

THE COMPLETE

Client Party checklist

Celebrate the end of summer and your A+ clients with a Client Appreciation Party. Use this handy checklist to help you plan your next event.

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.

FUN & EASY EVENT IDEAS

COASTAL SOCIAL

What better way to bid farewell to summer than with a coastal-themed party? Decorate your space with beach decor (think shells, rocks and driftwood) and fresh coastal colors. Keep the menu simple with a backyard BBQ and send your guests off with a personal note in a bottle.

PICNIC PARTY

Picnics are a great way to get outdoors and enjoy the fresh air. Pick a local park and lay out some blankets and pillows to provide comfortable seating. Sandwiches, pasta salad and fresh fruit are easy to serve and family friendly. Provide a few lawn games to encourage your guests to mix and mingle.