 

**Open House Timeline Tracking Checklist**

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| **Timeline** | **Activity** | **Assigned**  | **Completed** |  |
|  |  |  |  |  |
| 2 Weeks Before  |  |  |  |  |
|  | Get written confirmation for the date and time from Seller  |  |  |  |
|  | Coordinate the date and time with Lender Partner to do the delivery/door knocking of the 10/10/20 activity – Help Us Pick Your New Neighbor  |  |  |  |
|  | Set up Brochures/Flyers – Do you know what your neighbor did last night? |  |  |  |
|  | Set up the Event on Facebook (Paid “Boost” Ad)  |  |  |  |
|  | Shoot a short video announcing the Open House and post on Facebook Biz Page  |  |  |  |
|  |  |  |  |  |
|  | Put messaging on the IVR System announcing the open house  |  |  |  |
|  |  |  |  |  |
|  | Place Open House info on R.com and other website portals, including your own website under OPEN HOUSES  |  |  |  |
| **1 Week Before** |  |  |  |  |
|  | Remind/Confirm the date with Seller |  |  |  |
|  | Put up OPEN HOUSE Sign Burst on For Sale Sign |  |  |  |
|  | Set the date with the seller for the neighbors private “sneak peek” open house Invitation to neighbors only  |  |  |  |
|  | Deliver/Send/Knock the private invitations to the 10/10/20 neighbors around the subject property  |  |  |  |
|  |  |  |  |  |
|  | Develop 100+ flyers for the properties around the subject announcing the open house dates and times and include IVR number  |  |  |  |
|  |  |  |  |  |
|  | Set up your open house kit (separate checklist) |  |  |  |
|  |  |  |  |  |
|  | If using a sign placement company, order the additional directional and confirm date and address of the property (OpenHouseHelpers.com)  |  |  |  |
|  |  |  |  |  |
|  | Prepare a list of other available properties for sale that are slightly above and below the price range of the subject property  |  |  |  |
|  |  |  |  |  |
|  | Prepare a list of other open houses in the area for prospects (from MLS, etc.)  |  |  |  |
|  | Confirm with lender to have the FAQ’s report for the difference between Pre-Qualification and Pre-Approval and What you need to know about the new TRID timeline |  |  |  |
|  |  |  |  |  |
|  | Set up your sign in sheets for walk in prospects  |  |  |  |
|  |  |  |  |  |
|  | Have available premiums with your name and contact information for give away items  |  |  |  |
|  |  |  |  |  |
|  | Confirm additional availability of staff for reception and for inside the premises (as needed)  |  |  |  |

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| **Open House Day**  |  |  |  |  |
|  | Place Signage and directional and Feather Open House Flags at property  |  |  |  |
|  | Set up outside reception area with draped table and refreshments  |  |  |  |
|  |  |  |  |  |
|  | Set up clipboards for visitors and/or electronic sign in [www.OpenHomePro.com](http://www.OpenHomePro.com)  |  |  |  |
|  |  |  |  |  |
|  | Have available a list of ALL open houses in the area |  |  |  |
|  |  |  |  |  |
|  | Show properties available that are priced slightly above and below the subject property for interested attendees  |  |  |  |
|  |  |  |  |  |
|  | Have lender partner prepare a TRID FAQ 1 pager |  |  |  |
|  |  |  |  |  |
|  | Offer a no obligation Annual Mortgage Fitness and/or Identity Theft Screening service by lender partner  |  |  |  |

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| **After Open House**  |  |  |  |  |
|  | Double check property to be sure all windows and doors are locked before leaving |  |  |  |
|  | Pick up all signage and remove open house rider from for sale sign |  |  |  |
|  | Connect with the seller for Open House Results Report  |  |  |  |
|  | Send/deliver Thank you notes to each of the 10/10/20 neighbors  |  |  |  |
|  | Send/Deliver Thank you note to any/all property owners where signage was placed near their property/yards |  |  |  |
|  |  |  |  |  |
|  | Enter all interested prospects in your CRM system according to their rating (A, B or C) |  |  |  |
|  |  |  |  |  |
|  | Set up Market Snapshot for MLS updating for similar properties for interested prospects  |  |  |  |
|  | Share list of attendees contact information with lender partner for contact about pre-approval services  |  |  |  |
|  |  |  |  |  |
|  | Schedule phone or email follow up with interested prospects  |  |  |  |
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