

REALTOR ETIQUETTE

Etiquette: A special code of behavior or courtesy.

Synonym: Decorum.

Realtor Etiquette as it applies to six aspects: Telephone, Keys and Lockboxes, Showings, Offers, Contracts and the Community.

I. Telephone

A. Answering

1. Identify yourself
2. Be prepared with pencil and paper; write down the information given
3. Most appointments need to be made NOW
4. If making an appointment, tell Agent how to access the house:
appointment, lockbox, key, etc.
5. If key is needed for appointment, make sure it is in the office and reserved for the Agent or in the lockbox at the showing location

B. Making the Call

1. For an appointment
 - a. Always give you name, company and reason for calling (to make an appointment)
 - b. Do not ask for the Listing Agent unless he/she must accompany showing
 - c. Some offices will transfer you to another party who will make the appointment
 - d. Provide the person making the appointment with:
 - (a) your name and company name
 - (b) day and time range (no more than one hour) of appointment desired
 - (c) tell who you are representing
 - e. If not volunteered, ask how you will access the home:
 - (a) appointment
 - (b) lockbox
 - (c) key (if access by key, ask if key has been reserved)
 - f. Thank the party for making the appointment
 - g. If no one answers at the Office to make the appointment:
 - (a) try any other numbers you have for the Listing Agent
 - (b) try any other numbers you have for a few of the other Agents in that Office (in large offices you are not expected to call every Agent)
 - (c) as a last resort, telephone the Seller direct for the appointment, explaining you could not reach his/her Agent

(d) call back and leave a message for the Listing Agent explaining what you have done

2. To Request information

- a. Always give name, company and reason for calling
- b. If the person from whom you need the information is not available, leave a voicemail message or fax them a message (to simply leave a name and number often sets in motion a game of phone tag)

II. Keys and Lockboxes

- A. Lockboxes are great and are appreciated by other REALORS®
- B. If access is by key, always have multiple keys so Agents are not inconvenienced
- C. Keys should be returned as soon as possible, certainly the same day as the showing unless the showing is after business hours
- D. If you lose a key, contact the Listing Agent IMMEDIATELY and offer to have the house re-keyed at your expense

III. Showings

- A. Be on time or call
- B. If another Agent is showing the house when you arrive, wait outside until he/she has finished
- C. Always ring the bell or knock
- D. If someone answers the door:
 1. Give them your calling card
 2. Introduce your Prospect
 3. Ask if they were expecting you (if not, handle the situation as diplomatically as possible, reschedule is necessary)
- E. If no one answers the door:
 1. Be on guard for pets who may be waiting at the door to make their exit or entrance
 2. Announce your entry loudly so that your presence will not startle anyone who may not have heard the bell or the knock
 3. If the Seller has turned on the lights for you, make sure you turn them off before you leave
 4. Make sure the house is locked when you leave
- F. You are responsible for keeping your Prospects together and making sure they and their children leave the house as you found it (should there be a problem, report it at once to the Seller or to the Listing Agent)
- G. If you need any information about the property, work through the Listing Agent
- H. Be willing to respond to requests from the Listing Agent for feedback on the showing

IV. Offers

- A. If you are writing the Offer:
 1. You should deliver it to the Listing Agent (if after a reasonable period of time you cannot locate the Listing Agent, contact his/her Broker who will arrange for the Offer to be presented)
 2. Always treat the Listing Agent with utmost courtesy

3. Never tell the Listing Agent how to do his/her job
 4. Resist the urge to tell the Listing Agent how overpriced his/her listing is
 5. Give the Listing Agent enough information to do his/her job, being careful not to violate your Agency Agreement
 6. You have the right to appear before the Seller, present your Offer and leave while the Listing Agent discusses the Offer with the Seller, but consider:
 - a. the Listing Agent knows the Seller and how best to approach him/her, you probably do not
 - b. you may make the Seller angry and the Listing Agent may have a hard time getting a Counter Offer, much less acceptance of your Offer
 - c. your request to present your Offer may translate to the Listing Agent that you do not think he/she is capable of presenting the Offer
 7. Let the Listing Agent know how he/she can reach you
- B. If you receive an Offer on one of your Listings:
1. Always treat the Selling Agent with utmost courtesy
 2. Never belittle the Offer, ask enough questions to understand the reasoning behind it
 3. Tell the Agent if you have another Offer on the property (let the other Agent know also)
 4. Attempt to contact the Seller, set a time to present the Offer and let the Selling Agent know when you will be making the presentation
 5. Keep the Selling Agent informed
- V. Contract to Closing
- A. Keep the other Agent informed
 - B. Be cognizant of the dates in the Contract and prepare to meet any deadlines
 - C. If there is a problem, resolve it NOW not at the Closing Table
 - D. Do not make another Agent look bad (remember, everyone forgets sometimes and everyone makes mistakes)
- VI. In the Community
- A. Never make your business idle gossip
 - B. Never say anything that will reflect poorly on another REALTOR® or our Profession
 - C. Conduct yourself in a manner that will be admired by those in your REALTOR® community

Additionally, the obligations of a member of the REALTOR® association impose a higher standard with regard to the statements made about competitors. Article 15 of the REALTOR® Code of Ethics states,

REALTORS® shall not knowingly or recklessly make false or misleading statements about competitors, their businesses, or their business practices.

The National Association's Professional Standards Committee has said the Article logically flows from the REALTOR®'s duty established in Article 12 "to present a true picture in ... representations." This includes comparisons with competitors, and comments or opinions offered about other real estates professionals. While the Article is not intended to limit or inhibit the free flow of the commercial and comparative information that is often of value to potential users of the many and varied services that REALTORS® provide, it does require a good faith effort to ensure that statements and representation are truthful and accurate.

The path to managing this risk is really consistent with the philosophy of the REALTOR® organization. By focusing on the positive and presenting it honestly, the potential risks posed by the antitrust laws will be minimized and you will not only have avoided that legal and ethical liability, but you will probably elevate yourself and your firm in the eyes of the most important audience, the people who are going to be selecting you to represent them in the sale or purchase of their home.

Excerpts from Antitrust and Real Estate for REALTORS® and REALTOR-ASSOCIATE®s (5th ed.) and Professionalism in Real Estate (2003).

Additional Resources:

Avoiding Antitrust Risk (a *REALTOR Magazine* Toolkit)

<http://www.realtor.org/rmtoolkits.nsf/pages/brokerrisk17?OpenDocument>

Antitrust and the Real Estate Brokerage Firm (*The Letter of The Law*)

<http://www.realtor.org/LetterLw.nsf/pages/0802antitrust?OpenDocument>

Please note: Both of the foregoing articles are in the members-only section of Realtor.org

REALTOR® Code of Ethics

<http://www.realtor.org/mempolweb.nsf/pages/code?opendocument>

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