Open Houses and Buyer Conversion

Prepare an open house that welcomes visitors, presents the property professionally, and begins useful conversations. Then follow through on those conversations so people know they can rely on you when they need help.

This guide takes you from planning with the seller through preparation, visitor conversations, agency questions, prompt follow-up, and long-term relationship building. Buyer conversion means helping an interested person take an appropriate next step toward becoming a client. It requires understanding, trust, and the proper representation process.

How to use this guide

Read the chapters in order. Complete each practical activity and compare your response with the suggested answer. Before your next event, complete the readiness plan and worksheets. Use the sample language as a starting point and adapt it to your role, the visitor, and the actual circumstances.

Use current company procedures and broker guidance for safety, registration, agency forms, and transaction requirements. The form references in this guide identify the materials named in the training; they do not establish a universal timing rule for every visitor interaction.

Your route through the guide

1 Set goals and seller expectations

2 Prepare the property materials and safety plan

3 Welcome visitors and understand their goals

4 Guide interested buyers to an appropriate next step

5 Complete follow up within 24 hours

6 Maintain relationships and review your pipeline

Your next open house action plan

Worksheets and readiness review

What you will create

A seller discussion plan, a preparation checklist, a natural conversation approach, a visitor follow-up record, and a repeatable review process. These tools should help you deliver a positive experience and keep the promises you make during the event.

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1 Set goals and seller expectations

An open house gives people an opportunity to see a property and meet a professional they may turn to for advice. Visitors may be active buyers, future buyers, sellers, neighbors, investors, referral sources, or casual visitors. Each deserves a respectful experience even when no immediate transaction results.

Define success before the event

Choose goals you can influence: present accurate information, welcome visitors, understand their questions, and complete useful follow-up. New buyers, future listings, referrals, community connections, and appointments may develop, but attendance or immediate sales alone do not describe the event's value.

For example, a neighbor who has no plans to move may appreciate a clear market explanation and later introduce a friend. A buyer who is not ready may return with questions months later. These possibilities support patient service; they do not guarantee future business.

Discuss the plan with the seller

Before the open house, discuss the date and time, marketing plan, showing procedures, security considerations, visitor registration, and property preparation. Explain what will happen, who may attend, and the benefits and limitations of opening the home to visitors. Avoid promising a particular attendance level, offer, or sale.

Confirm access arrangements and the practical steps for preparing and securing the property through the company's process. If you are hosting another agent's listing, coordinate the details and your responsibilities with the listing agent before making commitments to the seller.

Prepare for questions about the property

Review property features, seller disclosures, recent updates, comparable sales, neighborhood information, and likely questions. Visitors may ask about taxes, utilities, transportation, local amenities, schools, condition, or market activity. Know where you will find accurate information and distinguish verified facts from assumptions.

If an answer is uncertain, say that you will check. Record the question and the promised response. Preparation includes recognizing the limits of your information rather than guessing to keep the conversation moving.

Use the Team Brokerage support

The company supports agents through transaction coordination, administration, compliance oversight, broker guidance, file management, and RBO transaction management. Use that support and confirm responsibilities. Your preparation, hospitality, communication, and follow-through still shape the visitor and seller experience.

Put it into practice

Write three goals for your next open house and prepare a short seller discussion agenda. Include what you can explain confidently, what you need to confirm, and which responsibilities you must coordinate with the listing agent or broker.

Check your understanding

An event produces no immediate offer but several useful conversations. How should you assess it?

Suggested answer: Review whether visitors received good information, whether relationships began, and whether there are appropriate next steps. An immediate transaction is only one possible outcome.

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2 Prepare the property materials and safety plan

Arrive early enough to check the property, arrange materials, review safety concerns, and be ready before the first visitor arrives. A calm start gives you more attention for people and reduces avoidable distractions.

Prepare the home with care

Confirm that the property is clean, well lit, comfortable, and accessible. Follow agreed instructions for opening blinds, turning on lights, adjusting temperature, and removing clutter. Coordinate securing valuables and removing sensitive information before visitors arrive. The purpose is to let visitors understand the home and imagine how it might fit their needs.

Bring accurate and appropriate materials

- Property flyers and the MLS information sheet, checked against current property information.
- Seller disclosures when appropriate, together with the approved process for providing them.
- Agency materials identified in the company: Real Estate Disclosure Notice [501] and Unrepresented Persons Notice [502], for use as circumstances and company procedures require.
- Business cards, note-taking materials, and the approved digital or paper visitor registration system.

Keep materials organized so you can answer questions without losing track of the conversation. Confirm how to handle agency questions before hosting, especially if you need guidance on your role or the correct forms.

Market the event and plan signage

Use approved channels such as the MLS, company website, social media, email, neighbor invitations, and community groups. Present accurate event details and property information. The aim is awareness and a professional invitation rather than exaggerated claims.

Use visible, professional signs consistent with company branding. Place them only where permitted and where they direct visitors effectively, such as allowed intersections, entrances, turns, and the property. Plan to remove them promptly after the event.

Review safety before opening

Follow company safety policies and review exit routes, visitor flow, security concerns, and emergency contacts. Keep your phone charged, keys accessible, and personal belongings secure. Document visitors appropriately and remain aware of the surroundings throughout the event.

If something feels wrong, take appropriate action under the safety plan and report concerns promptly. Do not let a possible business opportunity override your safety judgment. Know whom you will contact and how you will respond before you need to act.

Put it into practice

Prepare a checklist with three groups: property readiness, materials and marketing, and safety. Identify the owner and completion time for each unfinished item. Walk through the home and confirm that your plan works in the actual setting.

Check your understanding

You arrive and find sensitive seller information left in view. What should you do?

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Suggested answer: Address it through the agreed property preparation process before visitors enter. Protect the seller's information and involve the responsible person if you cannot resolve the issue yourself.

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3 Welcome visitors and understand their goals

Your first interaction should help visitors feel welcome, comfortable, and respected. Greet them naturally, explain the practical process, and allow room to explore. Remain available without following people closely or turning the visit into a prolonged sales presentation.

Begin with a simple welcome

You might say, "Welcome. Thanks for coming by. Please feel free to look around, and let me know if you have questions." If conversation develops, ask a natural opening question such as, "What brings you out today?" Listen to the answer before deciding what to ask next.

Explain registration transparently

Use the approved registration process and explain its purpose respectfully. Registration can support safety, follow-up, and understanding visitor needs. For example: "I ask visitors to register so I can provide information and follow up if you have questions." Make your explanation consistent with the actual event procedures.

A registration entry does not establish representation or tell you that someone wants every future marketing message. Clarify the information the person wants and the best way to provide it. If a visitor questions registration, respond calmly and follow the company procedure rather than inventing a rule at the door.

Ask questions that help you understand

Useful questions include, "Are you currently looking for a home?", "What areas interest you?", "Have you been searching for long?", and "Are you currently working with an agent?" Ask them as the conversation allows rather than delivering a checklist of questions immediately.

Specific questions about financing, taxes, commute, condition, timing, offer strategy, or closing costs may suggest an active search. They are reasons to listen carefully, not proof that someone is ready to become your client. Let the visitor describe their plans.

Give neighbors and casual visitors equal respect

A neighbor may want to understand the market or see a nearby home. Try, "Thanks for stopping by. Have you lived in the neighborhood long?" If they express interest in values or future selling plans, offer relevant information without launching into a listing presentation.

A casual visitor may have no immediate real estate need. A pleasant conversation is still worthwhile. Avoid ignoring people because they do not appear ready to transact or treating every guest as though they have identical goals.

Put it into practice

Practice a greeting, a registration explanation, and three open-ended questions. Ask a colleague to play an active buyer, a neighbor, and a casual visitor. Change your next question based on each response rather than repeating a fixed presentation.

Check your understanding

A visitor wants to look around before talking. What is the appropriate response?

Suggested answer: Give them space and remain available, consistent with event procedures and safety awareness. Respecting their pace can make a later conversation more comfortable.

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4 Guide interested buyers to an appropriate next step

A helpful conversation can lead to a useful next step when the visitor wants one. That step may be receiving information, arranging a consultation, discussing representation, or simply knowing how to reach you. Let the visitor's needs and your actual role guide the conversation.

Understand motivation and timing

Ask what the person hopes to accomplish and what questions are most important now. Someone actively searching may need a focused conversation about their plans. A future buyer may need education about the process. A neighbor considering a sale next year may value local market information.

Offer a specific contribution you can provide accurately: a property detail, a market explanation, an educational resource, or an introduction to a relevant professional. If you promise information, agree on how and when to send it.

Handle representation questions carefully

If a visitor asks, "Do I need an agent?" or "Can you help me buy a home?", begin with education: "I would be happy to explain how representation works and answer your questions." Be clear about your current role before offering individual advice or discussing a new relationship.

Agency discussions and forms must follow company policy, applicable Connecticut requirements, and the circumstances of the relationship. Have the Real Estate Disclosure Notice [501] and Unrepresented Persons Notice [502] available as directed. Ask the broker when you need guidance; do not infer that one form or script covers every open house interaction.

Ask whether the visitor is already working with an agent. Respect existing representation and use broker guidance before taking steps that could conflict with it. A sign-in sheet, friendly exchange, or request for property information does not by itself make a visitor your client.

Offer a next step without pressure

For an interested visitor, you might say, "Would a separate conversation about your search be useful?" For someone seeking information, try, "I can send the details we discussed. What is the best way to reach you?" For someone who is simply browsing, a courteous closing is enough.

You can end with, "It was good meeting you. Please let me know if questions come up." A successful interaction does not require an appointment. The visitor should leave understanding what you will do and feeling free to decide what help they want.

Recognize gradual progress

People may move from stranger to acquaintance to trusted relationship to client over time. That progression depends on their circumstances, your service, and the appropriate representation process. Avoid treating patience as a reason to ignore follow-up or conversion as permission to pressure someone.

Put it into practice

Write an appropriate next-step invitation for an active buyer, a future buyer, and a neighbor. Then identify what you must confirm before discussing representation with a visitor who asks for help buying.

Check your understanding

A visitor says they already have an agent but asks about the property. What should you do?

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Suggested answer: Provide appropriate property information within your role, respect the existing relationship, and seek broker guidance before proposing services that could conflict with representation.

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5 Complete follow up within 24 hours

The company recommends following up within 24 hours. Prompt contact helps people remember the conversation and demonstrates that you keep commitments. Reserve time for this work before the event so follow-up is part of your plan.

Record the conversation accurately

Enter meaningful visitor conversations into the approved CRM, checking for an existing record first. Include the person's name, available phone and email, whether they are a buyer, seller, neighbor, investor, or referral source, relevant notes, and a follow-up date. Keep personal information respectful and relevant.

Record the area of interest, stated timeframe, questions, financing plans if shared, existing representation if discussed, communication preferences, and anything you promised. Separate what the person actually said from your interpretation. If no next contact was agreed, record that accurately.

Send the information you promised

A short message can acknowledge the visit: "Thank you for visiting the open house today. It was nice meeting you. Here is the property information you requested. Please let me know if I can answer any questions." Refer to the actual conversation rather than sending an unrelated sales pitch.

Email may include a thank-you, property details, relevant resources, similar homes when appropriate, and an invitation to stay connected. A call may be appropriate when it fits the relationship and stated preference. Use the channel the visitor expects and review accuracy before sending.

Match the next action to the person

An active buyer may want a separate conversation soon. A future buyer may prefer a useful guide and contact next month. A neighbor may only want occasional neighborhood information. Ask what would help instead of automatically enrolling everyone in the same follow-up sequence.

If the person does not respond, use a reasonable approach consistent with the conversation and company procedures. Do not interpret silence as interest or keep increasing pressure. Honor requests to stop or change communication.

Check that follow up actually happened

Review whether the requested material was sent, questions were resolved, and agreed appointments or next actions were recorded. Mark a task complete only when its status reflects what happened. Reschedule unfinished research with an honest note and a clear completion date.

Avoid common failures: losing notes, talking without listening, overlooking neighbors, treating every visitor the same, and delaying promised information. A personal response to the specific conversation is more useful than a quick generic message alone.

Put it into practice

Draft a 24-hour message for one buyer and one neighbor. Create a sample CRM record with the promised information, contact preference, and next action. Reserve a follow-up block after your next event and review all open commitments during it.

Check your understanding

Does the 24-hour recommendation mean every visitor should receive the same campaign?

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Suggested answer: No. Follow up promptly in a way that fits the conversation, needs, and preferences. Complete specific promises and agree on suitable future contact.

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6 Maintain relationships and review your pipeline

Some visitors will act soon; others may need months or years. A pipeline is a collection of relationships at different stages. Keep each person's actual needs and next step visible rather than assuming that everyone moves through the same timetable.

Use the company follow up framework

- Active buyers: weekly contact with useful market updates, listings, showings, advice, or strategy appropriate to your role and relationship.
- Future buyers: monthly contact with education, financing resources, neighborhood information, or market reports.
- Long-term buyers: quarterly contact with newsletters, market trends, or helpful resources.
- Neighbors: relationship-based contact such as local market information, neighborhood news, home value information, or community invitations when welcome.

These are planning recommendations. Adapt them to the person's preferences, existing representation, and circumstances. Urgent questions need timely attention rather than waiting for the next scheduled weekly or monthly contact.

Keep long term contact useful

Market reports, educational content, birthday greetings, home anniversaries, community events, and coffee meetings can support a relationship when relevant. Avoid maintaining visibility at any cost. Review whether the person still finds the contact useful and adjust when circumstances change.

Organize your pipeline around real information

You might use Ready Now for active buyers, Soon for people who describe a likely upcoming move, Future for long-term relationships, and Referral Sources for past clients, professionals, or community contacts who introduce others. Record the reason for the category and the next action.

Update stages when you learn something new. A person who postpones a move needs a revised plan. A neighbor who asks for a selling consultation may need a different next step. A referral source may also be a potential client; use categories to organize work without losing the individual relationship.

Measure more than attendance

Review conversations, new CRM contacts, completed follow-up conversations, future appointments, referrals, and community visibility. Also ask whether you helped people and kept commitments. Separate event activity from later results so you can understand how opportunities develop over time.

After each event, identify one preparation improvement, one conversation improvement, and one follow-up improvement. Review what visitors actually asked and use it to prepare better information next time. Avoid promising that a particular attendance or contact total will produce a fixed number of clients.

Put it into practice

Create a sample pipeline with an active buyer, a future buyer, a long-term buyer, and a neighbor. Give each a reason for the category, a useful next action, and a review date. Decide how you will track whether event follow-up was completed.

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Check your understanding

A future buyer says they have postponed moving indefinitely. How should your plan change?

Suggested answer: Update the record and discuss whether any future contact would be useful. Revise the frequency and content rather than continuing a campaign based on outdated plans.

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Your next open house action plan

Use this sequence to turn the guide into a repeatable event process. Complete the preparation and safety steps under company procedures, then adapt conversations and follow-up to each visitor.

Before you commit to the event

Confirm the property, date, time, access, and hosting responsibilities. Discuss seller expectations and the benefits and limitations of the event. Identify who handles marketing, property preparation, security arrangements, and questions requiring the listing agent or broker.

Review the property information and your role. Confirm the registration procedure and agency materials. Resolve uncertainties about forms or visitor interactions before the event rather than improvising an answer during a sensitive conversation.

Before the first visitor arrives

Arrive early, prepare the home as agreed, secure valuables and sensitive information through the approved process, arrange materials, and check signage. Review exits, visitor flow, emergency contacts, phone charge, keys, and the safety plan.

Prepare a short welcome and registration explanation. Identify common property questions and reliable sources for answers. Have a way to note questions and commitments without relying on memory.

During the event

Welcome visitors, explain the process, and allow room to explore. Ask natural questions and listen. Recognize neighbors, future buyers, and casual visitors as people worth helping. Answer within your knowledge and role, and record what you need to confirm.

Clarify existing representation when relevant. Use the appropriate agency process and broker guidance. Offer an optional next step that fits the visitor's interest, and agree on any promised information and contact method.

At the end of the event

Follow the agreed procedures for checking and securing the property, accounting for materials and keys, and removing signs promptly. Report any concern through the company process and coordinate the seller or listing-agent update as arranged.

Organize notes and enter meaningful conversations in the CRM. Schedule the promised actions and reserve time to finish them. Protect visitor information when handling paper and digital records.

Within 24 hours and afterward

Complete the company's recommended prompt follow-up and send requested information. Record outcomes and next actions. Place continuing relationships in an appropriate follow-up plan and review it as their needs change.

Evaluate the event using conversations, service, follow-through, appointments, referrals, and later opportunities. Choose one concrete improvement for the next event and add it to your checklist.

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Worksheets and readiness review

Event preparation record

Property and event date: _____

Hosting role and listing agent contact: _____

Seller expectations and agreed arrangements: _____

Marketing signage and materials owner: _____

Registration and agency procedure confirmed with: _____

Safety plan emergency contacts and unresolved concerns: _____

End of event security and reporting responsibilities: _____

Visitor conversation and next action

Name and preferred contact method: _____

Visitor needs timeframe and representation discussed: _____

Question or information requested: _____

Promised action and completion time: _____

CRM category next contact date and reason: _____

Event review

Meaningful conversations: _____ New CRM contacts: _____ Follow ups completed: _____

Appointments or other next steps: _____

What helped visitors and what should improve: _____

Open commitments owner and due date: _____

Apply your judgment

Scenario 1: A visitor asks a property question you cannot verify. What should you do?

Suggested response: Explain that you need to check, record the question, confirm the appropriate source, and agree on how to provide the answer. Avoid presenting a guess as a fact.

Scenario 2: A neighbor says they are only curious and have no plans to sell. How should you respond?

Suggested response: Welcome the conversation and offer relevant information if desired. Respect their stated plans and avoid turning the visit into an unsolicited listing presentation.

Scenario 3: Something during the event raises a safety concern, but the visitor seems interested in buying. What takes priority?

Suggested response: Follow the safety plan, take appropriate action, and report concerns promptly. A possible opportunity should not override safety judgment.

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