

# Office Safety Action Plan Worksheet

## Action Plan Worksheet

Use the table below to help improve your agents' safety on the job. The left-hand column lists safety items and policies that you can buy or implement. The "Suggestions" column lists ways to supply or implement the items and policies. Use the remaining columns to identify who'll provide the safety measure. For example, if you intend to offer company-sponsored safety training for the agents, place a check mark in the "Company" column in the self-defense course row. If training is a component of company policy, place an additional check mark in the "Policy" column. If a self-defense class is recommended, but will be the agents' responsibility, check the "Agent" column.

Use the completed worksheet during the sales meeting to update your agents about your company's safety policy. Or customize your own version with the blank worksheet.

Item/Policy	Company	Agent	Policy	Suggestions
Self-Defense Course				Can be reimbursed by the broker or hire a consultant to provide in-house training at an additional cost. Check with your local police department to see if they offer courses or have suggestions.
Mace/Pepper Spray				Can be provided by broker. <b>NOTE:</b> Review local and state laws regarding the legality of these items before purchasing.
Call-in Policy				Ask agents to call office at specific times. See information on Mobile Callback on the REALTOR VIP® Program Resources sheet.
Open House Procedures				Create an open house set-up procedure, including such items as unlocking all deadbolts, checking escape routes from the house and back yard, and placing a business card in the cupboard with date and time on the back.
New-Client ID Policy				Create procedures, policies, or forms to verify prospects' identification. Require all agents to meet prospects in the office on a first visit; request a piece of identification to be copied and placed on file with their information.
Property Ownership Verification				Establish procedures, such as checking county property records, so agents verify that people who claim to own property are in fact owners. Avoid a situation where a caller claims to be a seller, but intends to lure an agent to a vacant house or remote location.
Review Agent's Collateral Material				Create guidelines to encourage agents to eliminate personal information (phone numbers, addresses) from their business cards and collateral materials and to eliminate descriptions, such as "quiet, secluded street; vacant property" from ads.
10-second Rule Handout				Encourage agents to post the 10-second rule in a prominent place and on the back side of their business cards.
Itinerary Policy				Agents should leave a daily itinerary with the receptionist or in a pre-determined place. Minimally, this should include contact information and destinations.

Source: REALTOR® Magazine Online

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