Plan the sign-in and route

Use this worksheet for one event. Adapt follow-up to the visitor's requested channel and scope. Attendance alone should not enroll a person in unrelated ongoing marketing.

Event ID / property / date

Hosting agent / brokerage

Sign-in specification

Visitor: Name, preferred channel, and email OR phone for that channel.

Optional: Buyer / seller / neighbor / browsing / unsure; working with an agent; question or requested next step.

Form configuration: Event ID, property, date and hosting agent. Record follow-up preferences and permission.

Routing worksheet

Visitor intent	First useful follow-up
Buyer	Ask whether they want details, a tour or similar homes.
Seller	Ask whether they want to discuss selling their own home.
Neighbor	Ask what local information would help; send updates if requested.
Browser / unsure	Ask whether they want occasional updates or no follow-up.

Assigned agent / backup / reply target

Answer the specific request

Use the channel the visitor requested. Replace every bracketed field and check the property link before sending. These are templates for review, not messages sent by this kit.

Open house follow-up email template

Subject: Details from your visit to [property address]

Hi [first name],

Thanks for visiting [property address] today. I'm [agent name], the agent who hosted the open house.

Here's the property information you requested: [property link]. You can find [relevant detail the visitor asked about] there, too.

What did you think of the home? If it wasn't quite right, tell me what you'd change and I can send options that better fit what you're looking for.

If you'd like another look, reply with a time that works for you and I'll check showing availability.

[Agent name]
[Brokerage and contact details]

Send this to a visitor who requested property details by email.

A follow-up text for a specific request

Hi [first name], it's [agent name] from the [property address] open house. You asked about [specific question]. [Checked answer or relevant link]. Would you like me to help with anything else about the home?

If the answer still needs checking, create a task for the agent instead of sending an automated guess.

Use the reply to choose the next step

Pause the generic sequence when someone answers. Record their request in the CRM and assign the hosting agent a task. Do not send buyer listings to someone who asked about selling their own home. If they decline further contact, stop the sequence and retain that preference.

First messages and stop rules

Identify the hosting agent, stay within the requested scope, and let the reply take priority over the original tag.

Sample first messages

Buyer
Hi [Name], this is [Agent]. Thanks for visiting [Property]. Would you like details about this home or similar options?

Seller
Hi [Name], this is [Agent] from the [Property] open house. You mentioned selling. Would a conversation about your plans be useful?

Neighbor
Hi [Name], this is [Agent]. What information about the local market would be useful after your visit to [Property]?

Browser
Hi [Name], this is [Agent] from [Property]. Would you like occasional updates, or would you prefer no further follow-up?

Duplicates and stop rules

- [ ] Use event ID plus contact ID to prevent duplicate enrollment.
- [ ] Add return visits to history; review conflicting phone/email matches.
- [ ] Pause generic reminders on a reply, booking, representation review or manual handoff.
- [ ] Stop on opt-out or invalid contact details.
- [ ] Recheck status immediately before every scheduled message.

Agent task when a reply arrives / backup if unavailable

Test before launch

Use a team-controlled test contact outside customer reporting. Record the checks and who approved the form and workflow before launch.

Pre-launch test checklist

- [ ] Use a team-controlled test contact outside customer reporting.
- [ ] Same event submitted twice creates one sequence.
- [ ] Existing contact keeps its history and assigned agent.
- [ ] Reply reaches owner and cancels generic reminders.
- [ ] Booking, opt-out and invalid details stop later messages.
- [ ] Email preference does not trigger an SMS.

Test contact / event ID

Test date / tester

Issue found / correction / retest result

Form/workflow approver and date

Keep the completed worksheet with the event setup. This blank kit records no real visitor data and reports no client results.