

The Complete Client Party CHECKLIST

This month, celebrate the longer days ahead and your A+ clients with a client appreciation party. This event checklist will help guide you through the planning process, making your next party a breeze.

FUN & EASY Event Ideas

WELCOME SUMMER BONFIRE

Gather your top clients around the fire to celebrate the beginning of 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.

MIDSUMMER CELEBRATION

Treat your clients to a summer celebration with light summer dishes, music and dancing! Have fun with the décor by including flowers, candles and bubbles to capture the whimsical spirit of the season. Flower crowns are a Midsummer staple. Get your guests involved with a DIY flower crown station where they can create their own floral headpiece to wear and to keep as a party favor.

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.
- Reserve the location or book any services needed.
- Call to invite your guests.
- Mail or email your invitations.

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.
- 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 are not being catered.

DAY OF THE PARTY

- Get to your location early to set up.
- Meet the vendors and get them situated.
- Greet each guest as they arrive.
- Thank your guests for coming to the party, as well as for their business and referrals.

AFTER THE PARTY

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

