Standard Procedure

Purpose:

To outline the step-by-step process an agent should follow to plan, promote, host, and follow up on a successful open house that supports the seller’s goals, maintains professional standards, and generates high-quality leads.

Procedure:

1. Preparing for the Open House

Begin planning the open house 3 to 5 days in advance. Contact the seller to confirm the date, time, and any specific instructions regarding the home. Review your open house process with them, including preparation steps, marketing efforts, and expectations for feedback.

Prepare a Comparative Market Analysis (CMA) and print a list of recent sales in the area. Create supporting documents, such as a school map, neighborhood feature sheet, and builder background information (if applicable). These materials add context and credibility during the open house.

Ensure the listing is live and accurate on Realtor.ca. Schedule the open house through your MLS system and confirm the date and time are publicly visible.

Promote the open house on your social media platforms and record a short video invitation. This should be posted no later than 48 hours before the event. If possible, book a nearby, similar property for private showings immediately following the open house. This gives serious buyers an immediate next step.

Prepare your materials: open house signs, feature sheets, a sign-in method (tablet or form), Tim Hortons gift cards (optional for neighbours), and printed sheets of comparable properties. Invite a mortgage broker or have a financing information sheet ready for buyer prospects.

Remind your seller to tidy the space and remove or secure all valuables and medications before the event.

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2. Day of the Open House

Arrive at least 45 minutes early. Turn on all lights, ensure the home is clean and tidy, and confirm pets are secured or removed.

Set up your open house signage in high-visibility areas, including directional signs leading to the property. Ensure your feature sheets, comparable listings, and sign-in tools are ready at the entrance.

Door knock nearby homes to invite neighbours, offering a small token of appreciation if appropriate. Verify the open house is correctly displaying on Realtor.ca and other platforms.

If refreshments are being served, ensure they are neatly presented and allergen-aware. Set up your workspace with a laptop or tablet for CRM access, lead input, or digital sign-in. Dress professionally and prepare mentally for interaction — remember, you are representing both the listing and yourself.

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3. Hosting the Open House

Greet every guest at the door and ensure they sign in before exploring the home. Ask open-ended questions to learn about their needs, timeline, and current real estate situation. Be mindful not to press too hard, and keep all visitor information confidential.

Offer additional resources such as your CMA, neighbourhood information, or details on similar properties. If a visitor seems interested, suggest a showing of the pre-booked similar listing nearby. Take mental or written notes on promising leads.

Maintain a professional, welcoming presence throughout. Ensure the property remains secure, clean, and safe at all times.

4. After the Open House

At the conclusion of the open house, conduct a walk-through to ensure the home is returned to its original condition. Turn off all lights and secure all doors and windows.

Call the seller to provide a full report on attendance, feedback, and any interested parties. Gather your signs from the area promptly.

Within 24 hours, follow up with all attendees. Prioritize leads based on engagement and buying timelines. Enter contacts and notes into your CRM with proper tagging for future nurturing.

If any attendees expressed serious interest, coordinate a follow-up showing, introduce a mortgage broker, or begin the offer process as appropriate.

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TRESA Compliance Reminder:

All open houses must be conducted in accordance with TRESA (Trust in Real Estate Services Act) guidelines. If you are the designated listing agent, remember that you are in a client relationship and must always act in the best interests of the seller. If conversations begin to shift toward providing advice or services to a buyer, you must present them with the **RECO Information Guide** to clarify the nature of the relationship.

If you are not the designated listing agent but are hosting the open house on behalf of the brokerage, you are still providing a service to the seller. In this case, you may also present the RECO Information Guide to visitors to maintain transparency and compliance.

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