

# THE COMPLETE CLIENT PARTY CHECKLIST

Client parties are fun and festive ways to connect with your clients. With a little bit of preparation, you can plan a fun and memorable client party that's sure to get your clients talking. Planning your next client party is a breeze with this handy checklist.

## 2 MONTHS BEFORE THE PARTY

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|---|---|
| Set your budget <input type="checkbox"/>  | Choose a theme <input type="checkbox"/>   |
| Set a date <input type="checkbox"/>   | Create your guest list, including top clients as well as the vendors you work with the most, such as lenders, attorneys, home inspectors, etc. <input type="checkbox"/> |
| Reserve services: venue, caterer, photographer, DJ or live musicians <input type="checkbox"/> |   |
| Send Save the Date cards <input type="checkbox"/>   |   |

## 1 MONTH BEFORE THE PARTY

- |   |   |
|---|---|
| Call to invite your guests <input type="checkbox"/>             | Mail or email your invitations <input type="checkbox"/> |
| Purchase party favors and raffle items <input type="checkbox"/> |   |

## 2 WEEKS BEFORE THE PARTY

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|---|---|
| Check in with the invited guests who haven't yet responded <input type="checkbox"/> | Call to confirm attendance <input type="checkbox"/> |
|---|---|

## 1 WEEK BEFORE THE PARTY

- |   |  |
|---|--|
| Send out email reminders <input type="checkbox"/>         | Confirm the menu with the caterer <input type="checkbox"/> |
| Touch base with the photographer <input type="checkbox"/> | Purchase decorations <input type="checkbox"/>              |
| Create a music list <input type="checkbox"/>              | Assemble favors & raffle items <input type="checkbox"/>    |

## 1 TO 2 DAYS BEFORE THE PARTY

- Stock up on drinks, snacks & food that's not being catered

## THE DAY OF THE PARTY

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|---|--|
| Get to the venue early to set up <input type="checkbox"/>     | Greet each guest as they arrive <input type="checkbox"/>   |
| Meet the vendors & get them situated <input type="checkbox"/> | Thank your guests for coming to the party, as well as for their business & referrals. <input type="checkbox"/> |

## AFTER THE PARTY

- |  |  |
|--|--|
| Send a personal note to all attendees <input type="checkbox"/> | Send a personal note to your guests who didn't attend the party <input type="checkbox"/> |
| Update your database <input type="checkbox"/>                  |  |

Keep in mind that the timeline may change depending on the time of year. For example, if you're planning a holiday party, it's often better to start planning three or four months in advance. Venues, caterers, photographers and your clients' busy schedules fill up fast around the holidays; by planning early, you can help to ensure that you're able to plan the party you want.