

Utah FSBO

Professional Open House Checklist

**A Fair-Value System That Gives FSBO Sellers Professional Open-House Support
Without Requiring a Listing Agreement**



You Keep Control. Buyers Receive a Better Experience. Everyone Has a Reason to Participate.

Prepared by: Tres Miller

UtahHomeownershipAuthority.com

The Magic Mortgage Lender

435-229-9797

Residential Mortgage Loan Officer

FSBO EDUCATIONAL WORKBOOK

NMLS #217768

OPEN HOUSE PLANNING SHEET

UTAH FSBO PROFESSIONAL OPEN HOUSE CHECKLIST

Plan • Prepare • Promote • Host • Follow Up

PROPERTY INFORMATION

Property Address: _____

City / ZIP: _____

Asking Price: \$ _____

Estimated Square Footage: _____

Bedrooms: _____ Bathrooms: _____

HOMEOWNER INFORMATION

Homeowner Name: _____

Mobile: _____ Email: _____

EVENT DETAILS

Open House Date: _____ Start Time: _____ End Time: _____

Planning Meeting Date: _____ Setup Time: _____

Weather Backup Plan: _____

PROFESSIONAL TEAM

Participating Realtor: _____

Realtor Mobile: _____ Email: _____

Mortgage Professional: _____

Mortgage Prof. Mobile: _____ Email: _____

PRIMARY GOALS

- ☐ Sell the property at or near asking price
- ☐ Generate qualified buyer interest
- ☐ Gather buyer feedback on price and presentation
- ☐ Schedule second showings
- ☐ Connect unrepresented buyers with professional assistance
- ☐ Provide financing information when requested
- ☐ Other: _____

OPTIONAL MARKETING BUDGET

Approved Budget: \$ _____ ☐ No paid marketing at this time

Professional time and existing marketing systems may be provided as part of the exchange. Any paid advertising, printing, postage, photography, specialty signs, refreshments, or outside-vendor expenses require the homeowner's prior approval.

TOP THREE SELLING FEATURES

1. _____
2. _____
3. _____

PLANNING NOTES

ROLES AND SHARED EXPECTATIONS

Utah FSBO Professional Open House Checklist

Plan • Prepare • Promote • Host • Follow Up

SHARED EXPECTATIONS

This checklist confirms the shared expectations for the Professional Open House. Each participant initials below to confirm understanding.

EXISTING REPRESENTATION

- ☐ Existing buyer-agent relationships are respected at all times.
- ☐ Represented buyers will be directed back to their own agent.
- ☐ No attempt will be made to interfere with existing professional relationships.

HOMEOWNER CONTROL

- ☐ The homeowner remains in control of all decisions regarding the sale.
- ☐ No listing agreement is required or implied by this arrangement.
- ☐ The homeowner may end the arrangement at any time.

MARKETING EXPENSES

- ☐ Outside marketing expenses (EDDM, paid social, printing, photography, signs, vendors, refreshments) require written homeowner approval before commitment.
- ☐ Professional time, expertise, and available systems may be contributed as part of the exchange.

BUYER PARTICIPATION

- ☐ Follow-up with visitors is permission-based only.
- ☐ Visitors who do not consent to follow-up will not be contacted.
- ☐ Unrepresented buyers may be offered professional assistance if they request it.
- ☐ Follow-up with visitors is permission-based only.

HOMEOWNER RESPONSIBILITIES

- ☐ Prepare the property for showing (see Property Preparation checklist).
- ☐ Be available to answer property-specific questions.
- ☐ Approve any marketing expenses in advance.
- ☐ Provide accurate property information and required disclosures.

REALTOR RESPONSIBILITIES

- ☐ Assist with marketing, presentation advice, and buyer traffic.
- ☐ Manage visitor registration and buyer questions about the market.
- ☐ Stay within real estate expertise; refer other questions appropriately.
- ☐ Respect the homeowner's decision-making authority.

MORTGAGE PROFESSIONAL RESPONSIBILITIES

- ☐ Provide financing information to interested visitors.
- ☐ Help buyers understand affordability and loan options.
- ☐ Stay within mortgage expertise; refer legal, tax, title, and inspection questions.

REFER TO THE APPROPRIATE PROFESSIONAL

- ☐ Legal, tax, inspection, appraisal, and title questions are directed to the appropriate licensed professional.
- ☐ Each team member stays within their area of expertise.

SHARED UNDERSTANDING

Homeowner Initials: _____ Date: _____

Realtor Initials: _____ Date: _____

Mortgage Professional Initials: _____ Date: _____

PROPERTY PREPARATION CHECKLIST

Utah FSBO Professional Open House Checklist

Plan • Prepare • Promote • Host • Follow Up

EXTERIOR

- ☐ Mow and edge the lawn
- ☐ Trim shrubs and landscaping
- ☐ Sweep the porch and walkways
- ☐ Clean the front door
- ☐ Clean exterior windows
- ☐ Remove driveway clutter
- ☐ Check exterior lighting
- ☐ Remove pet waste
- ☐ Confirm steps and walkways are safe

INTERIOR

- ☐ Deep clean the home
- ☐ Clean the kitchen and bathrooms
- ☐ Vacuum and mop floors
- ☐ Declutter counters and surfaces
- ☐ Remove excessive personal items
- ☐ Open blinds and curtains
- ☐ Replace burned-out bulbs
- ☐ Set a comfortable temperature
- ☐ Reduce strong odors
- ☐ Make beds and organize visible storage

SAFETY AND SECURITY

- ☐ Secure medications
- ☐ Secure firearms
- ☐ Remove financial documents
- ☐ Secure jewelry, keys, and valuables
- ☐ Remove or secure pets
- ☐ Remove trip hazards
- ☐ Lock restricted rooms
- ☐ Confirm smoke and carbon monoxide detectors are operational

PROPERTY DOCUMENTS

- ☐ Seller disclosures
- ☐ Improvement list
- ☐ Utility information
- ☐ HOA information
- ☐ Property-tax information
- ☐ Fixture and exclusion list
- ☐ Offer-submission instructions
- ☐ Estimated mortgage payoff information, if available
- ☐ Preferred closing timeline

ITEMS TO COMPLETE BEFORE THE OPEN HOUSE

1. _____
2. _____
3. _____

MARKETING AND PROMOTION CHECKLIST

Utah FSBO Professional Open House Checklist

Plan • Prepare • Promote • Host • Follow Up

PROFESSIONAL AND LOW-COST PROMOTION

- ☐ Social-media posts
- ☐ Realtor database
- ☐ Mortgage professional database
- ☐ Email announcements
- ☐ Text announcements
- ☐ Personal contacts
- ☐ Neighborhood notification
- ☐ Door knocking
- ☐ Community groups
- ☐ Online event listings
- ☐ Realtor-to-Realtor outreach
- ☐ Prior buyers interested in the area

PROPERTY MARKETING MATERIALS

- ☐ Yard sign
- ☐ Directional signs
- ☐ Property flyer
- ☐ Property information sheet
- ☐ QR code
- ☐ Social-media image
- ☐ Correct address, date, and time
- ☐ Asking price confirmed
- ☐ Three strongest property features identified
- ☐ All links and QR codes tested
- ☐ Seller disclosures ready
- ☐ Financing contact information ready

Marketing Item	Purpose	Estimated Cost	Approved	Ordered By
EDDM postcards		\$	☐	
Paid social media		\$	☐	
Printing		\$	☐	
Photography		\$	☐	
Specialty signs		\$	☐	
Refreshments		\$	☐	
Other		\$	☐	

No paid marketing expense may be incurred without the homeowner's prior approval.

OPEN HOUSE MESSAGE

WHY SHOULD BUYERS SEE THIS HOME?

1. _____
2. _____
3. _____

OPEN HOUSE DAY CHECKLIST

Utah FSBO Professional Open House Checklist



Plan • Prepare • Promote • Host • Follow Up

BEFORE OPENING

- ☐ Arrive at least 30 minutes early
- ☐ Install directional signs
- ☐ Turn on all lights
- ☐ Open blinds and curtains
- ☐ Set a comfortable temperature
- ☐ Check for odors
- ☐ Secure valuables
- ☐ Confirm pets are removed or secured
- ☐ Place property materials
- ☐ Set up registration station
- ☐ Test the QR code
- ☐ Prepare refreshments
- ☐ Walk through the property one final time
- ☐ Confirm responsibilities with the team



DURING THE OPEN HOUSE

- ☐ Welcome each visitor
- ☐ Invite each visitor to check in
- ☐ Respect existing representation
- ☐ Monitor visitor flow
- ☐ Answer property questions appropriately
- ☐ Direct financing questions to the mortgage professional
- ☐ Record questions requiring follow-up
- ☐ Note buyer interest level
- ☐ Record second showing requests
- ☐ Record financing requests
- ☐ Avoid legal, tax, title, appraisal, and inspection advice
- ☐ Keep the experience educational and pressure-free



CLOSING THE EVENT

- ☐ Confirm all visitors have exited
- ☐ Collect registration materials
- ☐ Count visitors
- ☐ Secure doors and windows
- ☐ Remove directional signs
- ☐ Collect property materials
- ☐ Restore valuables
- ☐ Check for property damage
- ☐ Conduct a short team debrief

EVENT NOTES

Most common buyer question:

Strongest buyer reaction:

Second showing requests:

Financing questions raised:

Issues to address before the next showing:

BUYER FOLLOW-UP TRACKER

Utah FSBO Professional Open House Checklist

Plan • Prepare • Promote • Host • Follow Up

Buyer Name	Phone/Email	Represented?	Financing?	Interest 1-5	Next Step	Assigned To	Follow-Up Date	Done

QUESTIONS REQUIRING ANOTHER PROFESSIONAL

- ☐ Attorney: _____
- ☐ Tax professional: _____
- ☐ Title professional: _____
- ☐ Inspector: _____
- ☐ Appraiser: _____
- ☐ Contractor: _____
- ☐ Other: _____

FOLLOW-UP STANDARDS

- ☐ Property information sent
- ☐ Financing information sent
- ☐ Represented buyers directed to their Realtor
- ☐ Unrepresented buyers contacted only with permission
- ☐ First follow-up completed within 24 hours
- ☐ Homeowner received an event summary
- ☐ Buyer communication preferences were honored

RESULTS AND NEXT ACTION PLAN

Utah FSBO Professional Open House Checklist

Plan • Prepare • Promote • Host • Follow Up

EVENT RESULTS

Total Visitors: _____
Completed Registrations: _____
Represented Buyers: _____
Unrepresented Buyers: _____
Financing Conversations: _____
Second Showings Requested: _____
Serious Prospects: _____
Offers Expected: _____
Follow-up Appointments: _____
Marketing Cost: \$ _____
Cost Per Visitor, if Tracked: \$ _____

BUYER FEEDBACK

Most Common Positive Comment: _____
Most Common Concern: _____
Questions Requiring Follow-Up: _____
Property Features Buyers Questioned: _____
Pricing Feedback: _____
Property Features Buyers Liked Most: _____

MARKETING REVIEW

- ☐ Social media produced traffic
- ☐ Neighborhood outreach produced traffic
- ☐ Realtor outreach produced traffic
- ☐ Signs were effective
- ☐ Paid marketing was effective
- ☐ Registration process worked
- ☐ Financing support was useful
- ☐ Follow-up system worked

What worked best? _____

What should change next time? _____

NEXT DECISION

- ☐ Continue current price and strategy
- ☐ Schedule another open house
- ☐ Improve property presentation
- ☐ Adjust marketing
- ☐ Review pricing
- ☐ Schedule private showings
- ☐ Prepare for offers
- ☐ Consider additional professional assistance

Action	Responsible Person	Deadline	Completed
			☐
			☐
			☐
			☐
			☐

THE HOMEOWNER REMAINS IN CONTROL OF EVERY DECISION INVOLVING THE SALE.

Utah FSBO Professional Open House Checklist

Plan • Prepare • Promote • Host • Follow Up

You do not have to choose between selling completely alone and hiring a full-service listing agent. The Professional Open House Exchange gives you another option: professional preparation, buyer engagement, financing support, and organized follow-up—while you remain in control of your sale.

YOU KEEP CONTROL.

BUYERS RECEIVE A BETTER EXPERIENCE.

EVERYONE HAS A REASON TO PARTICIPATE.

SCAN TO LEARN MORE



Schedule a short planning conversation to review your property, your goals, and whether the Professional Open House Exchange is a good fit.

Call or text Tres Miller: 435-229-9797

Visit UtahHomeownershipAuthority.com

This workbook is provided for general educational and organizational purposes. It does not replace advice from an attorney, tax professional, title professional, inspector, appraiser, licensed real-estate professional, or licensed mortgage professional regarding a specific transaction.