

# THE COMPLETE Client Party

## CHECKLIST

Close out summer with a client party to show how much you appreciate your A+ clients and their referrals. These unique and fun party ideas will be sure to keep you top of mind all year long!

### Easy & Fun Party Ideas



#### End-of-Summer Bonfire

Gather your top clients around the fire to say goodbye to summer. Rent a backyard fire pit (if you don't already own one) or reserve a pit at your local beach. Set-up chairs, blankets and refreshments for your guests as well as yummy things they can roast — s'mores, hot dogs and corn on the cob.



#### Aloha Summer Luau

Enjoy these last few days of summer with some tropical fun. Make your luau interactive and encourage guests to come in their most festive attire. Nothing says Aloha like a cool tropical drink. If you're not looking to hire a bartender, consider mixing a themed cocktail and serve out of a drink dispenser.

### 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

