

# Agent Safety Guidebook



Adopted in part from information supplied by the  
Greater Aurora and the Springfield Association of REALTORS®

# Agent Safety Guidebook

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# Introduction

**B**eing a real estate agent means many things to a variety of people. Perhaps you chose your career for the freedom it offers you to set your own schedule and pace. You have control over many aspects of your job, including some control over your work environment. As statistics show, our work environment has become more violent over the last few years.

This Guidebook includes information and forms to assist member offices establish a safer working environment for agents and employees. We hope each and every one of you are diligent in distributing copies of this Guidebook and encourage everyone to take the time to read the materials contained herein. We also encourage the use of the forms provided.

Although we cannot guarantee that any program, including this one, will assure complete safety, the implementation of the procedures as soon as possible will help make our work environment as a whole a safer one. We encourage each member office to conduct a safety session to discuss items contained herein and what type of safety procedures your company will conduct.

**IMPORTANT NOTE:** Always remember nothing is too insignificant. If you, or anyone you know, speak of an unusual or suspicious occurrence, report it to a member of the Committee on Agent Safety. You may be stopping a tragedy before it happens!

# Vehicle Safety

1. Vehicle maintenance is important. Keep your vehicle in good working order to avoid breakdowns. Keep your gas tank at least half full at all times.
2. Obtain clear directions when you are going to show a house. Do not get yourself into a situation where you have to search for the property with a prospect in the vehicle. This is particularly important at night.
3. Do not leave valuable (phones, briefcases, purses, etc.) in view. Lock up items of value in the trunk of the vehicle. Do this prior to leaving for or arriving at your destination.
4. Always lock your vehicle when you are driving and keep windows up.
5. If someone suspicious approaches your vehicle at an intersection or stop sign, blow your horn. If you are seriously concerned, look both ways and run the light or the sign. Usually, police will understand. If they don't and you are issued a citation its still better that risking your life.
6. If you notice someone following your vehicle, do not drive to your home. Drive to the nearest police or fire station.
7. Before you exit the vehicle, look around you. If you see someone suspicious stay in your locked vehicle until the situation takes care of itself. If the situation persists, remove yourself by driving away
8. After exiting the vehicle, lock it.
9. If your vehicle has an anti-theft device, use it.
10. Avoid leaving an extra set of keys in a "secret" location. You can't fool a thief and you are exposing yourself to unnecessary harm.
11. Upon approaching your vehicle to enter it, look around to see who is present. Being and appearing alert is an important deterrent to a potential criminal. Also look under your vehicle as you approach it. Before getting in, look through the windows into the front and rear areas to make sure no one has entered the vehicle.
12. Carry your keys with a single key clutched in your hand. This could assist you in fending off an attacker. Do not hold the keys with one or two keys projecting between your fingers. An attacker could compress your hand and break your fingers.
13. If you are working at night, be sure to park your vehicle in a well lit area.

# Safety While Showing Property

1. Complete the Agent Personal Data Form and make sure it is an accessible location in the office.
2. When setting up a showing with a prospect for the first time, tell them about the Agent Safety Program and prepare them that they will have to complete a Prospect Identification Form designed by North Shore – Barrington Association of REALTORS® in cooperation with law enforcement officials.
3. Try to meet the prospects at your office or another public place when you meet them for the first time. If you work out of your home, make arrangements with the North Shore – Barrington Association of REALTORS® to use their office space for your meeting.
4. If you must meet a prospect at a property, secure as much information as you can during the first telephone contact with them. Use the Prospect Identification Form for a list of questions you may want to ask the prospect. Obtain a license plate number and the make and model of their vehicle. Leave a copy of that information at your office in an accessible place. When you get to the property, make sure the prospect's vehicle description and plate number match what you were told on the phone. If not, keep driving.
5. Don't make the mistake of assuming that just because a woman calls you to set up an appointment that here is no problem. Similarly, when a couple meets you at the property, you still need to follow the safety procedures.
6. When qualifying prospects, ask the right questions and be a good listener. For example: "Who other than yourself will be seeing the property?" "At what number can I call you back to confirm the appointment?" "How were you referred to me?" "Where do you currently reside?"
7. Don't wear flashy jewelry. Act and dress conservatively.
8. If possible, use the buddy system when showing property to new prospects.
9. Always take your own vehicle when showing property.
10. Don't park in the driveway where someone can block you between their car and the garage. Even if you park at the end of the driveway, your prospect can park directly behind you. Lock your vehicle and set the alarm, if you have one.
11. Never show a property alone at night.
12. Let potential buyers explore the home by themselves following behind them. Don't go into the basement or confined areas. Always make sure you have a clear unobstructed path to the nearest door.
13. Never underestimate your instincts. If you are suspicious, keep yourself between the prospect and the door. Direct the prospect to walk ahead of you as you enter each room. At the first sign of abnormal behavior stop and head for the door.
14. The committee on Agent Safety has adopted a coded distress signal to be used throughout the association membership. "Blue File" is meant to appear harmless to the prospect yet alerts others. It is strongly advised that each agent become familiar with this signal.
15. Carry a cellular phone and a whistle, shriek alarm, or pepper spray.

# Open House Safety

1. Advertise more than one name of an agent that will be hosting an open house.
2. If the property is vacant, do not mention that in the ad.
3. Make sure your office knows the location and time of the open property. Supply the office with the telephone number of the property on your cellular number.
4. Have two people host the open house.
5. Find out if working telephones are present at the open house. If the property is vacant, bring a cellular phone with you. If you don't have a cellular phone borrow one.
6. Notify the neighbors on either side that you are hosting an open house and the times you will be there. Let them know what you drive, the make and color of your vehicle, and ask them to contact your office if they notice anything suspicious.
7. Have a guest register prominently displayed and encourage prospects to sign the register as part of your safety program.
8. If you must be at an open house alone, let prospects that enter the house know that someone else is expected to show up at any time.
9. When showing prospects through property, let them enter rooms ahead of you. Always make sure you have a clear unobstructed path to the nearest door.
10. Do not enter basements or confined areas ahead of the prospect. Let them lead the way.
11. Every office is encouraged to become acquainted with and use the distress code, "Blue File." If you work out of your home, familiarize a member of your family with this distress signal.

# General Rules of Safety

1. Be alert. Prevention is the best defense.
2. Always trust your gut instinct. The minute you feel uncomfortable, get out of the situation.
3. Don't wear flashy jewelry. Act and dress conservatively. Don't carry large amounts of money.
4. Don't sit alone at open houses.
5. If you use a picture on a business card, use a business photograph. Avoid glamour shots. Don't list your number on your business card.
6. Invest in a pager so you are never out of touch with your office.
7. If you don't own one, rent or borrow a cellular phone if you must sit at an open house that doesn't have a telephone.
8. Meet prospects at your office. If you work out of your home, make arrangements with the Springfield Association of REALTORS to use their office space.
9. Never meet a prospect based on only one telephone call.
10. Always take your own vehicle when showing property.
11. Let potential buyers explore the home on their own and follow behind. Don't go into the basement or confined areas.
12. Leave word with someone in your office where and with who your appointments will be.
13. Always meet first-time clients in your office.
14. Ask clients to show ID for sign-in sheets at your office or at an open house. Retain a copy of the ID if at all possible. Tell them this is company policy.
15. When qualifying prospect, ask the right question and be a good listener. For example: "Who other than yourself will be seeing the property?" "At what number can I call you back to confirm the appointment?" "How were you referred to me?" "Where do you currently reside?"
16. Find out as much about the prospects as possible in advance. Ask where they work, what they do, etc.
17. Never show a property alone at night.
18. Never advertise a property as vacant.
19. Police authorities recommend real estate offices maintain files for each salesperson that include a recent photograph, vehicle information, driver's license number, emergency contact information, medical information, and pager and cellular numbers. Make sure your information is on file.

20. Report any threatening or suspicious experiences to the police or the Committee on Agent Safety. Never assume something is too insignificant to report.
21. When out of office for a long time, let someone know where you are going and call in every hour or so.
22. Be smart about which prospects at the property. Do not park in the driveway and always lock your vehicle.
23. Familiarize yourself, members of your office and your family with “Blue File.”
24. If you are suspicious, trust your instincts and keep yourself between the prospect and the door. At the first sign of abnormal behavior stop and get out.
25. If you must be at an open house alone, let prospects that enter the house know that someone else is expected to show up at anytime.
26. Carry a cellular telephone and a whistle, shriek alarm or pepper spray.
27. Use the buddy system when showing properties.
28. At the office, make sure areas around doors; windows and particularly the parking area are all well lit.
29. If you are working late at the office, try to have someone present. If this is not possible, make sure someone else knows where you are and let a family member know when you expect to be home.
30. Try to visualize yourself in an emergency situation. Think about what you might do in various circumstances. Being prepared by reviewing your options before you get into a potentially dangerous situation may save you precious moments in that situation.

**REMEMBER!**  
**NO sale is worth risking your life over!**

## **“Blue File”**

Each individual, agents and employees, within each office should be trained in the purpose and use of the “Blue File” a distress signal the Committee on Agent Safety strongly recommends. Individuals include all employees, not just agents. This distress signal is intended to seem harmless to the potential criminal yet send an alarm to those that know what it is. It is important to remember that this distress code should remain private to the real estate industry and not discussed with clients or the media.

By now each agent had read this Guidebook and should be familiar with the safety suggestions it sets forth. There is always a possibility, however, that no matter how careful you are; a potentially dangerous situation may arise. Throughout Guidebook we suggest always using the “buddy system.” Always have someone, whether it is a co-worker, friend, relative, or office employee, know when and where you are at all times when conducting business. Your contact does not have to be the same person all the time, only someone that can be reached during your out on business. The **Agent Itinerary** in this Guidebook is designed specifically for this purpose. Using it and becoming familiar with “Blue File” could save your life. Here’s how it works:

In the course of showing property or hosting at open house at 1234 Main Street. You become suspicious or aware of potential danger. You want to call someone, but don’t want to aggravate a potentially harmful situation. Explain to the individual you are missing an important disclosure form. Call your “buddy’s number and say, “Can you get the disclosure out of the blue file on 1234 Main Street for me? Thanks, I’ll wait for you to call right back.” Your “buddy” has now been notified that you need help at 1234 Main Street and should be phoning the police. Get out of the house and out of harm’s way.

**“Blue File”**  
**Learn it, know it, use it!**

# Agent Safety Guidebook

## Use of Forms

Each agent should have a copy of this Guidebook and its accompanying forms. The key to making a program like this one work is cooperation. Cooperation between member offices, agents and the public enforces a commitment to our agents as well as to the public we serve. We are already a work force encumbered with a great deal of paperwork, but using these forms religiously, just as we do those forms we have been required to use, will soon become habit.

Each agent should complete the **Personal Data Form**. His or her office should keep one copy and one copy placed in a general file accessible to each member of the office. Perhaps the most controversial part of this form is credit card information. Oftentimes victims' personal items are stolen in an assault. Credit card information will help track down criminals more quickly. In addition, include a recent photograph as an attachment to this form.

The **Agent Itinerary** is essential when the company is faced with an emergency involving the agent. Agents should let their office or another contact persons know when they are leaving for an appointment, where they are going and approximately when they will be back. Should any of this information change; it is the agent's responsibility to inform their office of their contact person. When there is an assault, it is imperative that law enforcement officials be notified as soon as possible. This form will help in that effort.

The **Prospect Identification** form should accompany the Agent Itinerary. The use of this form may make our prospects hesitant at first. Explain to prospects that this is part of a program set forth by the North Shore-Barrington Association of REALTORS®. It will instill in them we are a professional organization committed to our and the public's safety. Will its use stop all potential assaults? Probably not, but it may deter those individuals than plan their assaults.

We have developed an outdoor sign included in this packet designed to prepare visitors to show a picture identification card before entering your open house. Securing this type of information before an individual comes into the home, particularly if the house is vacant, will not only serve to enhance your confidence, but again, it is a form of security for your listed clients. The accompanying open house poster is designed to be displayed in a conspicuous place near the guest register. It recommends visitors sign in and asks that they call the North Shore-Barrington Association of REALTORS® if they have any questions or concerns.

# Prospect Identification Form

The information requested is being asked as a part of the North Shore-Barrington Association of REALTORS®. Agent Safety Program and supported by local law enforcement officials. Your cooperation and support of this program by supplying us with information is greatly appreciated. If you have any questions regarding this program, please contact the North Shore-Barrington Association of REALTORS® at (847) 480-7177.

Prospect's Full Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

Home Telephone: \_\_\_\_\_

Please complete the following if you are from out of town:

Local Address: \_\_\_\_\_

Local Telephone: \_\_\_\_\_

Vehicle Information:

Year, Make and Model: \_\_\_\_\_

Color: \_\_\_\_\_

License Plate Number and Issuing State: \_\_\_\_\_

Please list two references we may contact about your anticipated move:

1) Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

2) Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

I (we) hereby attest that the above information provided is true and accurate and may be used for verification purposes.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Agent \_\_\_\_\_ Date \_\_\_\_\_

Please attach a copy of driver's license(s) to this form.

# Agent Itinerary

Agent: \_\_\_\_\_

Date: \_\_\_\_\_

Prospect Name(s): \_\_\_\_\_

Vehicle Agent is Driving: \_\_\_\_\_

Meeting Prospect at:

Office @ \_\_\_\_\_ a.m./p.m.

First Showing @ \_\_\_\_\_ a.m./p.m.

Other@ \_\_\_\_\_ a.m./p.m. Location: \_\_\_\_\_

Scheduled Showings: (use additional sheets as necessary)

Full Address: \_\_\_\_\_ Listing Office: \_\_\_\_\_

Full Address: \_\_\_\_\_ Listing Office: \_\_\_\_\_

Full Address: \_\_\_\_\_ Listing Office: \_\_\_\_\_

Full Address: \_\_\_\_\_ Listing Office: \_\_\_\_\_

Full Address: \_\_\_\_\_ Listing Office: \_\_\_\_\_

Full Address: \_\_\_\_\_ Listing Office: \_\_\_\_\_

Full Address: \_\_\_\_\_ Listing Office: \_\_\_\_\_

Full Address: \_\_\_\_\_ Listing Office: \_\_\_\_\_

Full Address: \_\_\_\_\_ Listing Office: \_\_\_\_\_

Additional Stops:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other Comments:

\_\_\_\_\_  
\_\_\_\_\_

Final Destination:

Office @ \_\_\_\_\_ a.m./p.m.

First Showing @ \_\_\_\_\_ a.m./p.m.

Other@ \_\_\_\_\_ a.m./p.m. Location: \_\_\_\_\_

# Agent Personal Information

Full Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Business Telephone: \_\_\_\_\_

Cellular Telephone: \_\_\_\_\_ Pager: \_\_\_\_\_

Driver's License Number and Issuing State: \_\_\_\_\_

Vehicle Data:

Vehicle 1

Vehicle 2

Make: \_\_\_\_\_

Model & Color: \_\_\_\_\_

VIN#: \_\_\_\_\_

License Plate/State: \_\_\_\_\_

Two Emergency Contacts:

1) Name: \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

Home Telephone: \_\_\_\_\_

Work Telephone: \_\_\_\_\_

2) Name: \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

Home Telephone: \_\_\_\_\_

Work Telephone: \_\_\_\_\_

Credit Card Information:

Card Name: \_\_\_\_\_ Card Number: \_\_\_\_\_

Card Name: \_\_\_\_\_ Card Number: \_\_\_\_\_

Card Name: \_\_\_\_\_ Card Number: \_\_\_\_\_

Card Name: \_\_\_\_\_ Card Number: \_\_\_\_\_

**Dates This Form Was Updated (office use only)**

\_\_\_\_\_  
\_\_\_\_\_

# Welcome!

Be prepared to present a photo ID  
before entering the property.

Thank you.



A program developed by the Springfield Association of REALTORS® Committee on  
Agent Safety

In cooperation with local law enforcement authorities.

# Welcome!

Guest registration is recommended by the  
Committee on Agent Safety,  
North Shore – Barrington Association of  
REALTORS®.



A program developed by the Springfield Association of REALTORS® Committee on  
Agent Safety

In cooperation with local law enforcement authorities.

# Welcome!

Please take a moment and sign our open house guest register. This is a recommendation as set forth by the North Shore – Barrington Association of REALTORS®, Committee on Agent Safety.

If you do not wish to be contacted by the hosting agent, please place a check mark after your name on the guest register.

The Agent Safety Program is designed to promote a safer working environment for our REALTOR® community. Client listed in our Multiple Listing Service (MLS) also benefit as a result of this program.

We invite you to call the North Shore – Barrington Association of REALTORS® at (847) 480-7177 if you have any questions or concerns about the Agent Safety Program

Thank you for you cooperation.



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