the complete
client party
CHECKLIST

With Mother's Day and Customer Appreciation Day in May, this is the perfect time to show your appreciation with a client party. Use this handy checklist to host a virtual or socially-distanced event to connect with your clients and celebrate the moms and mothers-to-be!

fun & easy event ideas

Mother's Spa Day

Treat the moms in your database to a well-deserved spa day. Prepare pampering baskets for each guest with an aromatherapy candle, face mask, nail polish and body lotion. During the party, turn on relaxing music and lead guests through a guided meditation together. If hosting virtually, drop off the spa baskets in advance and use your favorite online platform.

Family Photoshoot

Give your A+ clients a memento they will cherish forever: a photo of their family. Hire a local photographer, set up a spring-themed photo display or backdrop outside and schedule 15-minute time slots for each client and their household to take family pictures.

* 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 small, around 8-10 guests, to help the conversation run smoothly.*
- ☐ Reserve the 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 and supplies
- ☐ 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
  - *If virtual - drop off supplies or favors to guests before the event begins*

After the Party

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