

THE COMPLETE CLIENT PARTY CHECKLIST

Client parties are fun and festive ways to connect with your clients. With a little bit of preparation, you can plan a memorable event that's sure to get your clients talking. Planning your next get together is a breeze with this handy checklist.

2 MONTHS

- Set your budget
- Set a date
- Reserve services: venue, caterer, photographer, DJ or live musicians
- Send Save the Date cards
- Choose a theme
- Create your guest list, including top clients as well as the vendors you work with the most, such as lenders, attorneys, home inspectors, etc.

1 MONTH

- Call to invite your guests
- Mail or email your invitations
- Purchase party favors and raffle items

2 WEEKS

- Check in with the invited guests who haven't yet responded
- Call to confirm attendance

1 WEEK

- Send out email reminders
- Touch base with the photographer
- Create a music list
- Confirm the menu with the caterer
- Purchase decorations
- Assemble favors and raffle items

1-2 DAYS

- Stock up on drinks, snacks and food that's not being catered

DAY OF THE PARTY

- Get to the venue early to set up
- Meet the vendors and get them situated
- Greet each guest as they arrive
- Thank your guests for coming to the party, as well as for their business and referrals

**PRO
TIP!**

**AFTER
THE
PARTY**

- Send a personal note to all attendees
- Update your database
- Send a personal note to your guests who didn't attend the party

FUN & EASY EVENT IDEAS

DOG DAYS OF SUMMER

Have a gathering at a local dog park for your clients and their fur babies. Don't forget treats for both "two-legged" and "four-legged" friends!

NAILED IT!

Invite your top clients who have school-age kids to a morning at the nail salon for post-summer mani/pedis! It's toe-tally awesome!

BACK TO SCHOOL IS COOL!

Host a pizza party at a local joint the first Friday night after school starts. Getting back into the swing of things can be difficult... help your clients make the transition as easy as pie (pizza pie, that is!).

BON[DING] FIRE

End of the summer is a great time to get all of your clients together and have an outdoor party/bbq. Try and have it at a lake/beach/park that allows fires and top the evening off with s'mores!

