

The Complete

Client Party CHECKLIST

FUN & EASY EVENT IDEAS

February is the month of love so take some time to show it to those who mean the most to you. Share the love by hosting a virtual or drive-by Client Appreciation Party.

Drive-by

The Perfect Pair



Show your clients how much you love them by making them your Valentine this year. Invite your clients to pick up chocolate-covered strawberries and a bottle of champagne or sparkling cider. Really get in the spirit and decorate your driveway in red and pink!

Virtual

Cocktail Shake-Up



Ask your clients to join you from their kitchens for a fun night of crafting cocktails (or mocktails)! Pick a theme and find a mixologist to lead a class. Make sure to share the recipe ahead of time so everyone has the necessary ingredients. Go the extra mile and deliver the ingredients or glassware to your clients before the get-together!

* Please follow the health and safety guidelines in your area.

1 Month

- Set your budget
- Set a date and time
- 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.

If virtual - Keep your guest list around 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.

- Reserve any location or book any services needed

If virtual - research and decide which video platform you would like to use.

- Call to invite your guests
- Mail or email your invitations

If virtual - include the link or phone number your guests need to log into your digital gathering.

2 Weeks

- Check in with the invited guests who haven't yet responded
- Call to confirm attendance
- Purchase party favors and raffle items

1 Week

- Send out email reminders
- If virtual* - include the link to your gathering
- Create a music list
- Confirm vendor details
- 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

- Log in or get to your location early to set up
- Meet the vendors and get them situated
- Greet each guest as they arrive or sign on to your virtual platform
- Thank your guests for coming to the party, as well as for their business and referrals

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