

THE COMPLETE
Client Party

★ CHECKLIST ★

This month, cheers to summer, sunshine and your amazing A+ clients! Use this handy checklist to plan a festive appreciation party to connect with your top clients and thank them for their referrals.

FUN & EASY
★ EVENT IDEAS ★

★ RELAX, RENEW, RECHARGE

Help your clients recharge for the second half of the year by hosting a private yoga class - whether in a studio, outside or virtually. Hire a local instructor, gift new yoga mats, water bottles or towels to your guests and serve your favorite cold-pressed juice.

★ GRILL ME UP!

Who doesn't love a summer BBQ? Invite your clients and their family to join you outdoors, in your backyard or at a local park, for hot dogs, burgers, drinks and fun lawn games!

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

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

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