

CLIENT RELATIONSHIPS

Client Appreciation Planner

A December thank-you for your clients, planned from November: the format, the guest list, the timeline and the follow-up.

A client appreciation event is the one time a year your past clients, your referral partners and the people who sent you business are in the same room, and none of them is being sold anything. Done well, it is the warmest touch in your whole calendar. Done in a rush, it is an expense nobody remembers. The difference is almost entirely in the planning, and the planning starts about six weeks out.

Pick the date before anything else.

December weekends fill quickly — for venues, caterers and your clients' own calendars. A date chosen in early November gets a full room; a date chosen after Thanksgiving competes with every office party in the Valley. Everything else in this planner counts back from that one date.

Choose the format

Pick the one that fits your clients, not the one that looks best on social media. A room full of young families wants something different from a list of retirees and investors.

FORMAT	WHAT IT IS	BEST FOR	EFFORT
Drop-in open house	Two or three hours at your office or a rented space. Food, drinks, come and go.	Any list. The easiest to host and to attend.	Low
Holiday treat pickup	Clients stop by a set window to collect a pie, cookies or a small gift, and chat.	Busy clients who will not stay for a party.	Low
Family event	Photos with Santa, cookie decorating, a craft table for the kids.	Buyers with young children. Builds the strongest memories.	Medium
Group outing	A reserved block at a holiday lights night, a private movie screening, a game.	A smaller, closer list you want to spend real time with.	Medium to high

Whatever you choose, make it easy to say yes to: a weekend afternoon, somewhere central, kids welcome unless it is clearly an adults' evening, and an end time on the invitation so nobody worries about getting stuck.

The timeline, week by week

☐ 01 Six weeks out: set the date and book it

Choose the date and the format, then book the venue and any vendor you cannot do without — a caterer, a photographer, a Santa. Get the booking in writing with the cancellation terms.

☐ **02 Five weeks out: build the guest list**

Pull everyone who belongs in the first two tiers below, check the contact details are current, and decide on plus-ones and children. Aim to invite more than you can seat: expect a good share of people to decline.

☐ **03 Four weeks out: send the invitations**

Email or text a save-the-date with the date, time, place and a simple way to reply. A printed card on top is a nice touch for your top tier. Ask for replies by a set date so you can plan food.

☐ **04 Three weeks out: order what you need**

Food and drink, favors, name tags, decorations, a sign-in sheet or QR code. If you are offering photos, choose the spot and the backdrop now, not on the day.

☐ **05 Two weeks out: send a reminder**

A short reminder to everyone invited, and a personal call or text to your top-tier guests who have not replied yet. A personal ask turns a maybe into a yes more often than a second email does.

☐ **06 One week out: confirm everything**

Confirm the headcount with your caterer and the timings with every vendor. Print the guest list. Decide who on your team greets people at the door and who looks after the food.

☐ **07 The day before: set up**

Set up whatever you can in advance, test the sign-in QR code, and write down the few things you want to say in your welcome so you keep it under two minutes.

☐ **08 On the day: host, don't sell**

Greet everyone by name at the door, introduce people to each other, take photos with permission, and collect updated contact details and birthdays on the sign-in. No listing talk unless a guest brings it up.

☐ **09 Within two days: say thank you**

Send every guest a thank-you, with a photo of them if you took one. For the people who could not come, drop off or mail the favor they missed, with a note.

☐ **10 Within a week: update your CRM**

Log who came, update every detail you collected, and note anything guests mentioned — a new baby, a move coming up, a kitchen remodel. Those notes are the reason the event paid for itself.

Who to invite first

- Tier one: everyone who closed with you this year, and everyone who sent you a referral. These are the people the event is really for.
- Tier two: past clients from earlier years, starting with the ones you have not spoken to in a while. An invitation is an easy, warm reason to get back in touch.
- Tier three: your core partners — your lender, title officer, inspector and the other vendors you rely on. They send business too, and they bring energy to a room.
- Tier four: your wider sphere, if there is space. Friends and neighbors who have never transacted with you still talk about you to people who will.

What to budget for

- The venue, unless you host at your office or a client's clubhouse.
- Food and drink — usually the biggest line. Order for the replies you have, not the full invitation list.
- Favors or a small take-home gift, plus a few extra for the people who could not come.
- Invitations, name tags, decorations and a printed sign-in sheet.
- A photographer or a simple photo backdrop, if you want pictures worth sending afterward.
- Ask your lender and title partners whether they would like to co-host. Check with your broker on what is allowed before you agree to anything.

It is not a lead event.

The moment an appreciation event turns into a pitch, it stops being appreciation. Nobody should leave with a flyer. The business comes later, from the relationships the day kept warm — and from the notes you put in your CRM the week after.



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