



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 we enter the season of gratitude, it's important to take note of the people and things for which we are thankful. Even more important is to let those folks know! Hosting a client appreciation event can show your clients how grateful you are for them and their referrals.



EASY & FUN PARTY IDEAS

VIRTUAL BAKING CLASS

Nothing says autumn like the smell of fresh baked goods. Bring that aroma into your clients' homes with a virtual baking class. Pick a recipe that is both beginner-friendly and has seasonal ingredients—think pumpkin coffee cake, apple cider donuts, etc. Email the recipe card ahead of time and drop off the ingredients to your clients the day of the class.

FRIENDSGIVING

What better way to show your clients you care than with really good food! Gather your A+ clients for a delicious meal, festive beverages and of course friends. Dinner can consist of the traditional holiday dishes or another theme. Plan to have ice-breaker games ready to keep the conversation going.

* 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