a calendar system that works for you. I use kind of a hybrid system these days, involving a couple different styles of calendar.

- There's the traditional paper wall calendar, or
- A paper planner like Day Timer or Franklin Planner.
- You could use a card file,
- or a Google, Outlook, or other electronic calendar.
- Or you could use project management app like Trello or Monday.com.

Here's how I use each of those.

My husband and I keep a lovely yearly wall calendar in our kitchen and write our various appointments on it so we both know what's going on in the household. If something will be



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happening in the next calendar year, I write those future-year events at the end of December. Then when we get our calendar for the next year, I have no problem remembering to transfer them over to the new one. And if the event is *several* years down the road, I just keep transferring it into the end of December until the proper year shows up!

This same process applies to a paper planner.

Another paper-based option, which is my favorite if you work mostly from one place, is a card file. I've used one of these for over 40 years. It's based on a book I got years and years ago, and features a tab for each month. I make cards for every task, each appointment, and each thing I want to remember – 5<sup>th</sup> anniversary, anyone? – then file it in the correct month. When that month comes up, if it's not the correct year, I just keep it in there instead of refiling. SO easy, and I never forget anything!

As for electronic calendars, there are any number of them you can use. The calendar that comes with free Google accounts is just great. Or if you use the Microsoft suite, Outlook is a fabulous tool. There are all kinds of online calendars out there, and any of them will go as far into the future as you could ever want. Just find the correct year, then set yourself a reminder.

You'll want to set it for a couple weeks or months in advance, so you'll have time to order, wrap, and send your amazing and thoughtful gift. Your friends will be so impressed, not only with the gift, but with the fact that you were sweet enough to remember!

And finally, you can find some really cool project management tools that almost exactly duplicate the card file experience, but on your computer or phone. Most of them have a free plan, but they might not include the calendar view, which is what I like to use for a card file alternative.

You can move the "cards" to or from any date on the calendar. Just exactly like a physical card file, and it's so useful to see it all laid out.

I don't have any free versions to recommend, but Trello is a good one if you don't mind a small monthly payment. I also use Trello for actual project and event planning, and I LOVE it for that.

I only have one caveat about calendars, electronic or otherwise. You have to actually look at them for them to work! If I'm going through a forgetful period, I set an audio alarm on my phone. That really helps to remind me to check my calendar every day, or remember something specific.

## *Take photos during the year*

Another way to plan ahead, is to remember to take photos of your friends and family during the year.

We'll talk about this more later, but one element of some of the best gifts, is personalization with photographs. So *having* photographs, is key.

I'm often so busy having fun, that I forget to take pictures! I don't like the idea of seeing the excitement through my camera lens instead of actually experiencing it, but I've learned to take one or two group shots during each event – my friends and family are happy to pose in front of the raft they had so much fun in. Or at the table where we're having such a wonderful dinner. And one photo per



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event is plenty for our gift-giving purposes. (Be sure to get yourself in the pictures as well – getting good at taking selfies is a skill worth learning!)

If it comes down to the point, and you don't have a photo of a particular person or event, you can always ask a friend or family member to share some of theirs.

Another major thing about photographs, is that you want to be able to actually find them when you want to! Get in the habit of naming your photos right on your phone, right when you take them. I label each one with the names of the people in them, the event, and where it was taken. The date and location automatically show up on my phone. If they don't on yours, you can set that up in your phone settings.

Be sure to store your photos in a way that makes sense to you, and be double sure to have a backup! Preferably this would be an external hard drive, even if you have online backup.

## *Recap*

In this lesson, we covered how to plan ahead by creating a Gift Log to keep your recipients and gifts organized. We looked at how to keep track of great gift ideas as you go along, and how to figure out what your friends and family really want. We discussed how to set up an ongoing library of potential gifts, and we touched on setting reminders, and taking pictures during the year so you'll have them for custom gifts.

## *Download Your Resources & Worksheet*

Now, go ahead and download the lesson summary, the printables, and the Excel template to create your Gift Log.

Also, take a look at the quick tutorial videos for your preferred gift log method if you want.

And if you haven't already, download your worksheet for this lesson, which is right below the video. You can either print it out or fill it in on your computer. Just be sure to fill out the copy you downloaded, otherwise your work won't save.

Then take a few minutes to set up your gift log, your potential gifts list, and set your reminders.

When you're done, I'll meet you over in Lesson Two!