Speaker 1 ([00:00](https://www.rev.com/transcript-editor/shared/YrsdItBYfDMZB6utErbFKWn03O6MS2-aK7IeZXuu_10IpCsPgH_JdSgjXYAJ6FLIyitVRE1QvX75gTbcKcVhiqwoaw4?loadFrom=DocumentDeeplink&ts=0.21)):

You're tuning into Drive Within NAR, the Safety Series powered by Realtor Magazine. In partnership with the Realtor Safety Program, hear harrowing stories from real estate professionals who have faced danger in the field and expert advice on how to work safely. Get more safety tips at N ar.realtor/safety. While real estate pros know the importance of crafting a business plan if you consider creating a safety plan to mitigate their risk while on the job. But like a business plan, a safety plan is fundamental to your bottom line. After all, if something happens to you or your client, then you can't conduct business and you can't make money. Today I am joined by two real estate professionals who will share tips on creating and maintaining safety plans that have helped their businesses thrive. Miguel Carino is a broker with Allen Tate, realtors in High Point, North Carolina, and Susan Mertz is an agent with Keller Williams Capital Properties in Washington, DC and Tampa, Florida. Thank you both so much for joining me today. It's a pleasure. Thank you so much. Okay, let's start by asking the basic question, what is a safety plan? And tell me in each of your own words, why is it necessary for business? Let's start with you, Susan.

Speaker 2 ([01:14](https://www.rev.com/transcript-editor/shared/DjBJQWYIZd6toH3Lp9uAeDytLtlgP8zgsKtmzM4cWiX7gx8eAd8k_GV43STPpFjAS6EIBRuJzB3wDzTaGJgXCVcfcjI?loadFrom=DocumentDeeplink&ts=74.61)):

A safety plan for me, Tracy has always been to have someone else on my team know where I am so that I am never really at an appointment alone. If that person on my team isn't available, I generally as well have a family member or a close friend who knows where I am, especially if I'm meeting somebody for the first time. And then I also have kind of a code that I can text either of those folks to let them know if I'm in a dangerous situation that it's a little less obvious than making a phone call directly. That has always tend to work for me. Got it. And how about

Speaker 1 ([01:54](https://www.rev.com/transcript-editor/shared/sx0-6mFAD-IkeU-siZaPHBr8k4Rq1wBfkkBI8WDG5HFs6zBk5kYoJJDzoJj-K6fZ0EmK101HquwlcQUbfUPEG6Pn9Wo?loadFrom=DocumentDeeplink&ts=114.03)):

You, Miguel? What's a safety plan to you?

Speaker 3 ([01:56](https://www.rev.com/transcript-editor/shared/linfK5q-VhVqdtOasIEQikf2LzqtB8s-vbeC3yZu99kCN3jjC5x2ilrAVgRPVWNvx4Rgu1qXWV2mpKOYmxPBs-Hbu9s?loadFrom=DocumentDeeplink&ts=116.7)):

Well, to have a safety plan is very crucial for any business and in our real estate world, definitely because we need to take care of our own clients, we need to reduce those risks for them. And at the same time, for us, that's what I usually get in process when I am in the market showing properties. And today, for us it's very important no matter who you are, no matter if you're a male, no matter if you're a female, sometimes we think that we are male, we don't have that, but it's very important as a person, as a human being

Speaker 1 ([02:36](https://www.rev.com/transcript-editor/shared/7oGv5uknbl3stelGT1vPtJmUGfEDq6iTCz13L4RNR_l03ZEtqL4WjXJFT14uhHm71_i1NfAGIVtciJyBWm9fTIbBVR0?loadFrom=DocumentDeeplink&ts=156.96)):

Understood. And I am excited about today's program because I've been teaching real estate agents how to work safely forever. Well, it seems like forever for about 29 years. And one thing that I always talk about is having a safety plan. And a safety plan is like a business plan. It's a roadmap, it's a guide. And with the start of a new term or a new year, it's a perfect time for Asians, whether you're new or seasoned, to sit down and say, here's what my safety plan looks like. Now we want to talk a little bit about some of the most important items in a safety plan. So let's start out with the first part of any safety planning. Let's talk about that first meeting. What does your safety plan look like when you're talking about that first meeting, Susan?

Speaker 2 ([03:21](https://www.rev.com/transcript-editor/shared/B-q0LOx5PXLGoRO8LWzrYPSy0vEwloF1OA-bN5ZFl5WnDENKGf2ZrAhJuSWS2Px2fUvYu6XnDj2TVQjFn9XbkXhJx8w?loadFrom=DocumentDeeplink&ts=201.37)):

For a first meeting, I generally, it used to be a phone call first and then after the Covid and Zooms became such a popular way to meet people, a lot of times I'll do a phone call and a Zoom meeting, just especially if we've never met and it's say a cold lead versus a warm referral lead just so that we can feel like we've had that face-to-face meeting. So when we're meeting, whether it's generally for me in the office or a public space, like a restaurant of some sort or coffee shop so that there's other folks around so that we have kind of a rapport before we actually sit down and meet in person. And I also feel I don't meet anyone at a property first. We have an in-person meeting first, and then after that we can go straight to looking at homes. But I feel it's best for me and generally most real estate professionals to do something similar. So you don't get yourself in a situation where you're in a strange house with people that you don't really know.

Speaker 1 ([04:26](https://www.rev.com/transcript-editor/shared/gY8rA3OVL-VR-LNduRk8GOJ8C_n4TtPOgO7E5NwuZX8cggpXchzhUcumjiWp7fxkruvlvq88fK0fkW_vcV2nVADRmF0?loadFrom=DocumentDeeplink&ts=266.95)):

Okay. So it sounds like one part of your safety plan is that free the pre-show meeting. So that means you need to have a location. Are you meeting in the office? Are you meeting in a public place? Are you meeting virtually? Correct. One thing that I always remind agents about is if it's at a coffee shop, the whole point is to increase witness potential. That's the safety part of it. So if it's a super busy coffee shop and they don't know you, that defeats the purpose. So it needs to be a coffee shop where you are known. And that way the person who you're meeting with, just in case there maybe would be perpetrator, they know that they can be recognized. And I always stress that we all have industry partners who will happily allow you to use their conference room or their space to meet. Have you ever had to do that?

Speaker 2 ([05:12](https://www.rev.com/transcript-editor/shared/6FHUPR-Vdy2Zv4CiojkDRuz8czoJOeTKxV7iBgtl3hbSpOppLim5NM8vhiUEdG7Fmba8D7cZr9u74yWLQJYb50FFk3Y?loadFrom=DocumentDeeplink&ts=312.28)):

Yes. So I've used several other offices share their space, and that's always greatly appreciated. So that again, you have that feeling of being in the office. The only caveat I'll say with that is that if you're meeting someone for the first time on the weekend, there's not generally a lot of people in some of our offices. So again, I would prefer a coffee shop. I do understand the importance of going to somewhere local where they know you. And if you can't do that, then what you could possibly do is when you go to order your coffee for you and your guest or whatever, just introduce yourself to that person and say, Hey Jenny, so nice to see you today. We're here for a meeting. Could you get us a couple of coffees? Just to give that sense that they know you.

Speaker 1 ([05:58](https://www.rev.com/transcript-editor/shared/CTbqE1W2AEkQpwlpKJ4u-J3o5XNE-zLQIcdWdo1Zt_g1_ldzDOEqfAFAD3RL2-o7rkEST0Xlq3VaVOvc9oNd5nfVnX0?loadFrom=DocumentDeeplink&ts=358.67)):

Exactly. I like it. Okay. So Miguel, what about you? What is something that's in your safety plan, one of the first steps that you take when meeting either with a seller or a buyer?

Speaker 3 ([06:10](https://www.rev.com/transcript-editor/shared/3Tpo8dnHTI-FrzEEfbZUfclAdNVGZVDaF_3b6mCKxfDT_Z1KBPMJ9npFHmzwTt8TKk9PHj7gVV3ZiNbZB4R5A7u5Lf4?loadFrom=DocumentDeeplink&ts=370.25)):

Definitely it's going to be in place my communication protocols and also have my emergency contact. The communication protocols is because when we start meeting with the client, where it's going to be, definitely it's going to be my office and least I already know the people by phone or be in contact with them for many times. But that's the first thing. And the emergency contact is who is the people I'm going to call in case on a real emergency or risk that I going to be thus is going, gave me message the next follow steps in order to talk more safety with my clients.

Speaker 1 ([06:57](https://www.rev.com/transcript-editor/shared/iWb09Z797UCmjPsvCRj1XZd-B7MvmPEA1fWQCSzmA5VPJuOIxJNhgRipGQ9h_dNpIr66A3ZPP9qE_JiI0OMH3O6J_EA?loadFrom=DocumentDeeplink&ts=417.14)):

Okay, and that makes a lot of sense. Now, Miguel, tell me, do you use any kind of app or any technology at any point during the sales process?

Speaker 3 ([07:05](https://www.rev.com/transcript-editor/shared/sBlxURysTpACxZafBCsfgcUiV7YT3e_vsrWqaiw7u45n07RHGveGpBjhIaCi_DeSIDMc7QfBZ0pNL700LWpyavFFkMg?loadFrom=DocumentDeeplink&ts=425.45)):

Yes. In our region, we got a few apps through our MLS system. One is showing time that we had a beacon o that we can actually start the beacon when we are in someplace remote place to show the property. And also we have a for is a new app that we have available and we recommend it in our side for safety purpose. So those are the apps that we recommend and most people is using it today.

Speaker 1 ([07:40](https://www.rev.com/transcript-editor/shared/Gi0PGIKKDOIZnjxGwBncw24eLdyf5QD2ImY1rwdxFD_uYzm97v60jgYqOlNknbmpyDH7P1XGJ44XVSfGbWzhTxcMT7E?loadFrom=DocumentDeeplink&ts=460.13)):

Right. Keep in mind that NAR does not endorse any or recommend any specific product or tool, but you're to use one that you're comfortable with and one that you know about. And you can certainly go to n.realtor/safety to get more information. And using a tool like for worn is a great way to do a background check, criminal background check. If you do it for one, do it for everyone. For

Speaker 3 ([08:03](https://www.rev.com/transcript-editor/shared/Kbn4U3RIyUiQi0ygbFtGhGywv4tEq2AwVeaWlOq7MLumHgmHIoRfm8CmFfVfAymIAdW2-25LguIbATyI_rEVZCm5lJM?loadFrom=DocumentDeeplink&ts=483.35)):

Everyone,

Speaker 1 ([08:04](https://www.rev.com/transcript-editor/shared/_HOSsvbSFjxKL52wexHUE_REXzXXwsgX40WIJlK27pt9lXbx1A--I33Op7EOkDKv82nNZDKSzfWXeIpUOcUXSjxUP9g?loadFrom=DocumentDeeplink&ts=484.01)):

Right? So that makes it part of your safety plan anyway. Every single client, Susan, sounds like you're familiar with that one.

Speaker 2 ([08:11](https://www.rev.com/transcript-editor/shared/b27pQajD5XctI-qYC7MbwNKjYsUiJbSECnkOFUL2o-Ym1l57I8mpKcLIJB1Gp71Kh0qqfCxdj7LX8YSG4f2bsGAuONs?loadFrom=DocumentDeeplink&ts=491.18)):

Yes, we use it here often. I love it just because we get so many phone numbers and phone calls and so it really helps me ensure that the person who is in contact with me is actually using a number that's associated with them. And it is sometimes, especially as a woman going and meeting, say if I'm just meeting a man versus a couple or a family, I like to just see the criminal background, but I do do it on everyone that is not part of my regular database, just especially if we're brand new meeting, whether they were referred to me by another client or met at an open house or something along those lines. Just for me, it just gives me that little bit of extra peace of mind to know that we're not walking into an unsure situation.

Speaker 1 ([09:01](https://www.rev.com/transcript-editor/shared/T-bN3DZhtDGvSPvRlZekd6U341vxSZ6u-xeTAgMFZUJpaypWIbRXpz7BU8UwovhrjbgJWfQRy2l93oIzvi4p27d_Mr8?loadFrom=DocumentDeeplink&ts=541.38)):

Exactly. And keep in mind what forewarn does is you enter an email address or phone number and it's going to give you a lot of data points including whether or not there have been any criminal convictions. But keep in mind that sometimes criminals can commit up to what 11 crimes before they're convicted. So just keep that in mind. And all convictions aren't created equally. Some of those convictions could be traffic related, so use the data and really study it and understand how to use it properly so that you stay out of trouble. And it also verifies, like you said, Susan, that it's a real phone number and it's tied to that person and not a burner phone, which would raise a red flag when we're talking about criminals. Criminals come in both genders, they do. So often we get comfortable. We think it's a couple, they're okay, or it's a lady, she's okay. I just say, remember Bonnie and Clyde? Okay. So always keep in mind that everyone needs to be checked out. And also let's talk a little bit about going to the properties. Miguel, what is your protocol when you arrive at a property to show and does it differ if it's a foreclosure or a distressed property as opposed to a regular residential property? What's your safety practice when you're showing clients?

Speaker 3 ([10:11](https://www.rev.com/transcript-editor/shared/PlV3qwiu_4jRD7Bt4i38q-0FmKyziyaEcNmvFEHiwfD3h0MoJzVbHRpIpv2NIAfjGzaVZSs6S1-qAy2F-N9Ccll6Zr8?loadFrom=DocumentDeeplink&ts=611.49)):

Definitely I'm going earliest 15, 20 minutes early and work around the property. I open the doors and lock any doors, any back doors, make sure everything looks safe, especially when it's foreclosures or vacant houses. If the house are open, usually I have to check if they have video cameras in the house to mention with my clients too. That's the best. And another, definitely another thing I check for my cell phone connection. If you have connection in that area in case an emergency, that's what always do.

Speaker 1 ([10:53](https://www.rev.com/transcript-editor/shared/PNd88d6tVzshmOpqefsTqnJrQofx-mRWi0dX1nKgjsDW_dg70pxomF5beqMkZEbyt7I12svUPJgEC0NYej4R4N6ZyKQ?loadFrom=DocumentDeeplink&ts=653.73)):

You cover all of the bases. And it sounds like it would be great if your fellow agents had a checklist so they could remember these items. Now, Susan, Miguel talked a little bit about his safety plan when dealing, when he's showing a property to buyers. Talk to us about your safety plan when dealing with sellers. Do you do anything different when you show up to that seller's house?

Speaker 2 ([11:15](https://www.rev.com/transcript-editor/shared/JyFDDgc0PYJmryhtco83QI-0V16jOBTpMVwNB_lQRysEnFep7sKpNCpMsEer_npPsbu5CXwoY3eXeuma6ibaq33MPrs?loadFrom=DocumentDeeplink&ts=675.39)):

Well, prior to showing up to the seller's house, I will just verify that they're the actual owners. So I'll do my due diligence in the tax records and the MLS just to make sure that the actual owner's able to sell the property. I will also check the forewarn app or whatever app you have available to you just again. And then if it's a neighborhood for some reason I'm not familiar with, I'll go and drive through the neighborhood because I feel that's also good practice just so that you understand the area that you're talking about. But that's typically what I'll do prior to a listing appointment. As I mentioned before, generally there's somebody else either on my team or personally that knows where I am. A lot of times we will do listing appointments and buy our appointments in groups. So I'll either have another agent with me who goes along as well. So there is safety and numbers. So especially if at any time you feel uncomfortable but still want to hold the appointment, I always encourage bringing a fellow, a real estate professional with you just so that you know that there's safety in numbers.

Speaker 1 ([12:26](https://www.rev.com/transcript-editor/shared/V0bP9MwZ1kiLBOP-0h_huJQ5XUyKAySNtOup_qajZYncWwZ3FFh11fGo-SGi2yKZQ-BluZKNWoHCP2RfugKdFq98MFo?loadFrom=DocumentDeeplink&ts=746.05)):

You literally took the words out of my mouth. I was going to say there's safety in numbers and there truly are. It truly is because when I look back, and I've been doing this a long time and I study crimes against agents, you rarely hear about a crime against two agents at a property. So definitely part of your safety plan should be assembling a team around you, whether it's someone who will accompany you during showings and like you said, someone on your team or a new agent. Speaking of which, let's talk a little bit about your safety plan for open houses. Now I know that's kind of a debatable topic in the real estate industry and I follow a lot of conversations on social media and some people are saying, open houses don't sell houses. It's just for lead generation. Other people are saying the more eyes that are on a house, the better. So Miguel, what are your thoughts about open houses and what is your safety plan when conducting one?

Speaker 3 ([13:19](https://www.rev.com/transcript-editor/shared/oXX90udEi4vowv2TLoCEd7HgywengH_yJiXtHgk-6f6r7KJ3Kx3J-9_-XWqK90RNglnEn3Y4on5oPFaDogHba_ME9Ac?loadFrom=DocumentDeeplink&ts=799.45)):

The first thing, again, it's the same. I coming early, I walk around the house and open all the doors, the back doors are unlock it, all the life has owned. And usually if the house don't have any kind of video camera security system, I bring my own laptop, put music, and between the music I had the camera on and a big room when we can see everything, sometimes depending on who is coming, I let everyone know that the house has a camera. And again, also I have to check for phone connection. That's always a basis for me. Definitely.

Speaker 1 ([14:01](https://www.rev.com/transcript-editor/shared/jJ_jbZbkuKaKXQKb8K_tOa-KU4H1RiaGMemwsrH2R86WjmsguvygaPQOB-s6tu7HWYY0E8xOSppF9ZlxhaoAEno7Cx4?loadFrom=DocumentDeeplink&ts=841.99)):

Right, and I agree that should be on the list and so often agents don't think about it. Susan, talk to me about your open house safety plan. What does that look like?

Speaker 2 ([14:10](https://www.rev.com/transcript-editor/shared/3so5tm203yFGQlejWrgxxADBYlc3BsejTLDAdxY5py0IdwlMOsv_9f6vZJzGzZ2dC6SaqdGSDWNLxw4L4Z7Im9h61es?loadFrom=DocumentDeeplink&ts=850.18)):

So for me in particular, I like to tour the home prior to doing the open house, just so I'm familiar with the property, whether it's vacant or occupied. I also, again, do a lot of open houses with another agent. There's always agents who are looking just to gain experience. So it's a great time to have someone shadow you as well as just have a partner there. I also, prior to the open house, invite the neighbors typically, so I'll let the neighbors know sometimes just out of courtesy, if it's a smaller tight neighborhood that oh, there's going to be a lot of traffic coming in and out of here. Let's say if it's a townhouse or a condo community, please forgive if somebody parks in your spot. That way the neighbors know that there are other things going on prior to just the signage being out.

([14:58](https://www.rev.com/transcript-editor/shared/9a4p0nXf1BfaKOjMDxrJSzC0jcU2y4QQyz-53PnzKDcQFy_97rwo3bMfftcGLVyrvdnArW-Wq-SKiTLLr7-VYns5yjs?loadFrom=DocumentDeeplink&ts=898.7)):

So you kind of feel like, oh, people know I'm here and I typically hold mine in the middle of the daytime hours so that it's not worrisome. We do occasionally do an evening open house and there's always somebody with you for those that you're never alone. And then for me, I don't typically bring my laptop, but I'll have my phone. So if there isn't a recording device in the house and I'm saying I feel uncomfortable with say the person that is in the house, I'll pick up my phone and be like, oh, so sorry, excuse me. I have to take this call whether someone's on the other side or not, just so that they realize I'm on the phone and that it'll be less likely to do something strange or questionable.

Speaker 1 ([15:44](https://www.rev.com/transcript-editor/shared/neuAJiwhMZuIggYiKqa_V8_VRirnVm8nheN0FJWcnGZ-BpyRBrQN5J0nNB4TR7LAxerWTo69RqZInwhjhN-o5_8GyYA?loadFrom=DocumentDeeplink&ts=944.06)):

Yep. See that's that, what do I call it? The fake phone call strategy, right? Yeah, true. And it's actually, it's brilliant whether you're hosting an open house or you're showing a property and you feel uncomfortable, it's called creating a witness. So you jump on that phone call and you can give directions. Hey, you're right around the corner, you're almost here. Or I'm here alone just waiting for you to get here, or whatever it takes to get the impression that you're not alone. So that's just another tool. Let's talk a little bit about the consultations as part of your safety plan, having a conversation with the sellers as well as the buyers right up front to let them know your expectations. I know both of you have had to deal with this whole buyer agent agreement that agents are now required to have to get the buyers to the table to sign.

([16:29](https://www.rev.com/transcript-editor/shared/TxV65U4YPMQvhs8HALtlBQxi9nGG5Gi8Jex-8YpOjuZ7RlvoWCtRjtSUjEET2kLiek2x7oGv2hYmefItZlsSeANBv8I?loadFrom=DocumentDeeplink&ts=989.69)):

I'm saying roll your safety conversation into that agreement. Buyers, I need you to come in. Let's talk about the process. I want to make sure that you're not a victim of wire fraud or any kind of scams. So let's have the conversation. And by the way, here's how we're going to work together. Here's the buyer agreement. We've just touched on the tip of the iceberg of creating a safety plan. And I get to, again, talk to a lot of agents across the country and I hear them, especially new agents saying, we don't know what to do. We just got with a new brokerage, we don't know what to do. I see the scenarios on social media. I'm uncomfortable with this person. What do I do? Or This makes me uncomfortable. What should I do? I say that the broker managers and owners need to have the conversation and they need to be the ones to lead the conversations because it's overwhelming for agents. So each of you, what's your advice for either brokers, managers, and owners who have agents either new or seasoned who are not sure safety practices and protocols? Susan, what do you say to the leadership?

Speaker 2 ([17:31](https://www.rev.com/transcript-editor/shared/O00k4PcC3hMyQ8c0yHvPkQZ-PWJgsno0DQoo86AT5XlUK3wB8NmtRMVyc9JNtnYLjoCoCcsfl4GdjoWYDOkb0aL7pFo?loadFrom=DocumentDeeplink&ts=1051.34)):

For us, for our leadership, they actually, both the offices on men take a lot of care with this. So both offices have mentor programs. So if you're a new agent, whether you're an individual or on a team, you have a mentor on your team or within the office so that you have the opportunity to ask an experienced agent, what's going on, what should my procedures and protocols be? Just because as a new agent, you have so many overwhelming questions. I also find it's important for them to know that they have resources within an AR to go to, and there's checklists for everything so that they can print those checklists out and then adapt them to what works for them, but they don't have to reinvent the wheel. So as real estate professionals, we have a lot of things that are already provided for us, and a lot of times your broker will have those as well, what they like their safety process to be when you're showing a house, when you're meeting with a client. So I think it's best to just always have direct communication with your broker because that's what they want. They're there to help you and make sure you're safe and succeed. So I guess my advice would be just not to be afraid to ask the question and make sure you have a mentor who's there to help you.

Speaker 1 ([18:46](https://www.rev.com/transcript-editor/shared/nMJoZJwNRdUpdcUfNmkCHNnb5DzX7TMW3f9KRcs7x8BYmXhffTBl8_sGkxNQoK27BN0o8H-few76Y9xVZXT2IPhJaUg?loadFrom=DocumentDeeplink&ts=1126.35)):

Okay. Miguel, I want to hear from you before I ask both of you about how your safety plan has helped you in some circumstance. Miguel, what is your advice to your fellow agents who feel overwhelmed when they're thinking, we're just trying to earn a commission and put food on the table. Now you're telling me I need a safety plan. That's just one more thing on the list. What do you say to them about being overwhelmed and how to handle that?

Speaker 3 ([19:07](https://www.rev.com/transcript-editor/shared/9mEkeE_8yt_cjkzR9ufrsyxuCq_Tu7Y30xVA1loYrFNpopuMManK7HIzI3qTKKbdpkniWRHOER1sgFYsTxQKVTAXWz4?loadFrom=DocumentDeeplink&ts=1147.95)):

Well, companies like Keller Williams and Allen T where we actually belongs, they already have in place safety plans. I mean, we always recommend and trying to get into our leadership to just give more education. I always said education, education and our local association, we pretty much 60 70% of those are, or small companies, no big companies, probably one or two agents. That's the people that really probably would like to have more information about that. That will depend on our local association,

Speaker 1 ([19:47](https://www.rev.com/transcript-editor/shared/3Bequ0IkDcI2_s8DUsaiVeGyJ5p-zJb4X5TXhft-SP6fncgHYDX8osJ-E7acOLUciriPighU4WM6lx6_tbJTib60es4?loadFrom=DocumentDeeplink&ts=1187.46)):

And that's why I believe in making safety part of your business building plan. So when you're having that conversation with the sellers and buyers, you're showing your value, keeping you safe during this process, it's important to me and let me show you how I can do it. So that's helping your bottom line. And I also agree that associations and boards are a great resource, and that's who I speak to mostly. And Susan, you great about up a great resource in ar, realtor slash safety, almost anything and everything you could think about safety is online from the toolkits to the articles, and I've written some of them to the podcast, we started back in July of 2023. So you may have to binge watch a lot of podcasts, but we cover so many episodes, so many topics on each of the episodes. So before we wrap, I want each of you to talk to me about how your safety plan might've saved you in a certain circumstance or why you were happy you had one. Susan, can you think of a time?

Speaker 2 ([20:44](https://www.rev.com/transcript-editor/shared/GnD1g7YpTablVJUyW1PfE511sbRvxrfhDd0_QPXRiR-XbHzb2DU0BUf8E5O1JDjzROTGH4xqE6XpxiYaEiUTpIIsK-I?loadFrom=DocumentDeeplink&ts=1244.1)):

Sure. Actually, it was this year, I went to see a property for an investor, and I was a little unfamiliar with the area, so I did get there early and as soon as I drove up to the area, I knew it wasn't an area I shouldn't be at by myself. And the home was in really bad shape. So essentially when I got there, I made sure I was on the phone before I got out of my car. That's how uncomfortable I felt. And then from there, I actually FaceTimed my investor and had them on the phone on FaceTime. So I was speaking on speakerphone, so anybody walking by or seeing me could see that I was talking to another person, that I wasn't by myself. And I stayed on the phone until I actually got back in the car so that I was again giving that impression, which I was never alone. And I was very glad that I thought fast and did that because typically with an investor, you may just go and eyeball the property on your own just because that's what they're trusting you to do. But since I knew immediately I felt uncomfortable, I put them on the phone with me so that we weren't alone.

Speaker 1 ([21:54](https://www.rev.com/transcript-editor/shared/adlN5wb1FVvkpsDTKC_yEQASOQwjI4Pxh_NQf1gBwNlBiN3FS3Ls4cb7M9uJhLG4C9nHJ2Pxv7mRJDHAhi-WUkjAiqI?loadFrom=DocumentDeeplink&ts=1314.7)):

Good for you. And you bought up the number one safety tool for your safety plan, your gut, your intuition, instinct, six sense flight or flight, spidey sense, whatever you want to call it. That should be number one on your safety plan is listen to your gut. Miguel, what about you? Has your safety plan saved you in any situation or you were glad to have it? Well,

Speaker 3 ([22:16](https://www.rev.com/transcript-editor/shared/7_wrAArrN8r_pdYCF1vVSwvthk_07Ahesvo11tyjhI1HRBEt3UVsXqaMC-0uWD18oy342KhEqjMpK1Rl2Zt1yooJjRg?loadFrom=DocumentDeeplink&ts=1336.39)):

In my earliest years real estate professional, I was so excited to start my own business that I always invite my clients to drive with me. That was bad. Where I start planning later on one, two years in the business and trying to understand better the process, that's what I realized the big mistake I was committing. So I fixed that. I don't drive any more with them. I invited to follow me. That's the best way and never happens bad to me. But I believe just reading more and learning more about safety protocols allow me not to engage in that way or drive with any clients at all. At least it's an emergency. But other than that, I recommend not to do that.

Speaker 1 ([23:10](https://www.rev.com/transcript-editor/shared/e392UeczYaahGTXvkHUxIVXzqVGgJLrJgAYg1fecgEAq8mAJKZe070RneCwj4qCrLRXLUngG4oUjB_ewTM38ebj6mdU?loadFrom=DocumentDeeplink&ts=1390.96)):

Oh, wow. Okay. So both of you have strong safety plans. And again, we've covered having a safety plan from the beginning, the pre-meeting with the client, previewing the properties, open houses, safe showings, and the benefits of having a safety plan. Here's what I want you each to do now, I want you to give your fellow agents marching orders. I want you to tell them one thing that they need to start doing today to get a safety plan in place. Let's start with you, Susan.

Speaker 2 ([23:38](https://www.rev.com/transcript-editor/shared/niCZ82FAHP_kJrdHLTrYsKCL0bBD4XNRUNs7Y8Zu9VHl0FPuKBTnm0SSyBT9RFFQX9iF10J5m3nkN4LO3lLLdmtLVWE?loadFrom=DocumentDeeplink&ts=1418.62)):

The number one thing they should do is go to the NAR site and just print out that tips and tricks. The guide is right there, and like I said, they can change it to fit what their lifestyle is like, but that's going to be the easiest way for them to start because it's going to highlight basically anything and everything you should think about,

Speaker 1 ([23:57](https://www.rev.com/transcript-editor/shared/xPpkm6i4L1dae6rUX-D2mRpwzFPIaNg20Ooa9LsAlg0ynFROwwVQyUtQnHAVwU5H5q8JdY6vN-uBj33e9V-RCtz6Qjw?loadFrom=DocumentDeeplink&ts=1437.53)):

Right? The resources are there. And don't forget the brokerage. Go to leadership. They should hopefully have your plan in place.

Speaker 2 ([24:04](https://www.rev.com/transcript-editor/shared/YJZ6XNqw0ZBUjxG87Ag47hjzMsJqDyDd4iQYLZ4dYNGBLlLkWlnj_gnkJs5xIJA9xVr7q2ZrLjzIqJ70VcflRZZTr5o?loadFrom=DocumentDeeplink&ts=1444.31)):

Your office should have a plan in place. And I firmly believe if you're unsure or just uncomfortable, you should always bring a buddy and a fellow agent, nevermind is going along. They would rather you feel safe and comfortable.

Speaker 1 ([24:17](https://www.rev.com/transcript-editor/shared/qR2BzbfUNxyZRetbJUtiXHO0txncBFvl4uFBaz04aaR6W_aQhJ92sRMsDfziiN9ftYJDpkEW484aaAT-HVkYTKBWsho?loadFrom=DocumentDeeplink&ts=1457.09)):

And that industry partner, I guarantee you, a mortgage broker will do backflips to co-host that open house with you. So you're right, there's never an excuse to be loan. Miguel, what are your orders, your actionable marching orders for your fellow real estate agents who may be hesitating to create a safety plan?

Speaker 3 ([24:32](https://www.rev.com/transcript-editor/shared/3Uy1b0QNPUUvPcpuAdfHhXnW2hItYnT2aaJgl4_jHdLcL5oZBxuX-B_KOlKuHFjF7mM_LcKWYxWnC5V2xbQLvVzdNrk?loadFrom=DocumentDeeplink&ts=1472.75)):

Definitely I'm going to ask them to sign in four if they didn't, because most people just see the four app is already there, but nobody sign in. It's not going to happen. So I will ask him, go check the app and see all the information that you can get also from the Nerf safety website. So that's the two things definitely probably I going to talk to my local association again to make sure we actually communicate through our website, our social media pages that we have to make our people go and check again for safety plan.

Speaker 1 ([25:18](https://www.rev.com/transcript-editor/shared/9bmp3mEiooRPB5bVNWZd7rvNeyzk5LK8x-e_abyRfjPAYIkdlGBEKxt-xOFWDEB-TzTqCdJnx9p3Um5mXxanNaINRe8?loadFrom=DocumentDeeplink&ts=1518.5)):

Right? And you brought up the technology and you said forewarn again, and you also mentioned showing time. Keep in mind that Century Lock your lockbox has a safety tool. So the safety tools are there. So part of your safety plan should be to research the tools and know what's there. And keep in mind, you all mentioned, both of you mentioned your local association n ar mandates that all associations and boards must have some kind of safety education. So every association will have somewhere for you to go to get your education, so the resources are there. So I want to thank both you, Miguel and Susan so much for sharing your insights and tips, and I encourage agents to develop a safety plan. Your fellow agents have told you how to do it in an actionable way, how to use it to build your business, and also keep in mind that it helps to keep you safe when you're showing.

([26:08](https://www.rev.com/transcript-editor/shared/tK1lBYuqEQJlhj4x2ppQn5Q0g1wHu9PGZs8qrTon3akpXt4cbXKkdoFgfP0Rga7RO1WwlTeFS1QjMXpeTxuS8aBAjw4?loadFrom=DocumentDeeplink&ts=1568.66)):

And it also helps keep your consumer safe and build your business now and in the future. Everybody stay safe. Thank you for joining us on Drive Within ar, the Safety series. New episodes drop every month at magazine realtor slash drive or wherever you get. Your podcast members are encouraged to use only those safety tools in which they're properly trained. Additionally, the views, opinions, and concepts described on this podcast are for informational purposes only and should not be construed as legal advice on any subject matter. We encourage listeners to consult with their own legal counsel, find more safety resources at n.realtor/safety.