



## Kym Mason's Guide to Producing Client Appreciation Events that Engage and Add Value



**The Defining Difference**  
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## Producing Client Appreciation Events that Engage and Add Value

Hosting events that show client appreciation helps you get referrals from a stronger and more loyal client base, boost your credibility, increase awareness of you and your brand and also lets your customers see you in a new light. Commit to 1 event bi-annually to begin, then move to quarterly for the most impact across the year.

Following are 5 of the most successful events that top producer Kym Mason has hosted over the years, which have helped gain traction, create engagement and build long-term customer loyalty.

### Event #1: Fall Client Party Drive-thru/Drop-in – Pumpkin Patch/Corn Maze

- What:** We provide a passport to a specific corn maze/pumpkin patch in the community and a free sugar pumpkin for each guest to take home with them. Have gift bags ready with a branded pumpkin scooper and orange “gratitude” branded bracelet for each family member, and Halloween candy, etc.
- Where:** Party is at our office and is a drive thru or drop in
- When:** Usually on a Wed, 4-6:30pm, first week of October
- Who:** Entire database, all contacts. Approximately 500-1000 attendees.
- Cost:** \$1,500 - \$2,000

#### 6 Months Before

- Order branded pumpkin scoopers
- Order branded bracelets (We add “grateful” on one side and our company logo on the other)

#### 2-3 Months Before

- Order small orange gift bags
- Create marketing pieces/invitation:
  - » “Save the date” email
  - » Flyers
  - » Postcard invitation
  - » Html for actual email invite
  - » Social media post (animated video if possible)
  - » Social media “square” to use for FB event

## Producing Client Appreciation Events that Engage and Add Value

### Fall Client Party Drive-thru/Drop-in – Pumpkin Patch/Corn Maze (Continued)

#### 6 Weeks Before

- Send email “save the date”
- Create FB event and invite clients/agents/etc.

#### 4 Weeks Before

- Mail postcard or flyer invitation (snail mail)
- Buy Halloween candy

#### 3 Weeks Before

- Email invitation
- FB event - individually invite FB contacts if haven't already. Post in the event

#### 2 Weeks Before

- Put together gift bags.
- LO's call clients and agents to invite and follow up with text. Send hand-written note.

#### 1 Week Before

- LO send video text to clients and agents, “hope to see you there”.

#### Day Of

- Post a video before the party - of the room and people working to get ready for the party.
- Take pics and videos during the event, selfies, etc.
- Post on all socials that night or in the morning. Tag everyone you can.

#### Optional

- Have a raffle with a fun prize, a TV for example. Have attendees fill out a raffle form with name, phone, email. Draw the winner at 6:30pm, record a video and post it. Call the winner. Deliver the prize to them at a future date.

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### Event #2: Fall Client Party in Person – Pumpkin Patch/Corn Maze

- What:** We provide entry to corn maze and a free sugar pumpkin for each guest, all family members. We also have pumpkin painting, cookies, hot cider, and hot chocolate.
- Where:** Party is at a local corn maze/pumpkin patch
- When:** Usually on a Wed, 4-6:30pm, first week of October
- Who:** Entire database, all contacts. Approximately 100-150 attendees.
- Cost:** \$2,500 - \$3,000

#### 2-3 Months Before

- Book a venue.
- Book a Photographer.
- Order small orange gift bags
- Create marketing pieces/invitation:
  - » “Save the date” email
  - » Flyers
  - » Postcard invitation
  - » Html for actual email invite
  - » Social media post (animated video if possible)
  - » Social media “square” to use for FB event

#### 6 Weeks Before

- Send email “save the date”
- Create FB event and invite clients/agents/etc.

#### 4 Weeks Before

- Mail postcard or flyer invitation (snail mail)

#### 3 Weeks Before

- Email invitation
- FB event - individually invite FB contacts if haven’t already. Post in the event

## Producing Client Appreciation Events that Engage and Add Value

### Fall Client Party in Person – Pumpkin Patch/Corn Maze (Continued)

#### 2 Weeks Before

- LO's call clients and agents to invite and follow up with text. Send hand-written note.
- Order cookies ~ need 200+ cookies
- Party Rental urns ~ 2 for water only – for hot chocolate and cider, two 100 cup coffee makers rented from Party Rentals
- Purchase and bring to event:
  - » Bottled water
  - » Cups w/ lids 200
  - » Hot Chocolate 200, Cider 100
  - » Hot Chocolate sugar free 1 box
  - » Napkins 2 pkg
  - » Red & White paper boats
  - » Stir sticks
  - » Tables & plastic covers for tables
  - » Table Cloth and tape for sign in table and hot cocoa table – holiday plastic
  - » Sign in Sheets with permission to use pictures, and pens
  - » Name tags 200 & sharpies
  - » Scissors, box knife, gloves
  - » Garbage can
  - » Power/extension cords
  - » Paints & brushes for pumpkin painting
  - » Pop-up tents

#### 1 Week Before

- LO's send video text to clients and agents, "hope to see you there".

#### Day Of

- Post a video before the party - of the venue and people working to get ready for the party.
- Take pics and videos during the event, selfies, etc.
- Post on all socials that night or in the morning. Tag everyone you can.

#### 1-2 Weeks Later

- Get pics from photographer and share on social and with clients who attended, can be some good family photos.

## Producing Client Appreciation Events that Engage and Add Value

### Event #3: Monthly SALT Life Real Estate Syndicate Classes

- What:** Training and workshops for realtors to help grow their business
- Where:** Zoom
- When:** 3<sup>rd</sup> and 4<sup>th</sup> Thursdays of each month, 10am
- Who:** Members of SALT Life Real Estate Syndicate, private Facebook group for agents. 5-10 attendees live, out of 250 members, attend live. Recording available for members.
- Cost:** \$1750/month for team that manages Syndicate FB Group, secures guest speakers, creates marketing, etc.

#### 4 Weeks Before

- Create Facebook event and post on your page.
- Invite all realtors and syndicate group members.

#### 3 Weeks Before

- Record a video inviting realtors to attend and a little info about guest speaker(s).

#### 2 Weeks Before

- DM the video invite to each realtor and group member invited.
- Call realtors to personally invite them and make sure they saw the event.

#### 1 Week Before

- Social media post reminding realtors to attend.

#### Day Before

- LO send text to realtors, "Hope to see you on zoom for the event tomorrow!"

#### Day Before

- Attend the zoom event.
- Take a selfie with the screen in the background.
- Post to social media and tag attendees

#### After Event

- Text realtors who attended.
- LO send a handwritten note to those who attended.

**Topic examples:** Reels, Tic Toc, Building a team, how to use video, Adspend, Instagram



## Producing Client Appreciation Events that Engage and Add Value

### Event #4: Quarterly VIP Dinner Partner

**What:** A sit-down plated dinner and drinks  
**Where:** Fine dining restaurant  
**When:** Thursday, 6-8:30pm  
**Who:** A+ partners and database. Approximately 35-50 attendees.  
**Cost:** \$2500

#### 2-3 Months Before

- Contact Manager of eating establishment and pick a date.
- Decide on details:
  - » Choose what menu options will be offered.
  - » How will tables be arranged?
  - » Are you paying for drinks, or just first drink, etc.

#### 4 Weeks Before

- LO's call clients and agents to invite after Evite goes out and follow up with text.
- Send hand-written note.
- Pay attention to when the event is at capacity and post to let everyone know it is full.
- Send out Evite to clients with RSVP for numbers of people per household.

**Evite verbiage:** *We want to thank you for your business and celebrate with you! We would be very pleased if you would join us on Wednesday, (date) at 6pm at [name of restaurant] for [company name's] VIP Dinner. Let's take a moment to break bread and raise a glass... to you! We want you to know how much we value you. You are what makes our business such a success and we appreciate you. There will be 3 dinner selections to choose from and beer and wine is on me! Due to limited space, this is an adults-only event. Also due to limited space and safety precautions, we will close the event when we have 35 guests RSVP'd. Please RSVP to this evite or contact [event contact name] with [company name] at [phone number] with any questions. We hope to see you there!*

#### 1 Week Before

- Email restaurant manager with the head count/RSVPs.
- LO send video text to clients and agents who RSVP'd, "look forward to seeing you there".

#### Day Before

- LO send text to clients and agents who RSVP'd, "See you tomorrow!"

## Producing Client Appreciation Events that Engage and Add Value

### Quarterly VIP Dinner Partner (Continued)

#### Day Of

- Buy prizes. (Boehm's chocolates, Crimson Cove specialty food items, journals, small books)
- Arrive 15 mins early and choose a seat that is centrally located. Make sure team spreads out to different tables. Record a video of you and team in the room, getting ready for the party, and post as a story on SM.
- Typically, lots of standing and talking for the first 30 mins. Make introductions amongst guests. Servers will bring drinks.
- Around 6:30pm, host asks everyone to take a seat so servers can take our food orders.
- Servers take dinner orders.
- While waiting for food, host does a "thank you" quick speech and then does "prizes", this is a basket full of local goodies they can choose from:
  - » Most referrals in last 90 days
  - » Most closings in last 90 days
  - » Attended any classes Kym has taught?
  - » Set goals or created a business plan with Kym?
  - » Done a personal loan with The Mason Group? More than 1? More than 2, etc?
  - » Referred a family member to The Mason Group?
  - » Came to our wedding in Key West?
  - » If you are a hero, please stand:
    - ∞ Teacher
    - ∞ Healthcare worker
    - ∞ First responder
    - ∞ Military or veteran
  - » If you post and tag Kym or The Mason Group on SM before you leave tonight, a prize for you.
- Take pics throughout the evening.
- Kym gives the venue her credit card at end of night.
- LO text each attendee and thank them for coming.
- Post the pics on Social Media and tag as many people as possible.

#### After Event

- Take pics throughout the evening.
- Host gives the venue her credit card at end of night.
- LO text each attendee and thank them for coming.
- Post the pics on Social Media and tag as many people as possible.



## Producing Client Appreciation Events that Engage and Add Value

### Event #5: Quarterly Jersey Mikes Client Party

- What:** We provide dinner for every member of their family. This includes a sandwich, chips, and a drink (of their choice)
- Where:** Jersey Mike's (or other walk-up restaurant)
- When:** Wednesday, 4-6:30pm
- Who:** Clients and their buyer's agent who have closed in last 90 days. Approximately 20-50 attendees.
- Cost:** \$300 - \$850

#### 1 Month Before

- Contact Manager of eating establishment and pick a date.
- Decide on details:
  - » What you will cover for each person.
  - » Make sure shift supervisor will be prepared and staffed accordingly.
  - » Get permission to set up a table, pop up tent and banner outside the front of their store.

#### 2 Weeks Before

- Send out Evite to clients with RSVP for numbers of sandwiches per household.

**Evite verbiage:** *Thank you for trusting us to help with your home financing! We want you to know how much we value you as clients and partners. Please stop by the Jersey Mikes Subs in The Trails shopping center in Silverdale to pick up dinner on us! The Mason Group will be there to say Hi and Thank You!! Make sure you stop by our table to pick up a Cornerstone sticker, so they know you are on our tab! RSVP to this invite by Friday – (date) and let us know how many subs you will be getting for your family! You can call Jersey Mikes 360-204-5181 ahead of time to order, or just stop in on Wednesday, (date) from 4PM to 6:30PM only please! We will cover a sub, chips and soda per family member that RSVP'd to this evite! Come see us and have dinner on us!*

#### 1 Week Before

- Email restaurant manager with the head count/RSVPs.
- LO send video text to clients and agents "hope to see you there".

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### Quarterly Jersey Mikes Client Party (Continued)

#### Day Of

- 30 minutes before start time - set up tent, table, tablecloths, banners and Company branded Stickers to give clients so Jersey Mikes staff know to put them on the tab. Bring business cards for Loan Officers. Other flyers/handouts if appropriate. I bring a bag of candy thanking the Jersey Mike's staff in advance for all their hard work.
- Record a video of you and team, getting ready for the party, and post as a story on SM.
- Take pics throughout the event and post on Social Media at the end of the night or next morning, tag as many people as possible.
- Jersey Mikes keeps a tab of all sandwiches ordered and Kym gives them her credit card at the end of the night.

#### After Event

- Email a thank you to the Manager of the establishment, as well as shift supervisor.

*Event ideas and planning details provided by Kym Mason, Area Manager, Cornerstone Home Lending*