



RE36R25: Staying Safe in Real Estate: Best Practices including Open Houses and Digital Safety

A Description of Open Houses and Safety

This course helps real estate professionals stay safe and confident in every aspect of their work, including open houses, client meetings, and digital communication. It focuses on developing a practical safety plan, maintaining awareness during client interactions, and applying best practices for personal and property security during both in person and online real estate activities.

1. Understanding the Importance of Safety in Real Estate
 - a. Overview of risks, statistics, and the importance of a safety mindset.
 - b. Defining the three dimensions of real estate safety: physical, personal, and property.
 - i. Physical safety – protecting yourself and others from harm in the field.
 1. Personal safety – maintaining professional boundaries, confidentiality, and awareness.
 - a. Property safety – safeguarding clients' homes, belongings, and information during showings or open houses.
 - c. Understanding agency relationships and implications for safety.
 - i. The agent's duty of care to clients, including their property.
 1. How disclosure and confidentiality influence safety awareness.
2. Preparing the Property, the Seller, and the Agent
 - a. Discuss homeowner responsibilities for safe property preparation.
 - i. Remove valuables, medications, weapons, and confidential documents.
 - ii. Ensure lighting, pathways, and stairways are safe and accessible.
 - b. Property readiness and environmental hazards.
 - i. Address unfinished projects and repair trip hazards.
 - ii. Manage clutter, snow, and debris removal.
 - c. Establishing expectations with sellers about safety procedures during showings and open houses.
3. Conducting Safe Showings and Open Houses



- a. Managing agency disclosure and visitor identification requirements.
 - i. Explain designated agent vs. facilitator roles.
 - ii. Obtain written consent for non-designated agents to conduct open houses.
 - iii. Require all visitors, agents, and service personnel to sign in to create a written record of who entered the property.
 - b. Open house logistics and crowd management.
 - i. Develop a plan for directing prospective buyers through the property.
 - ii. Use assistants or observers strategically for security oversight.
 - iii. Ensure only one entry/exit point is used by the public during the event when possible.
 - c. Maintaining personal safety while conducting showings.
 - i. Position yourself between the client and the exit.
 - ii. Never enter attics, basements, or isolated areas alone.
- 4. Developing and Implementing a Personal Safety Plan
 - a. Arrival procedures and situational awareness.
 - i. Park in well-lit areas and ensure your vehicle cannot be blocked in.
 - ii. Conduct a visual scan of surroundings using the '10-Second Rule'.
 - b. Communication with office and colleagues.
 - i. Always inform your office or partner of your location and schedule.
 - ii. Establish a distress code or emergency check-in policy.
 - c. Developing an exit strategy.
 - i. Identify multiple exits upon arrival.
 - ii. Keep your phone charged and accessible.
- 5. Digital Safety and Data Protection
 - a. Managing personal and professional information online.
 - i. Avoid oversharing schedules, travel plans, or personal details on social media.
 - ii. Use professional contact channels only when engaging with clients online.
 - iii. Refrain from posting real-time photos or property locations that could reveal when a home is vacant.



- b. Protecting client confidentiality, access systems, and electronic documents.
 - i. Safeguard lockbox and digital keypad codes; share them only with authorized parties and never through unsecured text or email.
 - ii. Change or deactivate access codes promptly when listings close or agent access changes.
 - iii. Use secure passwords and two-factor authentication on all devices and property access platforms.
 - iv. Avoid sending confidential documents or access information via unsecured links or public Wi-Fi.
 - c. Recognizing and preventing digital scams or impersonation attempts.
 - i. Verify sender identity before clicking links, opening attachments, or sharing personal data.
 - ii. Be alert for spoofed emails or fraudulent requests for wire transfers or access credentials.
 - iii. Report phishing attempts and suspicious messages immediately to your broker or IT administrator.
- 6. Liability and Legal Considerations
 - a. Understanding liability in safety-related incidents.
 - i. Know when the agent, broker, or homeowner may share responsibility.
 - ii. Maintain appropriate professional liability insurance coverage.
 - b. Responsibilities under Massachusetts law.
 - i. Ensure disclosures are accurate and safety warnings are communicated to clients.
 - ii. Keep detailed records of incidents, reports, and client communications.
 - c. Post-incident procedures and follow-up.
 - i. Report safety incidents promptly to your broker and local authorities if necessary.
 - ii. Participate in post-incident reviews to improve procedures.
- 7. Case Studies, Discussion, and Resources
 - a. Review of NAR and state-specific case studies.
 - b. Evaluate real incidents to identify warning signs and preventive measures.
 - c. Discussion of practical application and reinforcement.



8. Office Training, Policies, and Safety Plans

a. Salespersons:

- i. Check with your broker for office policies, implementations and reference materials.

b. Brokers

- i. Creating brokerage-wide policies and procedures for safety.

1. Encourage all agents to participate in annual safety training.

- a. Maintain written office safety plans and emergency response procedures.

2. Implementing office systems and reporting procedures.

- a. Use check-in/check-out logs for appointments and open houses.

- i. Encourage a buddy system for showings and CMAs.

3. Providing reference materials and accountability tools.

- a. Distribute safety checklists, ID policies, and emergency contact sheets.

- i. Review safety protocols at team meetings and annual renewals.

Suggested References and Handouts:

- REALTOR® Magazine article: [Safety in the Field: 8 Strategies to Keep You Protected](#)
- REALTOR® Magazine article: [5 Tips for Agent Safety & Security in the Digital Age](#)
- [Mass.gov: MGL Chapter 140 § 131 – License to Carry Firearms \(LTC\)](#)

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