

Organizing a memorable holiday party for your clients is a fantastic way to show appreciation, strengthen relationships, and generate referrals.

Focus on making the event about your clients, not sales; the goal is to build lasting relationships and show genuine gratitude. Here's a comprehensive checklist tailored for a real estate professional to ensure your party is organized, memorable, and reflective of your Texas hospitality.

Client Party Checklist FOR THE HOLIDAYS

❑ INITIAL PLANNING

Set the Date & Time: Choose a date that avoids major holidays and common travel periods.

Determine Budget: Finalize your spending limit for venue, food, gifts, and entertainment.

Select Venue: Decide between your office, a client's home, a local event space, or an outdoor Texas-friendly venue.

❑ THEME & INVITATIONS

Pick a Theme: Different ideas might include Texas winter wonderland, ugly sweater, holiday fiesta, or classic elegance.

Create a Guest List: Include past and current clients, referral partners, and their families.

Send Invitations: Use digital invites, mailed cards, or phone calls. Ask for RSVPs to get an accurate headcount.

❑ FOOD & BEVERAGES

Arrange Catering or Potluck: Decide between professional catering, a potluck, or food stations (think BBQ, Tex-Mex, or dessert bake-off).

Drinks: Offer a signature holiday cocktail, beer, wine, and non-alcoholic options. Consider drink coupons to control costs.

❑ DECORATIONS & ATMOSPHERE

Festive Décor: Use holiday linens, candles, centerpieces, and Texas-themed accents to set the mood.

Music & Lighting: Arrange for live music, a DJ, or a curated playlist. Ensure proper lighting for ambiance and photos.

❑ ENTERTAINMENT & ACTIVITIES

Games & Contests: Ideas include ugly sweater contest, holiday trivia, gingerbread house decorating, or a dessert bake-off.

Photo Booth or Photographer: Capture memories and provide guests with keepsakes.

Kids' Activities: Crafts, cookie decorating, face painting, or a visit from Santa or the Grinch.

❑ GIFTS & GIVEAWAYS

Client Appreciation Gifts: Personalized ornaments, local treats, or branded swag. [Here are several ideas.](#)

Raffle Prizes: Include fun or useful items, and announce winners during the event.

❑ LOGISTICS

Check-in Process: Set up a welcome table for name tags and gifts.

Staffing & Volunteers: Assign roles for setup, guest check-in, activity supervision, and cleanup

Vendor Coordination: Confirm all bookings (caterers, entertainers, rentals) at least a week in advance.

❑ SAFETY & COMFORT

Transportation: Offer ride-share codes or arrange a shuttle for guests if alcohol is served

Weather Plan: Have a contingency plan for outdoor events in case of bad weather.

Follow up ideas ➡



Post-Party Follow-Up

Effective follow-up after your holiday client appreciation party is crucial for deepening relationships and generating future business. Here are proven strategies tailored for real estate agents to reinforce positive feelings from your event, help you stand out as a thoughtful agent, and set the stage for future business and referrals.

Send Personalized Thank-You Notes: Within a few days of the event, mail or handwrite thank-you notes to each attendee. This personal touch is highly valued and shows genuine appreciation for their time and support. Mention specific conversations or shared moments from the party to make your message memorable.

Follow Up with a Phone Call: Call attendees to thank them again and reference any personal topics discussed at the event (e.g., a hobby or family update). This reinforces your relationship and keeps you top of mind for future real estate needs.

Distribute Feedback Surveys: Email a brief survey the day after the event to gather insights on what your clients enjoyed and what could be improved. This demonstrates your commitment to their satisfaction and helps you plan even better events in the future.

Offer Exclusive Post-Event Promotions: Provide special deals, service upgrades, or exclusive invitations to future events as a token of gratitude. This can incentivize continued engagement and reinforce the value of your relationship.

Share Event Highlights: With permission, post photos or highlights from the party on your social media or in your newsletter. Publicly recognize clients and thank them for attending, which can boost their visibility and foster community.

Send Thoughtful Gifts: Consider sending a small, practical gift—such as a personalized ornament, branded item, or local treat—to select clients as a follow-up gesture. Tailor gifts to client interests for added impact.

Maintain Regular Communication: Add attendees to your ongoing communication channels, such as newsletters or birthday card lists, to ensure the relationship continues beyond the event.

Track Referrals and Engagement: Monitor which clients brought guests or referrals, and follow up with both the referring client and the new contact. Acknowledge and thank clients for referrals, and offer to provide the same excellent service to their friends or family.

Use SMS for Personal Touch: For clients who prefer text communication, send a personalized SMS follow-up. This can stand out in the crowded holiday inbox and feels more direct and authentic.



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