

THE COMPLETE Client Party CHECKLIST

'Tis the season for a holly jolly get-together with your top clients. With a little bit of preparation and this helpful checklist, you can plan a fun and memorable event to show your appreciation for your A+ relationships and their referrals!

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.

Let it Snow Sweets!



Host an all-white desserts & champagne happy hour for your top clients. Keep the portion sizes small, so, guests can sample a variety of the delicious treats and vote for their favorite at the end of the event. Don't forget to-go bags so your clients can take some home!



After the Party:

EASY & FUN

Party Ideas

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

Breakfast with Santa



It's time for a morning full of holiday cheer! Instead of having to wait in line to visit Ol' Saint Nick, host a Breakfast with Santa for your clients and their families. Hire Santa Claus to join you for breakfast with festive music and have the kids write letters to give to him.

- Send a personal note to all attendees
- Send a personal note to your guests who didn't attend the party
- Update your database