

The Complete Client Party CHECKLIST

The seasons are changing and kids are back to school, but that doesn't mean the fun has to end. Plan a fall-themed client appreciation party to connect with your A+ clients and thank them for their referrals.

Easy & Fun Party Ideas

Scent-sational Soiree

Host a candle-making party – either in-person or virtually – for your top clients. Provide the instructions and supplies for each guest, along with autumn-inspired candle dye colors and fragrance oils. While the candles are solidifying, serve appetizers and have your guests design custom labels for their creations.



Coffee Pick-Me-Up

Help your clients through the early morning drop-offs and first few weeks of the school year with a back-to-school coffee day at a local cafe. Invite the parents in your database and any local teachers to stop by for a free beverage and pastry on you, and hand out colorful school supplies as take-home gifts for the kids.



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

* 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.