

## **Safe Steps for Meeting a New Client**

Here are 10 steps you can follow to help take the risk out of meeting prospects and clients:

1. Make sure you are not alone in the office when meeting someone. If you are alone, call a friend or colleague before the client is due to arrive and ask them to call and check on you 15 minutes into the visit. Then call them back when the person has left your office.
2. Ask each new client to stop by your office and complete a Prospect Identification Form, preferably in the presence of an associate.
3. When the person arrives, get the make, model and license number of their car. Check this information yourself—don't just take their word for it. You can do this discreetly by watching them drive up, glancing out at their car, or checking it when you leave the office.
4. Use a registration book for all clients and other visitors. Be careful to make sure that everyone signs in.
5. Photocopy the client's driver's license and retain this information at your office. Legitimate clients should not mind you copying their driver's license. People freely show their licenses to the clerk at the grocery store when they write checks, and we show their IDs to rent a movie. Be sure to dispose of this sensitive information properly when you are finished with it.
6. Get personal references as well as employment and home information. Then check all references and verify employment and current address. Check county property records to confirm ownership.
7. Introduce the prospect to someone in your office. A would-be assailant does not like to be noticed or receive exposure, knowing a person could pick him/her out of a police lineup.
8. Always let someone know where you are going; leave the name and phone number of the client you are meeting.

9. When talking to any client or prospect, be careful not to share any personal information—specifically, details on where you live or information that can allow the person to pinpoint your home.
  
10. When showing a property, always leave the front door wide open while you and the client are inside. As you enter each room, stand near the door.

(Sources: Louisiana REALTORS® Association, Washington Real Estate Safety Council, City of Albuquerque, NM, Nevada County Board of REALTORS®, Pinehurst NC Police Department)

This article is part of the NATIONAL ASSOCIATION OF REALTORS'® 2007 REALTOR® Safety Week Kit.