OPEN HOUSE

AGENT TARGETING PLAN

A 3-Phase Relationship-Building Playbook

How to turn weekend open houses into lasting real estate agent partnerships: show up prepared, make the hosting agent look great, and follow up in a way they remember.

01
BEFORE
Target + Connect

02
DURING
Stand Out + Show Up

03
AFTER
Follow Up + Build Trust

THE OBJECTIVE

Build trust by showing up with intention, providing immediate value, and following up in a personal, meaningful way — so agents see you as the lender who helps them sell homes and convert buyers, not just another business card.

WHY OPEN HOUSES, WHY NOW

Agents remain buyers' most-trusted resource, and today's buyers face real financing hurdles. A prepared lender at the open house helps the agent answer the “can I afford this?” question on the spot.

88%
of buyers purchased through an agent — agents are your gateway to buyers.

21%
first-time buyer share, a record low. Payment and down-payment education matters.

40
median age of first-time buyers, a record high. Many have waited years and need a plan.

10%
median down payment for first-time buyers. Know your low-down-payment and DPA options.

Source: National Association of REALTORS®, 2025 Profile of Home Buyers and Sellers.

CHOOSE YOUR APPROACH

QUICK POP-IN | SIMPLE

Drop by for 10–15 minutes with a small gift or open house emergency kit. Low prep, high goodwill. Start here.

PERSONALIZED GIFT | ADD-ON

Pull a Partner Intel report on the agent sitting the open and bring a gift picked just for them.

FULL PLAYBOOK | PHASES 1–3

Planned outreach, co-branded tools, and a 90-day follow-up for agents you want as long-term partners.

OPTION A: THE QUICK POP-IN

When you want a simple, repeatable weekend routine: no setup, no table, no pitch. Just a friendly face and something that makes the hosting agent's afternoon easier.

STEP	WHEN	WHAT TO DO
1. Pull	Thursday	Pull the MLS open house list (most weekend opens are entered by Thursday). Pick 3–5 close together so you can hit them in one loop.
2. Pack	Friday	Build one emergency kit per stop. Add your card and a tag with your name, NMLS#, and phone.
3. Pop in	Sat–Sun	Stay 10–15 minutes. Go early in the open or during a lull. If it's busy, hand off the kit, smile, and go.
4. Follow up	Same day	Send a quick thank-you text, connect on social, and log the visit in Total Expert.

HOW TO PULL OPEN HOUSES FROM THE MLS

- **Search Open Houses** for the upcoming Saturday–Sunday, filtered to your target zip codes and price ranges.
- **Save the search** with Thursday alerts so the list comes to you every week.
- **Confirm who is sitting the open.** It isn't always the listing agent; check the open house host or remarks field, or ask the listing agent.

WHAT GOES IN THE OPEN HOUSE EMERGENCY KIT ($10–$20)

☐ **Water + snacks** granola bars, mints, gum	☐ **Phone charger** or a small power bank
☐ **Shoe covers** for rainy or snowy days	☐ **Cleaning wipes** + paper towels for spills
☐ **Hand sanitizer** + tissues	☐ **Pens + sticky notes** for sign-ins and notes
☐ **Bandages** and a few safety pins	☐ **Lint roller + tape** for last-minute fixes

POP-IN SCRIPT

"Hi! I'm [Name] with Fairway Home Mortgage. I'm local and dropping off open house emergency kits to agents hosting this weekend. No pitch, just wanted to say hi and make your afternoon a little easier. How's turnout been?"

SAME-DAY TEXT

“Great meeting you today at [Street]! Hope the kit came in handy. If you ever want payment flyers or a QR sign-in for a future open house, I’m happy to help.”

ADD-ON: PERSONALIZED PARTNER GIFT

For your A-tier agents, go one step further. Pull a Partner Intel report on the agent sitting the open and bring a small gift picked for them instead of (or alongside) the emergency kit. A gift that shows you paid attention is remembered long after the open house.

1. PULL THE PARTNER INTEL REPORT

- **Confirm the host:** pull the report on the agent actually sitting the open, not just the listing agent.
- **Business snapshot:** production, price points, active listings, recent closings, brokerage, and years licensed.
- **Lender relationships:** who they've closed with recently, so you know if there's an opening.
- **Personal preferences:** add what they share publicly on social: hobbies, teams, pets, favorite coffee spot, milestones.

2. MATCH THE GIFT TO THE AGENT

IF THEY LOVE…	BRING…	EST. COST
Coffee	Their go-to drink from their favorite local shop, or a small gift card there	$5–$15
Sports	A koozie, cap, or snack pack in their team's colors	$10–$20
Their pet	Dog or cat treats with a "for the office manager" tag	$8–$15
Fitness / wellness	Electrolyte drinks, protein bars, or a reusable water bottle	$10–$20
Sweets / foodie	A treat from a local bakery or their favorite spot	$8–$15
Plants / home	A small succulent or desk plant	$8–$15
New to the business	A "first open houses" kit: notebook, nice pen, and the emergency kit	$15–$20

3. MAKE IT PERSONAL (NOT CREEPY)

- Only reference what the agent shares publicly; keep business data from the report to yourself.
- Add a short handwritten note that connects the gift to them, and keep it about them, not your loan products.
- Log what you gave and what you learned in Total Expert so your next touch builds on it.

SAMPLE GIFT NOTE

"[Name], saw you're a big [team / coffee / dog] fan, so here's a little something to get you through the open house. Good luck today! — [Your Name], Fairway Home Mortgage"

KEEP GIFTS COMPLIANT

A gift to an agent is a "thing of value" under RESPA. Keep gifts modest and occasional, stay within Fairway's gift policy and dollar limits, never tie a gift to past or future referrals, and log every gift. Check with compliance before you start this routine.

01 BEFORE THE OPEN HOUSE

STRATEGIC OUTREACH + VALUE OFFER

1. IDENTIFY TARGET AGENTS

- **Pull the MLS open house list every Thursday:** most weekend open houses are entered by then. Fill in gaps with Zillow, Realtor.com, and social media.
- Prioritize agents producing approximately $2M–$15M, local to your market, or active in neighborhoods you want to grow.
- Look for new listings, recent price changes, or listings sitting 30+ days — that is where extra support is most valuable.
- Favor homes in first-time-buyer price ranges; those visitors are most likely to need a financing conversation.

PRIORITIZE WITH A SIMPLE TIER SYSTEM

TIER	WHO THEY ARE	YOUR APPROACH
A – Grow	Mid-producers ($2M–$15M), active listers, no clear preferred lender	Personal outreach every open house; ask for coffee within 2 weeks
B – Nurture	Newer agents, agents new to your area, or occasional listers	Offer open house support and education resources; stay top-of-mind monthly
C – Watch	Top producers with an established lender or team	Light touch: social engagement, market updates, be ready when an opening appears

2. DO YOUR HOMEWORK (15 MINUTES PER LISTING)

- **Know the home:** list price, taxes, HOA, days on market, and any price changes.
- **Run payment scenarios:** estimated monthly payment at a few down-payment levels (e.g., 3.5%, 5%, 10%, 20%) using current pricing, prepared for compliance approval.
- **Check program fit:** first-time buyer, FHA/VA/USDA, and down payment assistance programs the home may qualify for.
- **Pull a Partner Intel report:** on the agent sitting the open: production, price points, lender relationships, and interests you can genuinely connect on.

3. SEND A WARM INTRODUCTION

Reach out by text, direct message, or email on Thursday or Friday, as soon as the open house posts. Keep the message helpful, local, and low-pressure.

SAMPLE MESSAGE | TEXT OR EMAIL

"Hi [Name], I saw you're hosting an open house this weekend on [Street Name]. I'd love to stop by with something helpful for your visitors, no strings attached. I'm a local lender with Fairway and I put together payment scenarios for the home so buyers can see what it could cost each month. Would you mind if I popped by with something small for your table?"

No reply? Send one friendly nudge the day before. If you still don't hear back, don't show up uninvited — add the agent to next week's list and engage with their listing posts instead.

02 DURING THE OPEN HOUSE

IN-PERSON CONNECTION + VALUE DELIVERY

ARRIVAL ETIQUETTE

- Arrive at the time you agreed on, ask where the agent would like you set up, and keep your footprint small.
- Let the agent greet visitors first. You support; the agent owns the buyer relationship. Silence your phone and stay the full time you committed to.

CHOOSE 1–2 USEFUL ITEMS PER VISIT

ITEM	VALUE	BUDGET TIP
Property Payment Flyer	Monthly payment scenarios for this home at different down payments	Free; template in Total Expert
QR Code Sign-In	Co-branded Total Expert landing page that captures visitors for both of you	Free with Canva + TE
Buyer Questions Handout	Co-branded “questions to ask before you buy” resource	$0.10 per copy
First-Time Buyer / DPA Guide	Overview of low-down-payment and assistance options	$0.10–$0.25 per copy
Local Market Snapshot	Homebot flyer with timely market context	Free to create
Open House Survival Kit	Water, cookies, or mints for visitors with your sticker	$5–$10 per house
Visitor Charging Station	Convenient phone charging for guests touring the home	Small one-time cost
Visitor Raffle	Coffee card or small prize for guests who sign in	$5–$10 (check rules first)

KEEP THE FOCUS

Be useful without being salesy. Your goal is to help the agent look good in front of buyers — everything you bring should serve visitors and make the agent’s open house better.

CONVERSATION STARTERS WITH THE AGENT

- Compliment the listing or staging with a specific, genuine observation.
- “How has turnout been today? What questions are buyers asking most?”
- “What’s the biggest thing slowing your buyers down right now?”
- Explore collaboration: “Are you working with a lender who helps you co-market like this regularly?”
- Connect around a shared goal: helping buyers feel confident and ready to write strong offers.

HELPING VISITORS (WHEN THE AGENT INVITES YOU IN)

- “Have you had a chance to see what the monthly payment on a home like this could look like?”
- “Are you working with an agent yet?” — if not, point them back to the hosting agent first.
- Offer a quick next step: a no-pressure call to talk through numbers or a pre-approval link.

BEFORE YOU LEAVE

- Thank the agent, offer to help at their next open house, and confirm how they want visitor follow-up handled.

- Snap a photo of the setup (with permission) for a social shoutout.

03 AFTER THE OPEN HOUSE

THOUGHTFUL FOLLOW-UP + LONG-TERM NURTURE

SAME DAY: SEND A QUICK RECAP

Within a few hours, text the agent a short thank-you plus anything useful you learned: number of QR sign-ins, visitors who asked about financing, and common questions. This is often what separates you from other lenders.

FOLLOW UP WITHIN 24–48 HOURS

SAMPLE FOLLOW-UP

"Hi [Name], it was great seeing you at the open house. I appreciated how you connected with the visitors. I'd love to grab coffee next week and brainstorm a few ways we could support each other's business."

ADD A MEMORABLE SECOND TOUCH

HANDWRITTEN NOTE

A personal, memorable touch mailed within the week.

SOCIAL SHOUTOUT

Tag the listing and recognize the agent's work and turnout.

VALUE-ADD EMAIL

Share a co-branded flyer, pre-approval link, or practical resource.

90-DAY NURTURE CADENCE

WHEN	TOUCH	PURPOSE
Day 0	Thank-you text + visitor recap	Show immediate value and attention to detail
Day 1–2	Follow-up call or text; request coffee	Move from event to relationship
Day 3–7	Handwritten note + social shoutout	Be memorable and give public recognition
Day 14	Coffee meeting or quick call	Learn their business, goals, and buyer pain points
Day 30	Offer to support their next listing or open house	Become part of their routine
Day 60	Market update or Homebot snapshot for their farm area	Stay helpful and top-of-mind
Day 90	Partnership check-in: what's working, what's next	Decide on an ongoing co-marketing rhythm

COFFEE MEETING: QUESTIONS TO ASK

- What does a great lender partnership look like to you? What has frustrated you in the past?
- How do you prefer to communicate during a transaction (text, call, email) and how often?
- Where do most of your buyers come from, and where do deals tend to fall apart?
- What are your goals for the next 12 months, and how can I help you reach them?

SYSTEMIZE THE PROCESS

WEEKLY RHYTHM

DAY	FOCUS	KEY ACTIONS
Monday	Follow up	Recap texts and calls from the weekend; log everything in Total Expert
Tue–Wed	Relationships	Coffee meetings and 90-day nurture touches with current partners
Thursday	Pull + research	Pull the MLS open house list; pick 3–5; tier the agents; pull Partner Intel on A-tier hosts
Friday	Outreach + prep	Send warm intros; build emergency kits and personalized gifts; print flyers
Sat–Sun	Show up	Attend 2–3 open houses; same-day recap to each agent

WEEKLY ACTIVITY CHECKLIST

✓	WEEKLY ACTION	EXECUTION NOTE
☐	**Pull MLS open houses (Thursday)**	Pick 3–5; pull Partner Intel on A-tier hosts.
☐	**Reach out to 3 agents**	Use a warm text, DM, or email.
☐	**Attend 2–3 open houses**	Bring one or two useful items.
☐	**Send same-day recaps**	Thank-you plus visitor insights.
☐	**Follow up with every agent**	Use a call, text, note, or email within 48 hours.
☐	**Book 1 coffee meeting**	Convert at least one open house into a sit-down.

SCOREBOARD: WHAT SUCCESS LOOKS LIKE

METRIC	WEEKLY GOAL	90-DAY TARGET
Agents contacted	3–5	40–60
Open houses attended	2–3	25–35
Coffee / 1:1 meetings	1	10–12
Agents who invite you back	—	5+
Referrals / pre-approvals from partners	—	Track monthly

TRACK EVERY INTERACTION

Print this page or mirror it in Total Expert so no follow-up slips. Log every agent touch, what you brought, and the agreed next step.

AGENT / BROKERAGE	CONTACT INFO	OPEN HOUSE DATE	WHAT YOU BROUGHT	FOLLOW-UP DATE	NEXT STEP / NOTES

OPEN HOUSE AGENT TARGETING PLAN

AGENT / BROKERAGE	CONTACT INFO	OPEN HOUSE DATE	WHAT YOU BROUGHT	FOLLOW-UP DATE	NEXT STEP / NOTES

STAY COMPLIANT

Open house support is a great way to build relationships, as long as the value goes to consumers and every co-marketing piece is approved and paid for fairly. Review these guardrails with your manager and Fairway compliance.

RESPA + MARKETING GUARDRAILS

- **Never pay for referrals.** Don't give agents anything of value (gifts, meals, tickets, free services) tied to or appearing tied to referrals.
- **Keep agent gifts modest.** Emergency kits and personalized gifts should be small, occasional, within Fairway's gift policy, and never tied to referrals. Log them.
- **Split co-marketing fairly.** On co-branded materials and ads, each party pays its proportional share; keep records.
- **Get approval first.** Submit flyers, landing pages, social posts, and payment scenarios to compliance before use.
- **Watch trigger terms.** Payment or rate examples can require additional disclosures under advertising rules.
- **Include required info.** Your name, NMLS#, company NMLS# 2289, and the Equal Housing Opportunity statement.
- **Check raffle rules.** Drawings and prize giveaways vary by state and company policy.

This summary is a general reminder, not legal advice. When in doubt, ask compliance before you act.

BONUS IDEAS TO STAND OUT

OPEN HOUSE PHOTO MOMENT

Bring a simple "New Home Vibes" frame, take guest photos, and tag the agent.

WEEKEND LOCAL GUIDE

A one-page list of nearby events, coffee shops, and attractions with your contact info.

AGENT OPEN HOUSE PLAYBOOK

A one-page guide with practical ideas to improve open house turnout and conversion.

RENT VS. OWN SNAPSHOT

Compare local rent to the payment on this home — a powerful visitor conversation starter.

BUYER WORKSHOP INVITE

Invite unrepresented visitors to a co-hosted first-time buyer class with the agent.

CO-BRANDED PROMO GRAPHIC

Offer an "Open House This Sunday" social graphic, approved and cost-split.

ULTIMATE GOAL

Show up with intention. Provide value agents can use immediately. Follow up in a way that feels personal and meaningful.