

# 1

## CLIENT PARTY PLANNER

### Prep Module Plan of Action

Purpose: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### Goals:

- 1 \_\_\_\_\_  
\_\_\_\_\_
- 2 \_\_\_\_\_  
\_\_\_\_\_
- 3 \_\_\_\_\_  
\_\_\_\_\_

Budget:

\$

# of Guests Attending (plan on 80% showing): \_\_\_\_\_

Location: \_\_\_\_\_

Theme: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Menu: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# 2

## CLIENT PARTY PLANNER

### Weekly Action Steps

#### ADDITIONAL ACTIVITIES

#### WEEK 1 HITTING A HOME RUN WITH THE FUNDAMENTALS

- ☐ Contact venue, caterer, entertainment, etc. to secure a date.

- ☐ Select and purchase your invitations.

#### WEEK 2 POPPING BY WITH A DOSE OF SUNSHINE

- ☐ Send out invitations.

- ☐ Make lists of items to rent or borrow: chairs, tables, music system, speakers, table cloths, décor, etc.
- ☐ Creating your own decorations? List what you need, buy and set aside 1-2 days to make them. Enlist help.

#### WEEK 3 CUTTING THE CORD ON CALLS

- ☐ Call through your database to follow up on the invite.

- ☐ Hire a photographer or enlist a friend to help take pictures of the event. They're great to use in a follow-up newsletter to show how much fun the event was. Frame pictures of you with your clients to use as a follow-up Pop-By!
- ☐ Decide on the menu.

#### WEEK 4 STAYING ON THE REFERRAL TRAIN

- ☐ Call your top business-to-business relationships about sponsoring your party.

- ☐ Confirm audio or video equipment to ensure it is in proper working order.
- ☐ Write out what you'd like to say to thank your party guests and practice.
- ☐ Plan timetable for any pre-party cooking.
- ☐ Plan activities and favors; buy non-perishables.

#### WEEK 5 BREWING UP REFERRALS

- ☐ Call to confirm all RSVPs and send a reminder email to those you've not heard from yet.

- ☐ Create music playlist.
- ☐ Make any food ahead of time that can be frozen.
- ☐ Buy all drinks.

#### WEEK 6 BUSINESS OVER BREAKFAST

- ☐ Finalize headcount and confirm with vendors/entertainment. Host this week.

- ☐ Buy flowers and/or perishable food items. Prep any food items ahead that will keep.
- ☐ Review your party activities.
- ☐ Practice your thank you message to guests.
- ☐ Decorate.



# 3

## CLIENT PARTY PLANNER

### Budget/Spending Plan

Pre-Event	Projected	Actual
Invitations	\$	\$
Postage	\$	\$
Decorations	\$	\$
– Table linens		
– Balloons		
– Floral		
– Centerpieces		
– Tableware/Servingware		
Gifts	\$	\$
Entertainment	\$	\$
Location Fees	\$	\$
Game Supplies	\$	\$
Caterer	\$	\$
Photographer	\$	\$
Rentals (chairs, tables, music system, etc.)	\$	\$
Miscellaneous	\$	\$
<b>Total for Pre-Event</b>	\$	\$
Event	Projected	Actual
Appetizers	\$	\$
Beverages	\$	\$
Food	\$	\$
Desserts	\$	\$
Miscellaneous	\$	\$
<b>Total for Event</b>	\$	\$
Post-Event	Projected	Actual
Clean Up	\$	\$
Thank You Notes	\$	\$
Postage	\$	\$
Miscellaneous	\$	\$
<b>Total for Post-Event</b>	\$	\$
<b>TOTAL BUDGET</b>	\$	\$



# 4

## CLIENT PARTY PLANNER

### The 4 Types of Parties

#### SMALL

- Your home
- Dinner at a restaurant
- Mini golf
- Casino night
- A+ only

#### MEDIUM

- Bowling
- Movie theater
- Country western
- Ice cream social
- Reverse pop-by

#### LARGE

- Zoo
- Pumpkin patch
- Valentine's day
- Event on the lake

#### BUSINESS-TO-BUSINESS

- Miscellaneous get-togethers

