

IDEAS FOR YOUR NEXT CLIENT EVENT

by Gary Shilman, Key Accounts Manager, BTS Asset Management, Inc.



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Find Opportunity



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Client events can be a fun way to thank your clients for their trust in you. They are also a way to build stronger relationships, be a source of referrals, and build name recognition.

We have put together this guide loaded with many ideas to help you select client events that best fit your practice and clients. Also included are ideas that are well suited for virtual events, which may be particularly useful today but can continue to be fun options far in the future, especially for clients that are not local.

Whether you're an expert in client events or looking to host one for the first time, this guide should help you select new, fun ideas to keep your clients engaged and thank them for making you a part of their financial future.

Selecting a client event or two is just the first step. Once selected, we outline the steps necessary to make your client event a great success. Here's a couple of things to keep in mind from the outset. Everyone likes to eat, so order lunch or dinner based on the event. Meals can be family style buffet or boxed, again depending on the event, or simple as pizza. If at a restaurant with alcohol as part of the event, we suggest giving your clients two tickets for alcohol, to control your budget and alcohol consumption.

Be proactive about having clients invite one of their friends. It may be obvious why you want them to invite a friend, but the event is still a great thank-you for your clients and can provide a fun event for their friend without any obligations.



The list presented is in no particular order (with virtual options listed first) and certain events may be better suited depending on where you reside or the clients that you have. In additions, some events can be tied to or held on certain "National" days. Also, not all events have to be for every client, you can craft dedicated events that are geared for clients with specific interests or for the top 20% of your clients.

Beer Tasting (*Virtual Option*) – This can be done year-round, but even better for Oktoberfest. There are a couple of ways to do this in person. Today there are local microbreweries everywhere, a lot of them large enough to host events at the brewery, many with food. Another option is to work with a larger local liquor store to host the beer tasting at your office, with a store provided beer expert. A virtual option is great as you can include clients that are not local. There are companies online that will ship beer to your clients, and then host a beer tasting via video conference with a cicerone, or trained beer expert.

Wine and Cheese Tasting (Virtual Option) – Host a wine and cheese tasting at your office or a local venue. Inquire with some larger and local liquor stores in your area about having one of their wine experts handle the wine tasting. Some larger shops may have a cheese expert, as well. If not find a local cheese shop that can provide the cheese, crackers, some hors d'oeuvres, and a fromager (cheese expert). There are virtual options available that can ship everything to your clients.

Painting Class (Virtual Option) – Painting classes are a popular activity. Typically this is a 2 hour event. Clients get to have fun painting and have something to take home with them afterwards. Most painting classes have wine, beer, and hors d'oeuvres for guests, or you can have that brought in by a caterer. This is a great virtual option. Studios host a virtual class, and supplies can either be picked up at the painting studio location or mailed to your clients. We suggest having supplies mailed to your clients, and this is a way to then include clients that are not local.

Cooking Demo (Virtual Option) – Hire a chef to have a cooking demonstration. This can be done at your house if you have the space and layout, a restaurant that can host demos, or even a specialty retail store that does cooking demos. There are numerous online companies that can both host the cooking demo and send the necessary ingredients to your clients.

Sushi Rolling (Virtual Option) – Similar to the cooking demo, but this time with Sushi. If we had to guess, most of your clients have never prepared sushi, even though they may eat sushi all the time. This can be a fun and unique way to entertain and feed your clients at the same time. There are several online companies that can both host the sushi rolling demo and send the necessary ingredients to your clients.

Bartending Demo (Virtual Option) – Hire a professional bartender to teach how to make various drinks. A Flair Bartender can put on a show with their bottles and shakers while teaching your clients how to mix some great drinks.

Book Swap (Virtual Option) – Reading is a favorite pastime for many people. Organize a book swap at your office or another location. Encourage people to bring 2-3 books along with 2-3 friends. As another take away for clients, consider giving them a Dr. Seuss book to give to their grandkids. The virtual option would invite your clients to drop off 2-3 books to your office (ask that they include a note to let you know who dropped them off), have an assistant type up a list of the books now available and email it to all the clients that dropped off books requesting that they select 2 books and email you back, then mail the requested books to your clients. Media mail is an inexpensive way to ship books and you can typically fit 2 books in a large envelope. Any leftover books you can donate to your local library.

Magic Show (Virtual Option) – Hire a magician for a lunch event at your office or another venue. Great family event geared for clients and guests of all ages. As a virtual option, there are many magicians that are now doing virtual magic shows.

March Madness – NCAA Basketball Tournament – Whether your clients are huge college basketball fans or not, March Madness goes beyond the die-hard college hoops fan. Watching sports in a crowd often makes the games more enjoyable and gives you the opportunity to mingle throughout the game. Rent a sports bar or restaurant, or a portion of the restaurant, for your client event. Another option would be to rent a function hall that has a large tv or rent one for the event.

Nature Clean Up – If you live in an area that has a lot of hiking trails, beaches, or other nature areas, organize a half day to clean up a popular recreation area. Make sure to provide gloves and trash bags. Order lunch afterwards if you want to do this in the morning, or lunch beforehand if you do an afternoon event. Dinner is always an option after an afternoon event.

Pet Day – Likely the majority of your clients have pets, particularly dogs. While we don't want to discriminate against cats, this event would be much better suited for dogs. Not only can this be a useful and fun way to get clients together, but a way for their non-human loved ones to have some fun too.

Hire a pet groomer, nail cutter, and trainer so that your clients can utilize all or some of these services during the event. We recommend having doggie treats for this event and possibly a pet toy to take home.

Cinco de Mayo – If this is a day that you like to celebrate or have a large client base for whom this is a big day, throw a Cinco de Mayo party. Rent out a portion or entire Mexican restaurant. If the restaurant doesn't provide it and there is space, purchase a pinata if kids are invited.

Bike Ride – If you enjoy biking, not the leisurely kind, and have several or more clients that are bicycling enthusiasts, organize a bike ride. This can be a good way for fellow clients to meet each other that have similar interests. This is also an opportunity to learn more about your clients' interests if they respond to this invitation. Try to choose a route where you can stop at a restaurant that can accommodate a bunch of people in riding gear.

Kentucky Derby, Horse Racing – Host a party at a local racetrack or at a restaurant for the Kentucky Derby. While the Kentucky Derby race starts at 7:00 PM, the days events start at 11:00 AM with live coverage generally starting at 2:30. This can be a late afternoon event with great food and specialty drinks. With time between races, plenty of opportunity to mingle with your clients and guests.

Minor League Baseball Game – Enjoy one of America's favorite pastimes. If you live near a minor league baseball team, whether it's AAA, AA, A classifications, have your client event at one of their games. Most minor league stadiums have function rooms where you can watch the game, eat food, and have drinks. Great way to have everything included together, a venue, entertainment, food, and drinks which also helps support young athletes.

Mother's Day – Host a Mother's Day lunch at a local restaurant. Give each mom a bouquet of flowers or a box of chocolates to take home.

Father's Day – Host a Father's Day lunch at a local restaurant. Give each dad a six-pack of beer or a baseball cap or golf shirt with your logo on it.

Fourth of July – Celebrate America by hosting a Fourth of July party. This is a great family event. Hire a professional to run a fireworks show depending on which state you live in. Bring some yard games such as cornhole, ladderball, kanjam, and horseshoes. This is great to combine with a BBQ.

Golf Outing – If you play golf, what better way to spend 4-5 hours with some of your best clients. This can be a regular way to entertain clients and be a source for referrals. Easy way for a client to invite two guests. Most golf courses have a restaurant on site for lunch or dinner after golf. Consider giving each guest a sleeve of golf balls with your company's name on it.

Picnic – Host a picnic at a park. Can rent a bounce house for kids with BBQ or pizza for food. Bring some yard games such as cornhole, ladderball, kanjam, and horseshoes. Consider giving each client and guest a picnic blanket with your logo on it. Check with your local town if a permit or fee is required for large gatherings.

Dinner at Your House – Invite a top client and ask that they bring another friend or couple. Hire a chef for the evening to prepare and serve the meals so you can spend time with your guests. This is something that can be done on a monthly or quarterly basis.

Ice Cream Outing – Who doesn't love ice cream? Hire 3-4 local ice cream shops to serve ice cream to your clients. Great way to get the client's whole family out. Consider giving each client and their guest an ice-cream scoop with your logo on it.

Valentine's Day Lunch – What better way to get a lifelong client than possibly finding them the love of their life. Have clients invite a single friend. This can be for both younger clients but also for older clients that are divorced or widowed. If you have some shy guests, introduce existing clients to one another so their guests will start talking to one another.

Movie Night at a Theatre – Rent out an entire movie screen midweek or a weekend morning/early afternoon and have food, popcorn, candy, and sodas available for your guests. Pick a PG movie so clients can bring their entire family and invite another guest family. As movie theatres have shrunk capacity with larger seats, make sure to pick the right size theatre. Discuss with the theatre manager having an hour before and after the movie to be able to socialize with your clients and most theatres should be able to have your company name on the screen before and after the movie.

Document Shredding Event – Who would have thought there is still so much paper with email and digital files now being mainstream for over 20 years. However, most people are still inundated with paper, much of it with personal information. Hire a paper shredding company that has giant paper-shredding machines that shred on site. This could be a good event to do before or after tax season as clients are often putting together financial statements at that time of the year and going through their files. Consider ordering a nice letter opener with your firm logo to help clients open future snail mail.

Santa Clause at your office – During the holidays malls are jam packed and lines can be long for photos with Santa. Hire your own Santa for several hours at your office along with a photographer. Good opportunity both for clients to bring their young kids or for older clients to bring their adult kids and grandchildren. Consider having a small gift for the kids.

Car Wash – Host a car washing event at a local car wash. Give your clients a goodie bag of car related accessories as they exit the car wash, with items such as a magnetic phone holder for the car with your logo, an emergency flashlight/seatbelt/window tool, and umbrella.

Car Show – Depending on your clientele and their interests, host a car show where you and your clients bring their vintage or antique cars, either at your office parking lot if there is space, or at a restaurant that has enough parking space that can host this type of event. Consider having a vote and trophy for top three favorite cars.

Christmas Trees – Buy 50 trees to be delivered to your office and invite your clients over to pick out a tree. Order a few different sizes so clients can pick one that fits their space.



Now that you have chosen some events, organizing them is the next critical step to pull off a successful event. You do not need to do this by yourself. Have office staff or junior advisors help with the following step-by-step details.

- Select the location for your event. Depending on the event this may be your office, a local restaurant, or event space. Likely you will need to contact a few restaurants to determine availability and what they can offer for space that meets your needs.
- Depending on the event, hire the experts that you need for your event.
- Determine if the event is geared for all your clients or some of your clients and create the client list. Figure that each client will bring 1 or 2 guests depending on the type of event.
- Send invitations out by email using a template or service provider. There is a good chance that your CRM system may have templates available for event invitations. In most cases, make sure to note in the invitation that clients must RSVP, including the number of guests, so that you can plan accordingly.
- If you will be giving out gifts, order the gifts. Add your company logo and information to those gifts that can be custom labeled.
- Two days before the event, send a reminder email about the event with a note about looking forward to seeing them and their guests.
- Two days before the event, confirm with all service providers that they are all set for the event. This should be done for the restaurant, any food providers if not at a restaurant, entertainment, and anyone else you are relying on to be at the event.
- For events at your office, make sure to clean up the office area, restrooms, and any other areas clients and guests will see.
- Day after event, send a thank you email to your clients that attended, adding a request for a follow up call if you didn't get a chance to speak with them for a significant period of time during the event. Follow up with guests if they gave you a business card are requested that they contact you.
- Start planning for the next successful event!

