

Real Estate Party Planning Checklist

10 Steps for Hosting a Real Estate Event

1. Identify The Reason For The Real Estate Event

Types of community events:

- Community event
- Promoting a new listing(s)
- Charity
- Business or referral partnership
- Holiday
- Client appreciation
- Educational
- Other: _____

2. Decide Who to Invite

Create the invite list:

- Past clients
- Current client
- Prospective leads
- Referral partners
- Community leaders & business owners
- Colleagues
- Friends
- Family/loved ones

3. Create a Budget for the Event

Use the Event Budget Spreadsheet or calculate below:

- Total Budget and/or Not to Exceed: \$ _____
- Event space: \$ _____
- Food/drink: \$ _____
- Supplies (tableware, napkins, etc.) \$ _____
- Favors/gifts: \$ _____
- Site staff: \$ _____
- Equipment: \$ _____
- Tables/Chairs: \$ _____
- Decor: \$ _____
- Performers/Speakers: \$ _____
- Marketing/Advertising: \$ _____
- Workbooks or office supplies: \$ _____
- Other: \$ _____

4. Select an Event Location

- Visit locations
- Sign contracts (if applicable)
- Finalize location

5. Create & Send Event Invites

- Design invites
- Date of event and time/time range (e.g., from 6-8 p.m.)
- RSVP information
- Who to contact (phone and/or email)
- Address and phone number of venue
- Reason for event
- Incentive to attend
- Ability to bring others with them
- Branding (logo, headshot, brokerage name/address/ phone)
- Send invites
- Email
- Mail
- In-person

6. Automate Event Marketing Messages & Record RSVPs

Market event:

- Social media
- Email
- Mail
- In-person

RSVPs:

- Weekly email (such as for a large event or webinar promoted for 1-2 months or more)
- Tentative headcount to confirm food/beverage order, room setup, and so on, 1 week before the event at the latest
- Confirm headcount, notify vendors, cutoff RSVPs
- Send a reminder email 1-2 days before the event
- Day of event email: resend important details (time, address, incentive to attend)

7. Hire Vendors

- Food
- Beverage
- Bartenders and servers
- Photographer/Videographer
- Security/door attendants
- Clean up crew
- Other: _____

8. Give Out Party Favors and Branded Materials

Favors/Gifts:

- Design and confirm pricing
- Purchase party favor

Branded materials:

- Signs
- Napkins
- Business cards
- Flyers
- Brochures
- Other: _____

9. Make Real Estate Event Follow-Ups

- Thank you sent to attendees
- Personalized emails to select attendees
- Emails to non-attendees
- Move contacts into lead nurturing lists

10. Post-Event: Share Photos, Videos, & Shoutouts on Social Media

- LinkedIn
- Twitter
- Instagram
- Facebook
- Tiktok
- Snapchat
- Other: _____