



Putting REALTOR® Safety First: Safety Strategies for the Modern REALTOR® Brokerage





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ABR, CBR, CFS, CRS, E-PRO, GRI, GREEN, LMC, PSA, RENE, SRS, AHWD, ITI, WCR

- ▶ Broker/Owner/Realtor® since 1998
- ▶ Past State & Local REALTOR® President
- ▶ FPC , Congress Stephen Lynch
- ▶ 2017 Inductee, NAR RPAC Hall of Fame
- ▶ Golden R , Presidents Circle Member since 2013
- ▶ Commissioner Division of Occupational Licensure , Board of Real Estate Brokers and Salesperson, MA
- ▶ Approved Instructor in MA since 2014
- ▶ 2017 Real Estate Educator of the Year
- ▶ 2016 Recipient of the MA Public Policy and Property rights Advocacy Award
- ▶ 2010, MA State REALTOR® of the Year
- ▶ 2010, South Shore REALTOR® of the Year
- ▶ Instructor for REBI, REBAC, NAR, RPR, ZipLogix

NAR's Safety Program

- ▶ Reduce the number of safety incidents that occur in the industry
- ▶ Every REALTOR® comes home safely to their family every night
- ▶ www.nar.realtor/safety
- ▶ 3 Hour and 1 hour programs



Brokerage Safety Spheres

- ▶ Agent's personal safety
- ▶ Your office and colleagues
- ▶ Buyers Clients- are they being advised
- ▶ Sellers Client- are they being advised
- ▶ Online , Encryption of personal info & Data
- ▶ **What happens in one safety sphere can impact others**

Five Key Actions to take now

- ▶ Have a Strategy
- ▶ Put together Best practices/Policies
- ▶ Learn from/Share webinars and videos
- ▶ Learn and use personal protection resources
- ▶ Improve and Create safety culture for your office
- ▶ Ask Agents to work together in the planning of safety
- ▶ Use NAR's Safety Tools (Forms & Checklists)

A High-Risk Business?

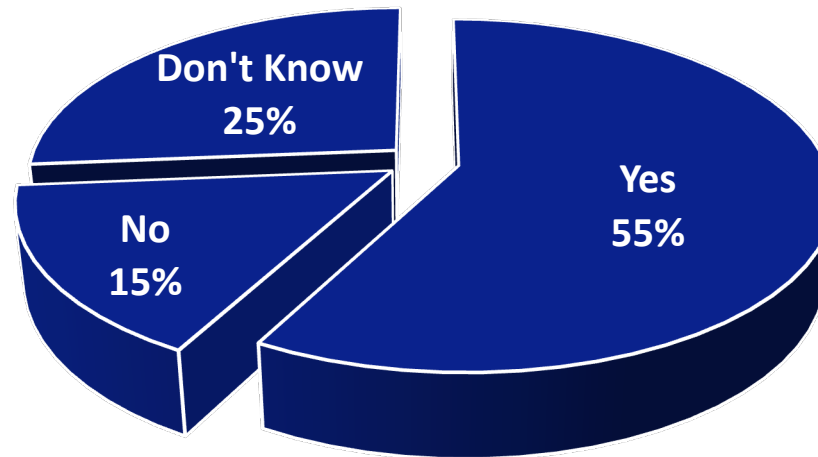
- ▶ DO you agents know that
- ▶ 87 real estate professionals met with fatal injuries in 2019 per U.S. Bureau of Labor Statistics
- ▶ One-third caused by “violence and other injuries”
- ▶ Many incidents are never reported
- ▶ When one real estate professional is harmed, all suffer

Why Is Real Estate Risky?

- ▶ Image of success
- ▶ Meeting unknown prospects at properties
- ▶ Working at unfamiliar properties at odd hours
- ▶ Sitting open houses alone
- ▶ Entering vacant properties
- ▶ Driving with strangers while multitasking
- ▶ Public visibility
- ▶ Many ways for prospects to make contact
- ▶ Handling client's personal information
- ▶ Who would harm me?

Where does your Brokerage fall ?

Real estate brokerage has standard procedures for agent safety



So.....What's your office policy ?

- ▶ Crisis Communication Check list
 - ▶ Homeowners Safety Check list
 - ▶ Marketing Materials for office
 - ▶ Personal Safety tools for agent
 - ▶ Ongoing Safety Education
 - ▶ Safety Webinars
 - ▶ Ready to use safety messages
- ▶ <https://www.nar.realtor/safety/realtor-safety-toolkit-for-associations-and-brokerages>

What's your office policy for Prospects ?

- ▶ Set it up in ZipLogix
- ▶ Prefill info for each agent
- ▶ Have a policy for form retention
- ▶ Role play & Practice

PROSPECT IDENTIFICATION FORM

This form is designed for your safety and security, as well as the safety of property owners and our agents. We appreciate your consideration and cooperation in supplying the requested information. All security information is kept confidential and is not shared, sold, or used for solicitation purposes. Completed forms are kept in this office.

INFORMATION MAY BE SUBJECT TO VERIFICATION

Agent Name: _____ Date: _____

Your Name(s): _____

Home Address: _____

City: _____ State: _____ ZIP: _____

Home #: _____ Work #: _____ Mobile#: _____

Email: _____

☐ From out of town/area?

Local Address: _____

I/we can be reached at this location until: _____

Employer: _____ Phone #: _____

Auto _____

Make/Model: _____ Color: _____

Owner: _____

License Plate #: _____ State: _____

PLEASE ATTACH A PHOTOCOPY OF DRIVER'S LICENSE OR PHOTO ID.

AGENT'S PROPERTY-SHOWING SAFETY CHECKLIST

BEFORE A PROPERTY SHOWING	AT THE PROPERTY
<ul style="list-style-type: none"> <input type="checkbox"/> Check out prospects on Google, social media or a background checking site. <input type="checkbox"/> Ask prospect to meet at your office or in a public place. <input type="checkbox"/> Ask all prospects to fill out a customer identification form and provide ID. <input type="checkbox"/> Photocopy a prospect's driver's licenses. <input type="checkbox"/> Ask for a prequalification letter from lender, verify the letter's authenticity. <input type="checkbox"/> Introduce prospects to the office manager or a coworker. <input type="checkbox"/> Sign out on the office tracking board. <input type="checkbox"/> Leave a copy of your property-showing itinerary at the office. <input type="checkbox"/> Wear a company identification badge and display your company name on your car. <input type="checkbox"/> Dress professionally in business outfits, wear shoes that you can run in. <input type="checkbox"/> Take a partner—another agent, friend, or family member—with you. <input type="checkbox"/> Set up a distress code with the office, friends, or family. <input type="checkbox"/> Make sure that co-workers, friends, or family who receive an alert know what to do. <input type="checkbox"/> Lock your purse or briefcase in your car trunk before arriving at an appointment. <input type="checkbox"/> Remind your clients to remove or lock away keys, credit cards, mail, bills, family photos, firearms, drugs, jewelry, fine crystal, furs, and other valuables and secure pets. 	<ul style="list-style-type: none"> <input type="checkbox"/> Learn the house before your show it, look for escape routes and obstacles like fenced yards. <input type="checkbox"/> Show the property in daylight. <input type="checkbox"/> Park your car at the curb in front of the property, not the driveway. <input type="checkbox"/> Take a photo of the prospect's license plate and send it to the office. <input type="checkbox"/> Call or text the office to let them know you have arrived, where you are, and who you are with. <input type="checkbox"/> Set the alarm app on your phone for the time you think it will take to show the home. <input type="checkbox"/> Set the alert app on your phone for quick emergency notifications. <input type="checkbox"/> Keep at least one hand free. <input type="checkbox"/> Before entering a vacant property, walk the perimeter to check for signs of squatters, break-ins, or other illegal activity. <input type="checkbox"/> Follow lockbox procedures. <input type="checkbox"/> Leave the front door unlocked for a quick exit. <input type="checkbox"/> Walk behind the prospect as you view the property, don't turn your back. <input type="checkbox"/> Keep prospects together. <input type="checkbox"/> Stay close to the entrances of rooms and avoid going into cellars, attics, walk-in closets, and other "dead-end" rooms. <input type="checkbox"/> What else could you add to the list?

What's your office policy for Showings?

- ▶ Review in Groups
- ▶ Role Play Scripts
- ▶ Build teams for Safety Buddies
- ▶ Bring Agents to properties for "Drills"
- ▶ Emergency Code
- ▶ Meet in public place

Prospective Buyer Sample Scripts

- ▶ “We’re parked in front of a house you have for sale. Can you meet us here?”
- ▶ “Why do I need to come to your office first? “
- ▶ “ I don’t have time to meet you at your office and it’s out of my way. Why can’t I just meet you at the house?”
- ▶ “Why do you need to see my ID? I haven’t been asked to provide identification at other open houses.”
- ▶ “Why do you need all of this information about us?
- ▶ Buyer at a property showing: “Let me hold the door for you.”
- ▶ Buyer during a property showing: “Why are you calling your office?”
- ▶ Prospective buyer via email: “We saw the home online and already know it’s the one for us. We really want to write an offer on this property before it goes under contract. Can you help us get into this property or not?”

**SAFETY SYSTEM SCRIPTS
HOW WOULD YOU RESPOND TO
THESE QUESTIONS AND COMMENTS
FROM PROSPECTIVE BUYERS?**

Seller's Property –Showing Checklist

- ☐ Remove keys, credit cards, checks, and cash.*
 - ☐ Lock up anything that contains personal information including letters and bills, ID badges, address books, and family notes and schedules on the refrigerator or a bulletin board.*
 - ☐ Remove or lock up valuables such as jewelry, furs, crystal, small electronics, laptops, and valuable collectibles.*
 - ☐ Remove or lock up firearms and ammunition, knives, and other weapons including knife blocks on kitchen counters.*
 - ☐ Lock up prescription drugs.*
 - ☐ Remove family photos, particularly of children.*
 - ☐ Repair items like a loose banister and remove obstacles that could cause a fall.
-
- ☐ Make arrangements to remove or secure pets during showings.
 - ☐ Consider extra security or monitoring for the period that the property is on the market.
 - ☐ After a showing, do a walk-through to check that doors and windows are locked, no items are missing, and nothing has been damaged.
 - ☐ Don't show the home on your own if prospects or another agent comes to the door.
 - ☐ Warn children not to open the door to strangers.
 - ☐ Place a "Not For Rent" sign in the window of a vacant property to prevent rental fraud.
 - ☐ Review homeowners insurance coverage.
 - ☐ **What else could you add to this list?**

OPEN HOUSE AND MODEL HOME SAFETY CHECKLIST

BEFORE	DURING
<ul style="list-style-type: none"> <input type="checkbox"/> State in advertisements that identification will be required and surveillance will be in use. <input type="checkbox"/> Ask a friend or colleague to sit the open house or model home with you. <input type="checkbox"/> Be cautious when placing open house directional signs. Turn off the car and take the keys and mobile phone with you for each sign. <input type="checkbox"/> Lock your purse in your car trunk before arriving at the open house location. <input type="checkbox"/> Park at the curb so your car cannot be blocked. <input type="checkbox"/> Keep a hand free--carry only non-valuable business items. <input type="checkbox"/> Keep your phone and car keys with you at all times. <input type="checkbox"/> Check mobile phone's signal strength prior to the open house. <input type="checkbox"/> Inform neighbors of the open-house event and ask them to alert you of suspicious activity. <input type="checkbox"/> Check the rooms for dead ends and small spaces. <input type="checkbox"/> Position webcams, start up surveillance app. <input type="checkbox"/> Determine at least two escape routes from the property. <input type="checkbox"/> Check the outside for escape route obstacles—fences, shrubbery, ponds. <input type="checkbox"/> Unlock all deadbolt locks for easy access to the outside. <input type="checkbox"/> Lock other entrances so there is only one entry point. <input type="checkbox"/> Do not allow visitors to enter before you have completed your safety checks 	<ul style="list-style-type: none"> <input type="checkbox"/> Sit in a room with a strong phone signal. <input type="checkbox"/> Start up the alert and alarm apps on your smartphone. <input type="checkbox"/> Establish a schedule for calls or alerts so that if you don't check in, your contact will call you. <input type="checkbox"/> Ask visitors to complete a guest register with full name, address, phone number, email, and vehicle information. <input type="checkbox"/> Throughout open house and model home hours, be alert to visitors' comings and goings. <input type="checkbox"/> Consider hiring a security officer for the open-house event. <input type="checkbox"/> If the home has a security system, know how to trigger a remote notification of distress.
	AFTER
	<ul style="list-style-type: none"> <input type="checkbox"/> Inform the office, friend, or family when you begin closing; set an alert countdown or check-in time. <input type="checkbox"/> Lock front door before you do the security check of all doors and windows. <input type="checkbox"/> At close-up time, check the interior of the house prior to locking deadbolts. <input type="checkbox"/> Work from the top floor to the bottom, back of the house to the front, locking the deadbolts behind you. <input type="checkbox"/> Check the backyard and garage. <input type="checkbox"/> What else could you add to this list?

Open House/Model Home Safety



ARA Safety Video Series: REALTOR® Open House Safety HD

<https://youtu.be/ShrnflFDuu4>

Open House/Model Home Safety

- ▶ Use Pre-Registration tools
- ▶ Be Consistent with policy
- ▶ Risk of Discrimination
- ▶ Harder for all to follow if everyone doesn't follow
- ▶ Use of recording devices ?
- ▶ Ask for ID before Entering



Listing Appointment Safety



LISTING APPOINTMENT SAFETY CHECKLIST

- ☐ Ask how the seller found your company and you
- ☐ Verify the address and location of the property.
- ☐ Verify if the caller is the owner of the property.
- ☐ Subscribe to a background check website.
- ☐ Do a background check on the caller.
- ☐ Check out the history of the property (foreclosed? vacant? previously listed? FSBO?).
- ☐ Check out the location and neighborhood (is it in an isolated place? a dangerous neighborhood?).
- ☐ Take a colleague with you.
- ☐ Let your office, family, or a friend know where you are going and who you are meeting.
- ☐ Set your smartphone to send an alert or alarm.
- ☐ When touring the property, always let the owner walk in front of you.
- ☐ Avoid going into attics, basements, walk-in closets, or small dead-end spaces.
- ☐ **What else could you add to this list?**

- ☐ Get to know workers in other nearby businesses and be aware of their schedules
- ☐ Lock doors other than the main entrance and keep a clear exit route from the reception desk to the door
- ☐ Keep windows unobstructed so that passersby can see in
- ☐ In large companies, require visitors to sign in and wear a visitor badge—a simple stick-on name tag will do
- ☐ When visitors arrive, the person with whom they have an appointment should escort them from reception and to the meeting area
- ☐ Maintain an agent sign-in/sign-out board and ask agents to leave a property-showing itinerary at the office
- ☐ Keep an up-to-date list (for use by managers and supervisors only) of agents' emergency contact information as well as make, model, and license plate numbers of vehicles
- ☐ If you encounter an individual while working alone, indicate that you are not alone. Say something like, "My supervisor will be right with you"
- ☐ Don't discuss where you live or after-work or vacation plans within earshot of visitors, temporary or new coworkers, or anyone else who makes you feel uncomfortable
- ☐ Don't leave purses, wallets, or small electronic on desks or tucked behind counters
- ☐ Keep file cabinets locked
- ☐ Lock up business letterhead, business cards, checkbooks, invoices, and business forms
- ☐ Inventory and mark business equipment for easy identification in case of theft or damage
- ☐ Lock up AV equipment when not in use
- ☐ Secure spare and master keys in locked cabinets

Office Safety

Safety@YourBrokerageName.com

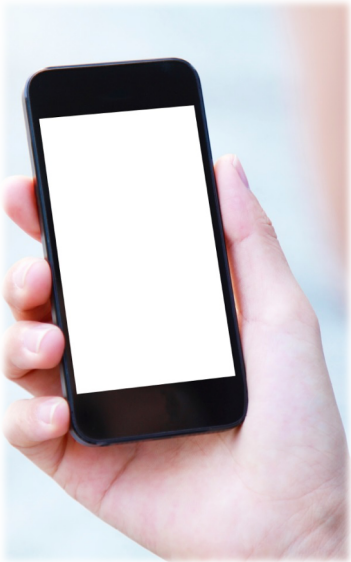
Should your Brokerage offer Self-Defense Training

COMPANY-SPONSORED SELF-DEFENSE TRAINING

- ▶ Any programs offered must accommodate individuals with disabilities or special needs.
- ▶ Training programs should be offered to everyone, regardless of gender. Both men and women are vulnerable in the field.
- ▶ Make sure that outside safety trainers are properly qualified and insured.
- ▶ Before hiring a safety trainer, ask your attorney to review the engagement contract.
- ▶ If the training will involve physical activities or weapons training, ask participants to sign a waiver.
- ▶ Work with your attorney on all of these steps.

Adapted from “Window to the Law, Implementing Office Safety Measures Legal Considerations,” Jessica Edgerton, Associate Counsel, National Association of REALTORS®. Go to www.nar.realtor/videos/window-to-the-law-implementing-office-safety-measures-legal-considerations.

Smartphone—As A Personal Safety Tool



- ▶ GPS tracking
- ▶ Texting
- ▶ Alerts and alarms
- ▶ Photo sharing
- ▶ Surveillance
- ▶ Call blockers

Safety Applications for Smartphones

[Expand all](#)

FOREWARN

Homesnap Pro

Kleard

LifeLine Response

People Smart

PROtect

SafeShowings

See Something Send Something

SentriKey® Real Estate App: Agent Safety Feature

Trust Stamp

Wearsafe

Calls to 911—Agents Should Know

- ▶ Where do 911 calls go?
- ▶ Response time?
- ▶ Can the emergency system locate you?
- ▶ Is the system GPS enabled?
- ▶ Can the emergency operator call back?
- ▶ Can police provide extra patrols during open-house events or around vacant properties?
- ▶ How/when should you report non-emergencies?

Office/Parking Lot Safety

- ▶ Motion Lighting after dark
- ▶ Secure place for documents/checks
- ▶ Cameras ?
- ▶ Document retention and disposal /where is your trash located
- ▶ Secure place for property keys
- ▶ Secure place for files

The Crime Equation

$$\begin{array}{c} \text{Motive} \\ + \text{ Opportunity } \\ = \text{Crime} \end{array}$$

As a Broker you can assist with education to Remove part of the equation (opportunity) and lessen likelihood of a crime

The Strongest Defense

“The strongest defense is a plan of what you will do to avoid high-risk situations and what you will do if you find yourself in danger.”

Amanda Ripley, *The Unthinkable, Who Survives When Disaster Strikes—and Why*.

What's Your Plan ?



Thank you

