

THE COMPLETE Client Party Checklist

Client parties are a fun and festive way 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

After the Party

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

FUN & EASY

Event Ideas

Any Way You Slice It!

Host a pie-pick-up party. Send a survey to your clients and request which type of pie (give them a choice of 2 or 3) they would like to have gifted to them when they attend. It's a great way to gather your clients together and help take something off their plate (while still putting something on it).

Gather with A Grateful Heart

Organize a food drive to help a local food pantry. Drop off empty grocery bags with a list of items that the local donation centers are requesting. Designate a location, date and time frame for your clients to bring their full bags back to you. Set up some treats and drinks so your clients can mingle and enjoy each other's company.

Stirring Up Some Good Times!

Football season is in full swing. Designate one Sunday afternoon to gather your clients together and have them show off their culinary skills. Everyone has a chili recipe they swear by, so encourage them to share it with others in a healthy and delicious competition. Make sure your local (or favorite) team is represented on the TV so no one has to miss a minute of the old pigskin.

Tip:

Create a Gratitude Tree for your clients to fill out leaves and attach sentiments of thanks and appreciation for things in their lives.

