

VIRTUAL CLIENT PARTY CHECKLIST

It's time for a little connection — social distancing style! Now is the time to reconnect with your clients safely in-person or catch up virtually. There's an option for everyone based the health and safety guidelines in your area!

✓ 1 Week Before

- Set a date and time.
- Research and decide which video platform you would like to use.
- Create a guest list including top clients as well as the vendors you work with the most, such as lenders, attorneys, home inspectors, etc.
- Keep your guest list under 8-10 guests. If more than 10 people are attending, consider appointing a monitor to help the conversation run smoothly or having multiple virtual events.
- Call to invite your guests.
- Email your invitations with the link or phone number your guests need to log into your digital gathering.

✓ 1-2 Days Before

- Check in with invited guests who've not responded.
- Send out a reminder email with a link to the virtual gathering.
- Decide what you'll be having to eat and drink.

✓ Day of the Party

- Get to your location early to set up and connect to your virtual chat.
- Greet each guest as they sign on and introduce them to guests who have already joined.
- 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 that were unable to attend the party.
- Send a personal note to all attendees.
- Update your database.

FUN & EASY VIRTUAL EVENT IDEAS:

It's Your Move

Here's some fun for all ages — bond with your clients over a virtual game night! Use Pogo to access tons of the classic multiplayer boardgames, or if you are looking for something new, try out Jackbox. Take a vote to find out what your clients' favorites. Then connect on your preferred video chat platform and make a night of it! Suggest that your clients have their favorite snacks and drinks ready. Maybe even share a few fun ideas with them!



Beers To You

Support your local brewery by hosting a beer-tasting event. Make this one a hybrid! Clients who are comfortable meeting in person with social distancing can head over to your backyard, and clients who'd like to stay home can participate via your preferred video chat platform.

Purchase a tasting pack or two from your favorite brewery and research the characteristics of those beers so you can lead the tasting. You can communicate appearance, aroma, flavor and mouthfeel, as well as alcohol content, bitterness, and color. Don't forget to grab some individually wrapped pretzels and disposable cups. Or go the extra mile and purchase a pint glass as a gift for your clients! Remember to schedule time with your virtual attendees before the event for you to drop off the supplies.

