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## Consumer Affairs and Business Regulation

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### RE36R05: Conducting Open Houses and Developing a Safety Plan

This continuing education unit is designed to help the real estate agents prepare to conduct safe, efficient open houses, keeping in mind agency relationships and establishing overall policies to help ensure homeowner and agent safety.

1. Discuss Open House parameters and guidelines with property owners. ( Agency Relationships)
  - A. Disclose/Discuss with the seller the agency relationship of the open house agent with the seller.
    1. Designated Seller Agents vs. Facilitator role. Explain the difference.
    2. Obtain written consent from the seller for a non-designated agent to conduct an open house.
  - B. Discuss Open House Timeframes
  - C. Discuss Sign-in Sheets/Permission to Contact/Identification Requirements with seller
  - D. Post sign requiring identification to enter outside the property. (If Required)
  - E. Open House Placard must disclose the agency relationship
  - F. Preparing an Offer at the open house (disclose relationship)
2. Prepare the Property for Viewing
  - A. Advise homeowners as how to best prepare the property for viewing
    1. Disclose exclusions to the sale
    2. Remove clutter
    3. Repair dangerous distractions
    4. Complete unfinished projects
    5. Keep entrances clear
    6. Snow removal/Homeowner responsibility.
    7. Discuss securing/removing valuables, medicines, legal weapons
3. Agents Responsibility while conducting the Open House
  - A. Be aware of your Agency Relationship while conversing with prospective buyers.
    1. Designated Seller/Buyer Agent (OLDCAR)
    2. Facilitator (confidentiality?)
    3. Be Careful about what information you provide. (i.e. Why are they selling? How much will they take?)
  - B. Procedures for viewing/signing in and identification.
    1. Agent recording prospective buyers' information.
    2. Identification procedures
    3. Posting requirements outside the property.
  - C. Crowd Control
    1. Develop a plan for directing prospective buyers through the property.
    2. The role of assistants and observers
    3. Strategically place observers throughout the property to ensure proper security.
4. Agent Liability
  - A. New Construction
    1. Safety/Hardhats/Removal of Debris
  - B. Explain Homeowner Responsibilities
    1. Clear pathways/entrances
    2. Safe stairways/ working lights
    3. Snow/Debris removal
    4. Direct seller to secure/remove valuables/legal weapons and secure medicine.
5. Secure the Property
  - A. Ensure all windows are closed and locked when you depart the property.
  - B. Ensure all candles are extinguished.
  - C. Ensure all appropriate appliances are not operating when you depart. (i.e. Stove/Dishwasher)
  - D. Close blinds as instructed.
  - E. Don't allow people see you hide a key
6. Develop A Safety Plan for Open Houses
  - A. Arrive early so you may properly secure the property; unlock doors turn on all the lights.
  - B. Ensure your office know where you are conducting your open houses.
  - C. Park in a well-lit area when you arrive
  - D. Ensure your vehicle cannot be blocked from departure.
  - E. Perform a visual of the area before departing your vehicle: Ask yourself the following questions:
    1. Does there appear to be questionable activity in the area?
    2. Does anything look suspicious?
    3. Are there people loitering around the area?
    4. Do you feel uncomfortable?
    5. 10 Second Rule ( take a good look around you )
  - F. Perform a visual inside the property when arriving: Ask yourself these questions:
    1. Is anyone present who should not be there?
    2. Does anything seem out of place?
    3. Develop an exit/departure strategy
    4. Walk-through property to ensure homeowner secured valuables, medicines etc.
    5. Position yourself and observers that accompany you so that the property is secure
    6. Always direct clients/customers to walk in front of you. Direct do not follow
    7. Do not walk into basements, attics and alleys alone.
7. Developing an Overall Safety Plan
  - A. Discuss Business Scenarios
    1. Open House Policy
    2. Listing Presentations/CMA
    3. Property Viewings
    4. Phone Conversations
    5. Advertising
    6. Discuss 1-5 and NAR review case studies
  - B. Safety Guidelines/Office Procedures
    1. Don't obstruct windows with flyers
    2. Keep doors locked after hours.

3. Do not tell prospective buyers you will be alone with them at the office.
  4. Never have a first meeting at a property if unaccompanied.
  5. Be in Control — do not let others drive
  6. Your office should always know where you are and when you will be returning.
  7. Have customers fill out profile sheets so that you have full
    - Knowledge as to who you are working with.
    - Think about an ID Policy within your office.
  8. Always carry a charged phone with you.
  9. Consider a Buddy system for CMA/Open Houses/Viewing
  10. Develop a distress signal within your office.
  11. Advertise with safety in mind.
  12. Avoid word like: Vacant, abandoned, owner has relocated, estate
  13. Dress Wisely-not too flashy.
  14. Always go with you gut.
    - If you feel uncomfortable do not ignore it.
    - Document harassing phone calls.
8. Safety on the Road
- A. Do not engage others in Road Rage.
  - B. Possible consequences about putting personal information, pictures on business cards, handout materials etc.
  - C. Non-published numbers/blocking calls.
9. Discuss Case Studies/Show Safety Videos

**Suggested References and Handouts:**

- NAR Video: Don't be a Victim
- NAR: Power Point Presentation / Learn from others Experiences  
<http://www.realtor.org/MarkCom.nsf/pages/RSWPresTools?OpenDocument>
- Realty Times Articles – for case studies