

PLANNING THE PERFECT HOLIDAY HAPPY HOUR



Strengthen your relationships before year-end and start January with momentum.

A holiday happy hour is a simple, low-pressure way to connect with your best clients, referral partners, and prospects. It's not about selling — it's about showing appreciation and building goodwill before the new year.

STEPS TO A SUCCESSFUL HOLIDAY HAPPY HOUR

1

Pick Your Date Early:

First two weeks of December.

4

Send Invites & Reminders:

4 weeks, 2 weeks, 3 days before.

2

Select The Right Venue:

Partner with a local business for exposure.

5

Add A Memorable Touch:

Branded drink tickets, small gifts.

3

Craft Your Guest List:

Top 50–100 contacts.

6

Follow Up:

Thank-yous and social media recaps.

Holiday Happy Hour Planning *WORKSHEET*

EVENT DETAILS

Date: _____

Time: _____

Venue: _____

Capacity: _____

Budget:

Item	Cost	Notes

Guest List:

Name	Contact	Invite Sent	RSVP	Notes

Timeline:

Time	Activity	Notes

Follow Up Tracker:

Name	Thank You Sent	Notes

PARTY Time

EMAIL TEMPLATES:

Initial Invite (4 weeks before) Subject:

You're Invited: Holiday Happy Hour at [Venue] — Dec. [Day]

Body: Warm greeting, details, RSVP link, friendly close.

Reminder (2 weeks before) Subject:

Reminder — Holiday Happy Hour Dec. [Date]!

Body: Short reminder, details, RSVP link.

Final Reminder (3 days before) Subject:

Just 3 days until our Holiday Happy Hour

Body: Quick reminder, RSVP link, "see you soon."