

PixelMentor

EVENT PLANNING GUIDE FOR REALTORS



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Plan Amazing Events

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Pixel Mentor Event Planning Guide

At your brokerage, hosting events is more than just a business strategy - it's an opportunity to embody expertise, community and giving back. We want to create events that not only showcase your brand and build relationships with your clients but also make a positive impact on your community. While a goal of hosting 50 events per year is ideal, also understand that the quality of the events is more important than the quantity.

So, what types of events can we host that will truly make a difference in people's lives? How can you leverage Bank Holidays/Major Holidays and weekends to maximize your impact and reach? What unique perspectives and experiences can you bring to the table to create events that truly reflect your brand and values?

As the person responsible for planning these events, these are the types of questions you should be asking yourself. We want to work with you to create events that are meaningful, engaging, and impactful - events that embody your goal of helping clients and establishing yourself as a local expert. Let's put your creativity and passion to work and make a difference in your community through these events.

To accomplish your ambitious goals for event planning, we recommend using this party planning guide that can help you stay organized, focused, and creative throughout the planning process. This guide includes a detailed checklist of tasks that need to be completed, a budget breakdown to ensure you stay within your financial means, and a timeline of milestones to help you track your progress. Additionally, you can leverage this guide to brainstorm creative ideas for events that align with your brand and values, as well as strategies for promoting the events and measuring their success.

By following this party planning guide, we can ensure that each event is carefully planned and executed, resulting in a memorable experience that leaves a positive impression on your clients and community.

So let's get started on this exciting journey of event planning, and let's use this guide to make it a success!

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4 Recommended Real Estate Party Styles

Pixel Mentor recommends four different party styles that are ideal for hosting successful events. The first style is **Cocktail Style**, which is perfect for gatherings of 15-20 people. This style is characterized by standing room only, where guests can mingle and network over drinks and hors d'oeuvres. The second style is **Circle of Influence Gathering**, which is ideal for gatherings of 25-50 people. This style focuses on building connections and fostering relationships between guests who share similar interests. The third style is **Client Appreciation Event**, which is perfect for gatherings of 50-100 people. As the name suggests, this style is focused on showing appreciation to clients and building strong relationships with them. Finally, the **Community Event** style is ideal for gatherings of 100 or more people. This style focuses on bringing the community together, creating a sense of unity and belonging, and showcasing the values and mission of your brokerage. From the perspective of the person planning the event, it is important to choose the right style that fits the occasion, the number of guests, and the overall goal of the event, whether it is networking, relationship building, or community engagement.

Cocktail Style (15-20 people)

Planning a cocktail-style event for 15-20 people can be an intimate and enjoyable experience. Here are some helpful tips from Pixel Mentor for sales representatives to plan a successful event:

- Invite 20% more people than your space can accommodate since only 70-80% of invitees typically attend.
- Use the NICK formula for a successful party:
 - N: Provide name tags for guests to wear
 - I: Plan at least two icebreakers to help guests connect with one another
 - C: Serve only cocktails (both alcoholic and non-alcoholic) and appetizers
 - K: Make sure to kick guests out at the end of the event to avoid overstaying
- Choose a theme if you want to add some fun and creativity to the event.
- Use rental china and silverware or your own to create an elegant atmosphere
- Keep it simple but intimate to create a memorable event for your guests.

By following these simple tips, you can plan a successful cocktail-style event that your guests will love!



Circle of Influence Gathering (25-50 people)

Are you ready to plan an amazing Circle of Influence Gathering for 25-50 people? We've got some helpful tips to ensure your event is a huge success!

- First things first, set a budget to cover all necessary expenses, such as venue rental, food and drink costs, and any additional expenses that may arise. Pick a spacious venue with great seating, lighting, and sound systems to ensure your guests have a comfortable and safe experience.
- Food and drinks are essential, so choose a caterer that offers a variety of options to meet dietary requirements and preferences. To keep your guests entertained, think about adding some fun activities, like live music or games, to make the event unforgettable.
- Clear communication is key! Make sure your guests know all the details, including the event schedule and directions to the venue. Be available to answer any questions or concerns.
- Want to add some pizzazz? Consider picking a theme that fits the occasion. And if you're worried about tableware, rental dinnerware and silverware are a practical and cost-effective option.

By following these tips, you'll create a memorable event that your guests will love. Get ready for a night to remember!



Client Appreciation Event (50-100)

Are you considering hosting a Client Appreciation Event with 50-100 guests? Here are some tips from Pixel Mentor to help you make it a success:

- Choose a venue that can accommodate everyone comfortably, with adequate seating, lighting, sound systems, and climate control.
- Hire a catering company that can provide a variety of food options to meet dietary needs, and consider any necessary technology requirements.
- Ensure you have enough staff to keep everything running smoothly, and have a clear communication plan in place for guests.
- Make sure there is adequate parking, seating arrangements, security, and an emergency plan in case of unforeseen events.
- Lastly, use compostable dinnerware to keep things eco-friendly.

Following the rest of the Pixel Mentor Event Planning Guide you can host and execute an amazing Client Appreciation event.



Community Event (100+ people)

Are you ready to take your community event planning to the next level? As a salesrepresentative, you have the opportunity to plan an event that willbring your community together and showcase your expertise in event planning. When planninga community event for 100+ people, you'll need to consider the venue, catering, technology,staffing, communication, parking, seating arrangements, security, registration and check-in,emergency plan, and sustainable materials. Here are some tips from Pixel Mentor to help you plan a successful event:

- **Venue:** Select a space that can comfortably accommodate everyone with adequatelighting, sound, and climate control.
- **Catering:** Work with a caterer who can provide enough food and drinks for all guests,considering dietary restrictions and preferences.
- **Technology:** Ensure that the necessary technology is available or can be rented, such assound systems, microphones, and projectors.
- **Staffing:** Hire enough staff, including catering, event, security, and parking attendants, toensure everything runs smoothly.
- **Communication:** Keep guests informed of the schedule, any changes, directions to thevenue and parking, and other relevant details.
- **Parking:** Have adequate parking available, and consider providing a map or directions toparking areas and parking attendants.
- **Seating Arrangements:** Consider assigned seating or designated seating areas toensure everyone has a comfortable place to sit.
- **Security:** Hire security personnel to ensure guests' safety and protect valuableequipment or items.
- **Registration and Check-in:** Organize an efficient system, such as pre-registration orself-check-in stations, to avoid long lines and delays.
- **Emergency Plan:** Have an evacuation plan, emergency contacts, and medicalassistance on standby, and consider hiring a medical professional for the event.
- **Sustainable Materials:** Use paper plates and compostable dinnerware.

By following these tips, you can plan a successful community event that your guests will love.



Identify The Purpose of the Event



Identifying the purpose of the event is crucial when planning a community event for your business. As sales representatives, it is important to ensure that the event aligns with your company's goals and objectives. By clearly defining the purpose, we can create an event that will resonate with our target audience and help us achieve our desired outcomes. Whether it is to promote a new property, generate leads, or build relationships with your clients and partners, having a clear purpose for the event will guide all of our decisions, from selecting the venue and catering to planning the activities and marketing the event. Additionally, a clear purpose will help you measure the success of the event and make any necessary adjustments for future events. Therefore, it is critical to spend time identifying the purpose of the event and communicating it with all stakeholders involved.

Event Purpose Options: This guide offers a variety of event types to suit different objectives, including neighborhood/community events, open house events, fundraising events, supplier/vendor promotion days, holiday events, customer appreciation events, and workshop series. By understanding the purpose of the event, you and your brokerage together can ensure that you have met the needs of your clients and that you can provide an exceptional experience for all attendees.

- ☐ **Educational Seminar** - A professional development event that provides attendees with knowledge and skills to enhance their real estate career.
- ☐ **Networking Mixer** - A social event where you and fellow agents can connect with other industry professionals and potential clients.
- ☐ **Volunteer Day** - A community service event where you, fellow brokerage agents and staff give back to a local charity or organization.
- ☐ **Neighborhood/Community Event** - A community event to bring neighbors together for a fun and social gathering.
- ☐ **Open House Event** - A promotional event for a new listing to attract potential buyers and showcase the property's features.
- ☐ **Fundraising Event** - A charity event to raise money and awareness for a cause or organization in need.
- ☐ **Supplier/Vendor Promotion Day** - A vendor event where local small businesses can showcase and sell their products to the community featured by you and your brokerage.
- ☐ **Holiday Event** - A themed event to celebrate a holiday and bring the community together in a festive atmosphere.
- ☐ **Customer Appreciation** - An event to show gratitude to your current and past clients with special discounts, freebies, and activities.

- ☐ Workshop Series - An educational event that offers a series of workshops or classes on various Real Estate topics such as personal finance, health & wellness, or career development for potential recruits

Create The Invitation List



Planning a real estate event requires a targeted guest list to ensure a successful turnout. As a sales representative, it's essential to identify your target audience, including current and past clients, referrals from industry professionals, and potential leads. **To maximize attendance, invite 20% more people than you can accommodate, as typically only 70 to 80% of invitees attend.** Leverage your Customer Relationship Management (CRM) system, to create a smart list of potential invitees based on the event's purpose. Create RSVP tags or notes, allowing the appropriate marketing materials to be sent to the right contacts. For instance, for a "Foodbank Fundraising In The Park Event," you could use a tag like "Foodbank Park Event RSVP yes" or "Foodbank Park Event RSVP no" so your emails go to the right guests. Let's make your event a success!

- ☐ Make an invitation list (**3 Weeks Out**)

Create a Budget for the Event



At Pixel Mentor, "We stress the significance of developing a budget for your event." Having a thought out budget allows you to distribute resources efficiently while steering clear of surprise costs and guaranteeing all event aspects are accounted for." By outlining expenses, for venues "service providers," promotions," and other necessities "you can make choices "prioritize expenditures " and ultimately maintain financial control over your event." Having a defined budget doesn't just help you manage your finances effectively but also provides a sense of assurance that your event will proceed smoothly without any unexpected financial hiccups.

Here is an example of a budget to use to keep on track with your event budget:

Category	Item Description	Estimated Cost	Actual Cost	Difference
Venue	Rental Fee			
Catering	Food & Drinks			
Entertainment	Band & DJ			
Decorations	Flowers & Decor			
Marketing & Advertising	Flyers & Ads			
Transportation & Parking	Parking & Shuttles			
Staffing	Event Staff			
Equipment Rental	Audio/Visual Equipment			
Misc.	Contingency			

Book Event Venue



Exciting news! Once you've decided on the purpose of your event, it's time to start planning the details. One important aspect to consider is the location and date, which will often depend on each other. Be sure to keep track of everything in a Google document so that you can easily assign responsibilities and note any unique features of the event. This way, you'll be able to stay organized and make sure your event is a success! As always, Pixel Mentor is here to support you every step of the way.

- ☐ Book Venue (**90-120 Days prior**)
- ☐ Design and Order Save the Date Postcards (**60 Days Out**)
- ☐ Create Facebook event (**60 Days Out**)
- ☐ Send Save the Date Postcards (**60 Days Out**)
- ☐ Clean thoroughly if doing on premises this way, you'll need only a quick once-over before the party. (**1 week prior**)
- ☐ Notify the neighbors. Let them know you're having a party if you expect it to be large, loud, or parking-intensive. (**3 Days prior**)

Branded Items/Favors & Supplies

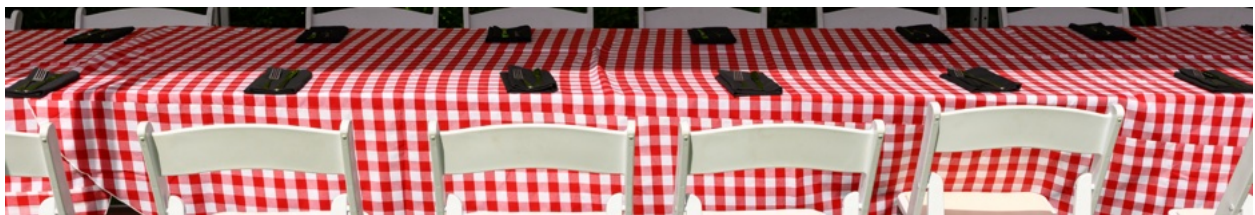


When it comes to event planning, it's important to have all the necessary promotional supplies to create a memorable experience for your attendees. Pixel Mentor recommends choosing a theme for your event and gathering any decorations or music that fit the theme. This could involve making, buying, or borrowing supplies such as balloons, banners, and tablecloths to create a cohesive atmosphere. Don't forget to consider the promotional materials that will showcase your brand and the purpose of the event. This could include customized flyers, brochures, or other branded giveaways that attendees can take home with them. With the right promotional supplies, your event is sure to leave a lasting impression on all who attend.

Here is a list of things to consider when ordering promotional products:

- ☐ Confirm Pricing (check budget) (60 Days Out)
- ☐ Design Items (Stay on theme if one is chosen) (60 Days Out)
- ☐ Order Branded Items (60 Days Prior) • Order Party Favors/Takeaways (60 Days Prior)
- ☐ Giveaway Swag (60 Days Prior)
- ☐ Design/Order Signage (30 Days Prior)
- ☐ Napkins (30 Days Prior)
- ☐ Business Cards (30 Days Prior)
- ☐ Flyers (30 Days Prior)
- ☐ Brochures (30 Days Prior)
- ☐ Thank you Cards (30 Days Prior)

When to Hire Vendors vs. What to Do Yourself



At Pixel Mentor, we know that planning an event can be a lot of work, which is why we recommend considering hiring help to assist you in running the event. While you don't necessarily have to hire help, it can certainly make things easier for you. You might want to consider hiring a high school student or a professional to help with pre- or post-party

cleaning, pass around drinks or appetizers, replenish buffet food, tidy up, and generally take some weight off your shoulders. It's important to have all the tasks covered and plan backups three weeks prior to the event to ensure that everything runs smoothly. Don't hesitate to reach out to vendors and suppliers who can provide the necessary assistance to make your event a success.

☐ Food

- Plan the Menu (**3 Weeks Prior**) and decide if it needs to be outsourced
- If doing the food in house assemble the recipes (**choose only those that can be prepared in advance, perhaps even frozen, with just warming and assembling required on party day**). Make a list of how far in advance each can be made, and compile a shopping list. Place an order with your local delicatessen or bakery, as needed.
- Order any crystal, china, and silverware if renting (**2 Weeks Out**)
- Order any linens if renting (**2 Weeks Out**)
- Do a first round of grocery shopping and cooking if doing it in house. Prepare any dishes that can be frozen. (**2 Weeks Prior**)
- Finish as much of the cooking as you can. For any foods that require cooking on party day, do as much prep (dicing, marinating, rinsing lettuce, etc.) as possible. (**1 Day Prior**)
- Finish any last-minute cooking. This should be absolutely minimal! (**Day of event**)
- Display food. One to two hours before guests arrive, set out appetizers and snacks that won't spoil. Wrap them tightly to ensure freshness; tear off the wrap when the first guest arrives. (**Day of Event**)

☐ Beverage/Bartenders

- Coordinate with the Bartenders (**3 Weeks Prior**)
- Get the drinks required if doing in house (**2 Weeks Prior**)

☐ Servers

- Hire any required servers get numbers in ratio to RSVP numbers (**30 Days Prior**)

☐ Photographer/Videographer

- Book photography (**30 Days Prior**)

☐ DJ/Band

- Come up with a music playlist if not hiring out (**2 Weeks Before**)
- Coordinate with DJ (**2 Weeks Before**)

☐ Security

- Only large community events or large client appreciation events should require security but use your best judgment. (**30 Days Prior**)

☐ Clean Up Team

- This traditionally would be done in house but for a large event you may wish to hire this out or get an event planner service to assist. (**30 Days Prior**)

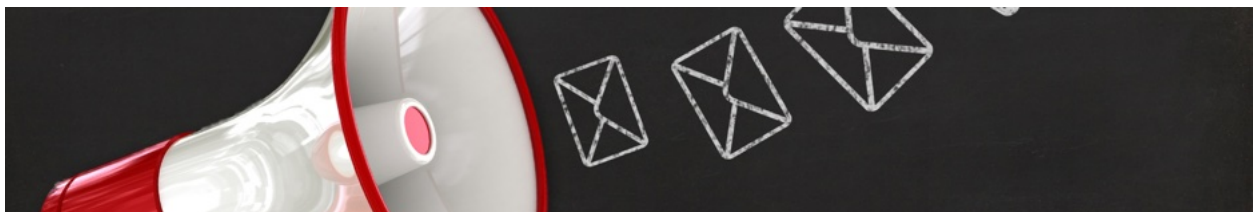
Create Event Stationary and Marketing Material



Here, at Pixel Mentor we are believers that well crafted event materials play a vital role in the success of any event you host. Be it invitations or promotional flyers. As they not only establish the vibe and aesthetic of your event but also serve as effective means of communication to engage your audience and keep your event at the forefront of their minds. Every aspect of your event's stationery. From the invite to the last note of gratitude. Should mirror the theme and intention behind your gathering to leave a lasting impression, on your guests minds and hearts truly unforgettable experience awaits when you put effort into crafting quality marketing materials that transform your event from a simple get together into a cherished memory worth revisiting.

- ☐ Design Invitations (**60 Days Prior**)
 - ☐ Date and Time Range of Event
 - ☐ Address of Venue
 - ☐ RSVP information
 - ☐ Contact Information
 - ☐ Purpose of the Event
 - ☐ If Companions are Allowed
 - ☐ Brokerage Branding
- ☐ Send email invitations (**30 Days Prior**)
- ☐ Send mailed invitations (**30 Days Prior**)
- ☐ Deliver in person invitations (**30 Days Prior**)

Set Up Marketing Messages



Here at Pixel Mentor we recognize the importance of crafted marketing communications in driving the success of any gathering or occasion. Crafting social media updates along with group messages and video invitations can greatly enhance participation and interaction levels. These communications not help in spreading awareness about your event but also generate a feeling of enthusiasm and eagerness among the audience. By sharing progress updates as well

as teasers and sneak peeks leading up to the event date ensures that your audience stays engaged and well informed. Moreover customized video invites can provide an individualized element that conveys to your invitees that they are appreciated and excited about attending your event. Timely and carefully constructed messages guarantee that your occasion remains prominent drawing the appropriate crowd and optimizing the influence of your event.

- ☐ Social Media Posts (**30 Days Out**)
- ☐ Facebook Group Post (**30 Days Out**)
- ☐ Video Invitation (**30 Days Out**)
- ☐ For Events of 100 guests or more Mailer send (**30 Days Out**)
- ☐ Call COI to invite to the event (**30 Days Out**)
- ☐ Email Reminder (**7 days before**)
- ☐ Weekly email for workshop and fundraising confirmed attendees
- ☐ Reminder email to entire list (**2 days before**)
- ☐ Day of email reminder of important details for all confirmed attendees
- ☐ Video Reminder (**Day of**)

Purchase/Organize Event Supplies



At Pixel Mentor we understand the importance of having all your materials ready well in advance of the event to ensure an worry free experience! Whether you're buying decorations setting up seating arrangements reserving catering equipment planning ahead guarantees that everything is set when you require it Early preparation gives room, for any tweaks and substitutions lowering the chances of last minute rushes Organizing your supplies on enables you to concentrate on running your event smoothly with the assurance that all aspects have been taken care of Taking this stance not just helps in saving time but also adds to creating a refined and sophisticated event that will leave a memorable impact, on your guests.

- ☐ Purchase Decorations (**3 Weeks Out**)
- ☐ Clean any crystal, china, and silverware you'll be using. (**2 Weeks Out**)
- ☐ Launder and iron linens if supplying (**2 Weeks Out**)
- ☐ Order food & beverages (do a confirmation headcount) (**1 Week Out**)
- ☐ On RSVP date let vendors and venue know final headcount (**1 Week out**)
- ☐ Finish grocery shopping. Make a detailed cooking schedule for your remaining dishes. (**3Days Prior**)
- ☐ Buy and arrange flowers. (**1 Day Prior**)

Event Set Up



At Pixel Mentor we know how important it is to get things from the start when planning an event! Setting up goes beyond placing tables and chairs. It's about crafting an atmosphere that reflects your vision and objectives perfectly. By paying attention to the setup details like layout design and decorations while ensuring a flow of the space is key, in creating a welcoming environment for your guests to enjoy. Arranging things ahead of time gives you the opportunity to address any issues that may arise and make any adjustments to perfect the ambiance before your event kicks off. Having an arranged arrangement not only improves the guest experience as a whole but also creates the perfect backdrop, for a memorable and significant occasion.

- ☐ Set the stage. Arrange the furniture as you'll want it for the party, making sure that guests can move easily from one room to another. Designate a table or side table for coffee and dessert, if you'll be serving them. Tuck away things that will be in the way, precious items that might get broken (or even be taken), and any clutter. Figure out the lighting if any required. **(1 Week Prior)**
- ☐ Take inventory of cookware and serving dishes. If you don't have enough for every dish you're serving, consider purchasing inexpensive pieces from a discount or thrift store. Label each dish with a Post-it so you'll remember what you plan to use it for at partytime. **(1 week prior)**
- ☐ Stock the bar. Plan three bottles of wine for every four people, and three to four cocktails per guest. **(1 week prior)**
- ☐ Decorate. Arrange candles, put up theme decorations, etc. **(3 Days Prior)**
- ☐ Set up clean-up stations. Place a box of salt, Wine Away (red wine stain remover), club soda, and a couple of rags in a wicker basket, and store a few in strategic places in case a nasty spill occurs. **(3 Days Prior)**
- ☐ Specify a place for coats. Make space in a closet and fill it with hangers or purchase an inexpensive portable garment rack. **(3 Days Prior)**
- ☐ Set the tables or set up the buffet. **(1 Day Prior)**
- ☐ Give the venue a once-over. Do necessary touchups/cleaning **(1 Day Prior)**
- ☐ Place chairs. Don't worry about having enough seating for everyone; fewer seats will encourage mingling. **(Day of Event)**
- ☐ **DON'T FORGET** to Greet guests as they arrive. Things should be organized so you're free to mingle, not tied to the kitchen. **(Day of event)**

Event Follow Up



After the event wraps up and the guests have gone home; it's what comes next that really counts – the follow up phase that makes an impact. Dropping a thank you email or a friendly survey or even sharing some highlights, on social media not only shows gratitude but also allows you to gather important insights. This action strengthens connections. Keeps the excitement alive while setting the stage for future gatherings. By staying in touch after the event concludes shows your professionalism and consideration for making the occasion memorable and ensuring your guests feel appreciated even after it's over.

- ☐ Thank you email to attendees next day
- ☐ Personalized Thank you emails to COI who attended the event next day
- ☐ Share Photos to Social Media (**Over the week after**)
- ☐ Share Videos to Social Media (**Over the week after**)
- ☐ Post an IG story thanking specific guests/COI (**Up to 2 Days After**)

Resources

Event Planning Tools:

[Eventbrite](#) - An easy-to-use platform for creating, promoting, and managing events.

[Canva](#) - A design tool to create professional-looking invitations, flyers, and social media graphics.

[Trello](#) or [Asana](#) - Project management tools that help you organize tasks, timelines, and checklists.

[Google Calendar](#) - For scheduling and sending reminders for important dates and deadlines.

Vendor & Supplier Directories:

[Thumbtack](#) - A marketplace to find local professionals for catering, photography, and event setup.

[Yelp](#) - For finding and reviewing local vendors, from caterers to event planners.

[Eventective](#) - A resource for finding venues, event suppliers, and services. (US Only)

Marketing Resources:

[Later.com](#) - Social media scheduling tool to plan and automate your event promotion.

[Mailchimp](#) - An email marketing platform to send out invitations, reminders, and follow-ups.
[BombBomb](#) - A tool for creating personalized video invitations and follow-up messages.

Budgeting & Financial Tools:

[Google Sheets](#) - For creating and managing your event budget.
[Mint](#) - A budgeting app to help track expenses and stay within your financial plan.
[Quickbooks](#) - simplify how you track your business finances, so you can focus on the bigger picture.

Event Décor & Supply Stores:

[Party City](#) - For purchasing decorations, party supplies, and event-themed items.
[Amazon](#) - For a wide range of event supplies, including last-minute items.
[Etsy](#) - For unique, custom-made décor and invitations.

Networking & Follow-Up Tools:

[LinkedIn](#) - For connecting with attendees and vendors before and after the event.
[SurveyMonkey](#) - To create and send surveys for gathering feedback post-event.
[ThankView](#) - A platform for sending personalized thank-you videos to guests.

Learning & Inspiration:

YouTube - Channels like "[EventPlanning Blueprint](#)" and "[QC Event School](#)" offer tutorials and tips on event planning.
[Pinterest](#) - For gathering event inspiration, themes, and DIY ideas.
Event Planning Blogs - Blogs like "[Social Tables](#)" offer expert advice, checklists, and industry insights.

25 Event Ideas

1. Spring Garden Party



- ❖ Host a garden-themed open house with local floral arrangements, gardening tips, and DIY plant stations.
- ❖ **Incorporate a Seed Exchange Station:** Set up a seed exchange table where guests can bring and swap seeds for their favorite plants. This not only adds a fun, interactive element to the party but also encourages community connection and sustainable gardening practices. Plus, it gives guests a meaningful takeaway that ties into the garden theme!

2. Summer BBQ & Open House



- ❖ Combine an open house with a casual BBQ. Offer grilled food, drinks, and yard games.
- ❖ **Create a "Taste of the Neighborhood" Grill-Off:** Invite local restaurants or talented home chefs to participate in a friendly grilling competition where each prepares a signature dish. Guests can sample the different offerings and vote for their favorite. This

not only adds a fun, interactive element to the BBQ but also highlights the culinary talent in the area, making the event a community celebration as well as an open house.

3. Fall Harvest Festival



- ❖ Celebrate the season with a pumpkin patch, apple cider, hayrides, and seasonal décor.
- ❖ **Host a "Build Your Own Scarecrow" Contest:** Provide basic supplies like straw, old clothes, and hats, and invite families or teams to create their own scarecrows. Display the scarecrows around the event, and let attendees vote for their favorite. The winner can take home a fall-themed prize. This activity is fun for all ages, adds to the festive atmosphere, and gives everyone a creative, hands-on experience that ties perfectly into the fall harvest theme.

4. Winter Wonderland Tour



- ❖ Showcase properties with festive holiday decorations, hot cocoa, and winter-themed giveaways.

- ❖ **Create a "Hot Cocoa Tasting Station":** Set up a tasting station with a variety of gourmet hot cocoa flavors and toppings, like peppermint, salted caramel, or dark chocolate. Guests can sample different combinations and even create their own custom blend. To add an extra touch, provide small recipe cards so guests can recreate their favorite cocoa at home. This cozy, interactive element not only enhances the wintery atmosphere but also leaves guests with a warm and memorable experience during the tour.

5. Community Yard Sale



- ❖ Organize a neighborhood-wide yard sale, offering local homeowners a chance to declutter and meet potential buyers.
- ❖ **Create a "Map of Finds":** Before the event, ask participating neighbors to highlight a few of their most interesting or valuable items. Create a simple map or flyer that lists these "hot spots" and hand it out to shoppers as they arrive. This not only adds excitement and helps guide traffic but also ensures that no one misses out on the best deals and treasures!

6. Home Improvement Workshop

- ❖ Partner with local contractors or DIY experts to offer workshops on home improvement projects.



- ❖ **Set Up a Tool Library Sign-Up:** During the workshop, offer attendees the opportunity to join a neighborhood tool library where they can borrow and share tools for future projects. This encourages community collaboration, reduces the need for everyone to purchase expensive tools, and keeps the momentum going for home improvement efforts long after the workshop ends. It's a great way to build connections and provide ongoing value to your attendees.

7. Movie Night Under the Stars



- ❖ Host an outdoor movie screening in a park or spacious backyard, complete with popcorn and blankets.
- ❖ **Create a Themed Photo Booth:** Set up a simple photo booth with props and backdrops related to the movie you're showing. This gives guests a fun, interactive activity before the movie starts and provides them with a memorable keepsake. You can even offer to email them their photos, which also gives you a subtle way to capture contact information for follow-up after the event!

8. Charity Auction & Mixer



- ❖ Organize a charity auction, offering donated items or services with proceeds benefiting a local cause.
- ❖ **Include a "Mystery Box" Auction Item:** Add an element of surprise by auctioning off a "Mystery Box" containing a valuable, but undisclosed, item. Provide hints or small clues throughout the event to build excitement and encourage higher bids. This not only adds a fun twist to the auction but also generates buzz and anticipation among attendees, making the event more engaging and memorable.

9. Wine & Cheese Tasting



- ❖ Partner with local vineyards and cheese shops to offer a tasting event at a luxury listing.
- ❖ **Include a "Blind Tasting Challenge":** Add an element of fun and intrigue by offering a blind tasting challenge where guests sample wines or cheeses without knowing their labels. Provide tasting notes and encourage guests to guess the varietal, region, or type of cheese. You can even offer small prizes for those who guess correctly. This adds a layer of excitement and encourages conversation, making the tasting experience more interactive and engaging for everyone involved.

10. Fitness in the Park



- ❖ Sponsor a community fitness event, such as a yoga class or boot camp, in a local park.
- ❖ **Incorporate a "Fitness Bingo" Challenge:** Create bingo cards with different fitness activities or challenges (e.g., "Complete 10 push-ups," "Run a lap around the park," "Try a new yoga pose"). As participants complete each activity, they mark off the corresponding square on their card. Offer small prizes for those who complete a row, column, or the entire card. This adds a playful, competitive element to the workout, encourages participants to try new exercises, and keeps the energy high throughout the event.

11. Family Fun Day



- ❖ Create a kid-friendly event with face painting, bounce houses, and games, while parents tour a family-oriented property.
- ❖ **Create a "Family Passport Adventure":** Give each family a themed "passport" booklet with a list of activities or stations to visit throughout the event (e.g., face painting, sack races, crafts, or a photo booth). As they complete each activity, they get a stamp or sticker in their passport. Once they've completed all the activities, they can turn in their passport for a special prize or entry into a raffle. This encourages families to explore

everything the event has to offer and adds an element of adventure that kids and parents alike will enjoy.

12. Neighborhood Cleanup Day



- ❖ Organize a community cleanup event, followed by a social gathering to thank volunteers.
- ❖ **Host a "Trash Treasure Hunt":** Turn the cleanup into a fun scavenger hunt by creating a list of unusual or specific items for participants to find while they clean up (e.g., a blue bottle cap, a unique rock, or a specific type of litter). Award small prizes for those who find the most items on the list or the most interesting "treasure." This adds an element of fun and competition to the event, making the cleanup more engaging, especially for kids and families, while still achieving the goal of beautifying the neighborhood.

13. Ice Cream Social



- ❖ Host a summer ice cream social, inviting the community to enjoy frozen treats and tour nearby listings.
- ❖ **Create a "Build-Your-Own Sundae Contest":** Set up a sundae bar with a variety of ice cream flavors, toppings, sauces, and mix-ins. Invite guests to create their own unique

sundae creations and then have a panel of judges (or the other guests) vote on categories like "Most Creative," "Best Flavor Combination," or "Best Presentation." Winners can receive fun prizes, like gift cards or branded goodies. This interactive and delicious contest adds a fun twist to the event, encouraging creativity and friendly competition while everyone enjoys their sweet treats.

14. Local Art Showcase



- ❖ Feature local artists at an open house, with their work displayed throughout the property for sale.
- ❖ **Include a "Live Art Creation Station":** Set up a space where local artists can create artwork live during the event. This could be anything from painting or sculpting to digital art on a tablet. Attendees can watch the creative process in real time, interact with the artists, and even place bids on the works being created. This not only adds a dynamic, interactive element to the showcase but also gives guests a deeper appreciation for the artistry and techniques behind the pieces. Plus, it offers a unique opportunity to purchase one-of-a-kind art made right before their eyes.

15. Food Truck Rally

- ❖ Coordinate a food truck event in a popular neighborhood, drawing a crowd and showcasing nearby homes.



- ❖ **Introduce a "Food Truck Passport" Challenge:** Create a passport booklet featuring each participating food truck, with space for a stamp or sticker from each one. Encourage attendees to visit as many trucks as possible, trying different dishes and collecting stamps along the way. Those who complete their passport by visiting all the trucks can enter a raffle for a prize or receive a small reward, such as a branded tote bag or a discount voucher for a future event. This challenge adds an extra layer of fun and encourages guests to explore a variety of offerings, making the rally a more engaging and memorable experience.

16. Holiday Cookie Exchange



- ❖ Invite the community to bring their favorite holiday cookies to exchange, with a hot chocolate bar and home tours.
- ❖ **Incorporate a "Cookie Decorating Station":** Set up a station with plain cookies, a variety of icing, sprinkles, and decorations where guests can get creative and decorate their own cookies. This is a fun, hands-on activity that adds an interactive element to the event. You can even have a friendly decorating contest with categories like "Most Festive," "Most Creative," or "Best Use of Sprinkles," with small prizes for the winners. It's a great way to engage guests of all ages and adds a personal touch to the traditional cookie exchange.

17. Community Sports Tournament

- ❖ Sponsor a local sports tournament, such as a soccer or basketball game, with prizes and refreshments.



- ❖ **Host a "Skills Challenge" Side Event:** In addition to the main tournament, set up a skills challenge station where participants can compete in individual activities related to the sport, such as a free throw contest in basketball, a penalty kick challenge in soccer, or a fastest serve contest in tennis. Offer prizes for the top performers in each challenge. This not only adds extra excitement to the event but also allows participants who may not be on a team or those who are eliminated early to stay engaged and have fun. It's a great way to involve more community members and showcase different talents.

18. Pet Adoption Day



- ❖ Partner with a local animal shelter to host a pet adoption event at a family-friendly property.
- ❖ **Create a "Pet Personality Matchmaking" Station:** Set up a station where potential adopters can fill out a brief questionnaire about their lifestyle, preferences, and what they're looking for in a pet. Based on their answers, volunteers can suggest specific animals that might be a good match for them. You could even include fun personality profiles for each pet, highlighting traits like "Cuddle Expert," "Adventure Seeker," or "Lap Lover." This personalized approach helps connect people with pets that suit their needs and increases the chances of successful, lasting adoptions. It also adds a thoughtful, engaging element to the event, making the adoption process more enjoyable and memorable.

19. Farmer's Market Meet & Greet



- ❖ Set up a booth at a local farmer's market to meet potential clients and hand out branded reusable bags.
- ❖ **Host a "Farm-to-Table Recipe Swap":** Set up a booth where attendees can share their favorite recipes using ingredients found at the market. Provide recipe cards where they can write down their recipes and exchange them with others. You can also feature a local chef who demonstrates how to cook a simple, seasonal dish using market ingredients, offering samples and recipe cards to take home. This not only promotes the fresh, local produce available at the market but also fosters a sense of community and encourages attendees to explore new culinary ideas. It adds an interactive and educational element to the meet & greet, making the experience more enriching and engaging.

20. Back-to-School Supply Drive



- ❖ Organize a drive to collect school supplies for local students, offering a tour of a family-friendly property as a bonus.
- ❖ **Create a "Personalized Backpack Station":** In addition to collecting supplies, set up a station where kids can decorate and personalize their backpacks. Provide fabric markers, patches, and stickers so they can make their new backpack unique and special. For those who might not be able to purchase a backpack, offer donated ones that they can customize. This adds a fun, creative element to the supply drive, making the experience more memorable for the kids and giving them something they can proudly use throughout the school year. It also encourages participation and makes the event more engaging for families.

21. Sunset Cocktail Party

- ❖ Host an evening cocktail party on a property with a stunning view, offering drinks and light appetizers.



- ❖ **Set Up a "Sunset Toast" Ceremony:** Plan a special moment where all guests gather to raise a glass just as the sun begins to set. Provide a signature cocktail or mocktail created specifically for the occasion, and invite everyone to share a collective toast to the sunset. You could even pair the toast with a brief, inspiring message or a few words of gratitude to enhance the experience. This creates a memorable, shared moment that adds significance to the event and makes the sunset the highlight of the evening. It's a simple yet impactful way to elevate the atmosphere and leave a lasting impression on your guests.

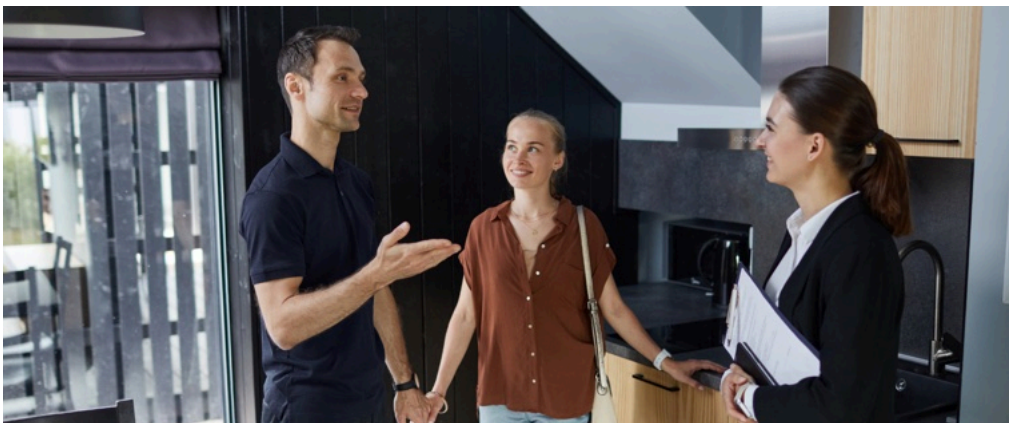
22. DIY Holiday Crafting Event



- ❖ Offer a crafting workshop for creating holiday décor, such as wreaths or ornaments, at a cozy listing.
- ❖ **Create a "Crafting Kit Swap":** Encourage guests to bring their own holiday crafting kits or supplies to exchange with others. Set up a swap station where participants can trade materials like ribbons, ornaments, fabric, or other craft essentials. This not only adds an element of surprise and variety to the event but also fosters creativity as guests get inspired by new materials they may not have chosen themselves. Plus, it's a great way to build community by sharing resources and ideas, making the crafting experience even more collaborative and enjoyable.

23. Eco-Friendly Home Tour

- ❖ Highlight eco-friendly homes or features, with tips on sustainable living and energy-saving products.



- ❖ **Offer "Sustainability Starter Kits" as Takeaways:** Provide guests with small, eco-friendly starter kits that include items like reusable shopping bags, bamboo utensils, and a packet of seeds for planting. Each item in the kit can be accompanied by a tip on how to incorporate sustainable practices into daily life. This not only reinforces the theme of the tour but also gives attendees practical tools to start making eco-friendly changes at home. It's a thoughtful and educational takeaway that extends the impact of the tour beyond the event itself.

24. Community Talent Show



- ❖ Host a talent show featuring local performers, from musicians to comedians, at a large property or community center.
- ❖ **Create a "Talent Showcase Video Wall":** Set up a video wall or a projection screen where short clips or highlight reels of each participant's talent can be displayed before or after their live performance. This allows the audience to get a glimpse of the performers' preparation, behind-the-scenes moments, or even talents that didn't make it to the stage. It adds an extra layer of engagement and gives participants more exposure. Additionally, you can loop the video wall during intermissions or as people are arriving, creating anticipation and excitement for the performances to come.

25. Virtual Home Tour & Q&A

- ❖ For those who prefer digital, host a virtual tour of a property with a live Q&A session, offering an interactive experience for remote buyers.
- ❖ **Include an Interactive "Design Your Dream Space" Segment:** Before or after the tour, offer a segment where participants can use a simple online tool or app to virtually redesign one of the rooms in the home. Provide a selection of furniture, color schemes, and décor options that align with the home's style, allowing participants to get creative and personalize the space. During the Q&A, you can discuss their design choices and how the home's layout or features support different styles. This interactive element makes the virtual tour more engaging and allows potential buyers to envision themselves in the space, adding a fun and personalized touch to the experience.



EVENT PLANNING CHECKLIST

120-90 DAYS OUT

Keep Your Event On Track Every Time!

☐

Identify the Purpose of the Event

The Purpose of the Event is: _____

☐

Create the Invitation List

Invitation List Tag in CRM: _____

☐

Create a Budget for the Event

Where the Spreadsheet is Saved: _____

☐

Book Event Venue

Event Venue: _____ Event Date: _____

Notes:





EVENT PLANNING CHECKLIST

60 DAYS OUT

Keep Your Event On Track Every Time!

- ☐ **Design and Order Save the Date Postcards**
Where the Design is Saved: _____
- ☐ **Create Facebook event**
- ☐ **Send Save the Date Postcards**
- ☐ **Confirm Pricing of Branded Items**
- ☐ **Design Branded Items** Stay on theme if one is chosen!
- ☐ **Order Branded Items**
- ☐ **Order Party Favours/Takeaways**
- ☐ **Order Giveaway Swag**
- ☐ **Design Invitations**

Notes:





EVENT PLANNING CHECKLIST

30 DAYS OUT

Keep Your Event On Track Every Time!

- ☐ **Make Invitation List**
- ☐ **Design/Order Event Signage**
Where the Design is Saved: _____
- ☐ **Order/Buy Napkins**
- ☐ **Order any Needed Business Cards**
- ☐ **Design Branded Items** Stay on theme if one is chosen!
- ☐ **Design and Order Flyers**
- ☐ **Design/Order Brochures**
- ☐ **Hire any required servers get numbers** in ratio to RSVP numbers
- ☐ **Book photography/videographer**
- ☐ **Hire DJ**
- ☐ **Only large community events/large client appreciation** events should require security but use your best judgment.
- ☐ **Hire Clean Up Team**
- ☐ **Send Email Invitations**
- ☐ **Send Mailed Invitations**
- ☐ **Deliver In-Person Invitations**
- ☐ **Set Up Social Media Posts**
- ☐ **Set Up Facebook Group Post**
- ☐ **Set Up Video Invitation**
- ☐ **Call COI to Invite to the Event**
- ☐ **Set Up** (For Events of 100 guests or more) **Postcard Mailer Send**

Notes:





EVENT PLANNING CHECKLIST

3 WEEKS OUT

Keep Your Event On Track Every Time!

- ☐ Plan the Menu and Decide if it Needs to be Outsourced
- ☐ Coordinate with the Bartenders
- ☐ Purchase Decorations
- ☐ If Outsourcing Food, Order or Hire Catering

Notes:

Large light blue rectangular area for taking notes.



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EVENT PLANNING CHECKLIST

2 WEEKS OUT

Keep Your Event On Track Every Time!

- ☐ Order Any Crystal, China, and Silverware if Renting
- ☐ Order Any Linens if Renting
- ☐ Do a First Round of Grocery Shopping & Cooking, If Doing In-House. Prepare any Dishes That Can be Frozen
- ☐ Come Up with a Music Playlist, If Doing In-House
- ☐ Coordinate with DJ, if required
- ☐ Clean Any Crystal, China, and Silverware Being Used
- ☐ Launder and Iron Linens, if supplying

Notes:





EVENT PLANNING CHECKLIST

1 WEEK OUT

Keep Your Event On Track Every Time!

- ☐ **Clean Venue Room Thoroughly, if Doing on Premises**
- ☐ **Notify the Neighbours. If You Expect it to be Large, Loud, or Parking-Intensive**
- ☐ **Set Up Email Reminder for Those Invited**
- ☐ **Set Up Weekly Email for Workshop and Fundraising Confirmed Attendees**
- ☐ **Set Up Reminder Email to Entire List - 2 Days Before**
- ☐ **Order Food & Beverages After Doing a Confirmation Headcount**
- ☐ **On RSVP Date Let All Vendors & Venue Know Final Headcount**
- ☐ **Finish Grocery Shopping. Make a Detailed Cooking Schedule Remaining Dishes - 3 Days Prior**
- ☐ **Arrange the Furniture. Designate a Table or Side Table for Coffee & Dessert**
- ☐ **Figure Out the Lighting, if any required**
- ☐ **Take Inventory of cookware & Serving Dishes. Label each dish with a Post-it For Each Dish**
- ☐ **Stock the Bar**
- ☐ **Decorate Venue Room: Arrange candles, Put Up Theme Decorations - 2-3 Days Prior**
- ☐ **Set Up Clean-up Stations with Napkins, Stain Remover, Hand Sanitizer**
- ☐ **Specify a Place for Guest Coats**

Notes:





EVENT PLANNING CHECKLIST

DAY BEFORE

Keep Your Event On Track Every Time!

- ☐ **Finish any Cooking.** For any foods that require cooking on party day, do as much prep (dicing, marinating, rinsing lettuce, etc.) as possible
- ☐ **Buy & Arrange Flowers**
- ☐ **Set the Tables or Set Up the buffet**
- ☐ **Give the Venue a Once-Over Clean.** Do Any Necessary Touchups/Cleaning

Notes:





EVENT PLANNING CHECKLIST

DAY OF THE EVENT

Keep Your Event On Track Every Time!

- ☐ **Finish Any Last-Minute Cooking.** This Should Be Absolutely Minimal!
- ☐ **1-2 Hours Before Guests Arrive Set Out Appetizers & Snacks That Won't Spoil**
- ☐ **Send Final Email Reminder with Important Details for All Confirmed Attendees**
- ☐ **Send Out Final Video Reminder**
- ☐ **Place Chairs**
- ☐ **Greet Guests as They Arrive** Have Them Sign In, if needed

Notes:





EVENT PLANNING CHECKLIST

AFTER THE EVENT

FOLLOW UP IS KEY!!

- ☐ Send Thank You Email to Attendees - Next Day
- ☐ Send Personalized Thank You Emails to COI Who Attended
- ☐ Share Photos to Social Media Over the Next Week
- ☐ Post an IG Story Thanking Specific Guests/COI Don't Forget To Tag Them!

Notes:

