

THE COMPLETE Client Party Checklist

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.

As the spooky season looms closer and we all become captivated by the Halloween spirit, treat your A+ clients to an eerie and frightfully fun client appreciation party to thank them for their referrals.

EASY & FUN Party Ideas

BOOS & BOOGIE

Gather your best clients for a haunting costume party and a chance to win a prize. Have a panel of judges ready or include your guests in the fun by asking them to cast their vote for a favorite. Top off the night with appetizers, refreshments and goodies to satisfy their sweet tooth.

JACK-O-LANTERN JUBILEE

Kick off the Halloween season with a pumpkin carving party. Prepare pumpkins and carving kits for each guest attending, and don't forget buckets for the seeds. Looking for a no-carve pumpkin idea? Skip the messy scooping and offer creative ways to decorate their pumpkin instead.

* 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