



Virtual

CLIENT PARTY CHECKLIST

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
- Create an invitation. Evite.com has a section on their website dedicated to virtual event invitations
- 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 haven't yet responded
- Send out a reminder email with the digital gathering link
- Decide what venue you would like to call in from an open area outdoors or your living room
- 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

We may not be able to get our clients together for a physical party, but that doesn't mean we still can't get together virtually! Thanks to video chat platforms such as: Zoom, FaceTime, Skype and Google Hangouts, we can stay connected to our clients and ensure that they know, now more than ever, that you're here for them.

Fun & Easy Virtual Event Ideas:

Family Friendly Picnic



Invite your clients to join you for a virtual picnic. The parks and beaches may be closed, but that doesn't mean you can't bring a blanket and lunch to an open area and enjoy the fresh air. Too cold to go outside? Take the picnic indoors and enjoy the virtual gathering from the comfort of your own home.

Cheers!

Host a virtual happy hour or coffee talk for your clients to get together and socialize. Pick a day and time for your gathering and encourage your guests to bring their favorite drink and great conversation. Social distancing can be lonely at times but having a drink among friends can lift everyone's spirits and help fill that social void.

