



QUALICO®

HELPING BUILD
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SALES AGENT SAFETY BOOKLET

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Sales Agent Safety Policy

Purpose

Qualico is committed to ensuring the safety and health of our internal and external Sales Agents and strives to provide and maintain a workplace that is free of hazards, incidents, harassment, violence, and other on-the-job hazards associated with working alone.

Scope

This policy applies to all Business Units and internal and external Sales Agents working in show homes and suites in all regions throughout Canada and the United States.

Policy

At Qualico, we recognize that all individuals have the right to a safe and healthy work environment.

Qualico will strive to eliminate any foreseeable health and/or safety hazards which may result in property and/or environmental damage, incidents, or personal injury/illness, including hazards that may affect the physical, psychological, and social well-being of all persons.

Qualico internal and external Sales Agents shall contribute and take part in making the workplace as safe as possible and free of potential hazards, incidents, harassment, and violence.

Qualico will provide all Sales Agents with appropriate training based on their role to ensure that all employees are competent to complete their assigned tasks and assist in the development, maintenance and continuous improvement of Qualico's Health and Safety Program.

Responsibilities

Regional Vice President (RVP)

The RVP is responsible to ensure compliance with the spirit, intent, and provisions of this policy across all Business Units and brands. Throughout all regions, the RVP is accountable for the consistent and satisfactory application of this policy.

Vice Presidents (Brand and Business Unit)

Each Business Unit and brand Vice President are responsible for:

- Ensuring that the requirements of this policy are fully implemented, maintained, communicated and actively supported in their Business Unit.
- Monitoring the effectiveness of communication, training, and day to day ongoing implementation of this policy.
- Ensuring resources required in support of this policy are authorized and approved.

Regional Safety Manager

Regional Safety Managers are responsible for:

- Providing ongoing information, instruction, and training for the personal safety of all sales staff.
- Monitoring and reporting on compliance with the spirit, intent, and provisions of this policy.

Sales Managers

Sales Managers are responsible for:

- Ensuring all new hires receive the safety orientation.
- Ensuring that all Sales Agents are adequately trained and understand the requirements of this policy and any changes made to it.
- Ensuring that Sales Agents have a formal work alone plan with an assigned Work Alone Buddy to assist, if required.
- Ensuring these policies and plans are followed at all times.
- Enforcing the safety policy and addressing any issues of non-compliance.
- Ensuring that all show homes and suites are equipped and maintained in compliance with the safety policy, this includes a monitored alarm with panic fob, security camera with appropriate signage, and a work alone app installed on the Sales Agent's cell phone.
- Keeping an awareness of the changing risks to Sales Agents, specific to working in show homes and suites.
- Including safety on the agenda of the regularly scheduled sales meetings.
- Having an open-door policy, when it comes to safety and taking feedback from Sales Agents seriously.
- Encouraging Sales Agents to talk about what would help them feel safer while working on site.
- Following up on suggestions and communicating with the Sales Agents if changes are made in response to the feedback.
- Reporting any incidents of workplace violence and harassment, or instances where there was a threat of violence or harassment, as soon as possible to Human Resources and the Vice President.

Sales Agents

Sales Agents are responsible for:

- Reviewing and being familiar with the safety policies, rules and tips provided by the company.
- Complying with the spirit and intent of the safety policy.
- Receiving and keeping a copy of the safety policies, rules and tips as a printed copy, link to the online document, or local file on a laptop. These copies should be readily available and easily accessible at all times.
- Keeping up to date on all Safety Alerts which are provided after a safety incident has occurred.
- Ensuring all emergency response equipment has been placed in the show home, such as a fire extinguisher, first aid kit, eye wash station, and a means of communication.
- Inspecting the show home and testing the alarm system, panic fob and buddy system, as per your regional requirements to ensure they are functional.
- Reporting any safety concerns regarding the show home, either directly to the Sales Manager or through the Show Home Inspection form.
- Reporting any incidents of workplace violence and harassment, or instances where there was a threat of violence or harassment, as soon as possible to the Sales Manager. If the Sales Manager is the reason for the complaint, the report should be made to Human Resources.
- Accompanying all site visits with the client and complete the site safety assessment form and deem the site safe, prior to entering. There are to be no site visits completed with Sales Agents and clients while high hazard work is being performed. If there is a concern with a client on site, provide the Sales Manager as many details as possible, and they will act on the Sales Agents behalf.
- Reviewing and ensuring that the Safety Agreement for Clients has been signed by the purchaser. No keys are to be given to the client until the possession date.

Sales Agent Safety Rules

Sales Agent Safety Rules apply to all Qualico Sales Agents and include rules or policy above and beyond those stated in Qualico's Health and Safety Manual. These rules are intended to supplement the content of the Health and Safety Manual and it is expected that Sales Agents will receive job-specific training to ensure an understanding of the health and safety rules that apply to their position prior to commencing work on any Qualico Work Site.

- Ensure clients have reviewed and signed a copy of the Safety Agreement for Clients. The Safety Agreement outlines the rules for clients at the construction site.
- Pre-arrange all visits with clients to houses or units with the construction department to ensure no construction work is scheduled at the time of visit.
- Sales Agents are to complete a Site Assessment prior to the site visit. If the site is deemed to be unsafe, the visit may need to be cancelled or rescheduled.
- Sales Agents must accompany all Work Site visits with the client and verify site safety prior to entering.
- Ensure clients are aware that the worksites are hazardous. Sales Agents must have authorization to enter any construction work site.
- Clients, inspectors or representatives are not permitted to enter the construction site alone.
- Sales Agents are to verify that the client has the appropriate PPE to visit the construction work site. Appropriate PPE for clients on our work sites must include a hard hat, high-visibility vest, and closed toe footwear.
- Sales Agent PPE requirements include a hard hat, high-visibility vest, and Qualico-approved safety footwear.
- Ensure the keys to the property are not provided to the client ahead of the possession date and key release.
- Ensure the client is aware that children, defined as people under the age of 16 in Canada or under the age of 12 in United States are not permitted to attend site visits.
- Exterior walks and steps must be kept hazard free during all seasons.
- Ensure no clients are accessing the balconies until guardrails are installed.
- Ensure no smoking or vaping occurs on any construction site or within the show home.

The above Safety Rules are considered the minimum standard on all Qualico Work Sites.

Consult the Regional Safety Manager for additional regional-specific Safety Rules that may apply.

Sales Agent Safety – Workplace Controls

Qualico is committed to ensuring the safety and health of our internal and external Sales Agents and strives to provide and maintain a workplace that is free of hazards, incidents, harassment, violence and other on-the-job hazards associated with working alone. Due to Sales Agents primarily working alone, they are at increased risk for certain hazards that require additional training and preventative measures.

When setting up a show home for Sales Agents to work out of, there are 4 key safety features in each show home:

- A monitored alarm system with personal panic fob.
- Access to a cell phone.
- Video Surveillance in key locations.
- The layout and permitted contents of a show home.

Alarm System and Panic Fob

All show homes are equipped with an alarm system and panic fob which is connected to an approved alarm company for remote monitoring. The alarm monitoring company is also responsible for acting when the panic fob is pressed, ensuring that police are dispatched to the show home location, as soon as possible.

- Sales Agents will be trained by the Sales Manager on how to arm, disarm, and test the alarm system in each show home.
- Sales Agents are to ensure they are familiar with the alarm system and routinely test it to ensure it is working properly.
- Sales Agents should not hesitate to activate the panic fob or alarm system if they feel exposed to an uncomfortable or potentially unsafe situation.
- The alarm in the show home should be set up to make an audible chime whenever the door opens. This will alert the Sales Agent that an individual has entered the show home and signals the individual that the Sales Agent has been notified of their presence. If the audible alarm is disabled during high traffic days, the Sales Agent will be required to reset the audible alarm as part of closing the show home at the end of the day.
- Panic fobs are also integrated with the alarm system and must be worn at all times while working in the show home.
- Panic fobs are only effective while inside of the show home. In the event of an emergency or incident, if the Sales Agent leaves the show home, then other means of communication, such as a cell phone will be required.
- The panic fob may trigger an audible or silent alarm. Sales Agents should verify with their Sales Manager which type of alarm will be triggered at the show home location.

Sales Managers will ensure that the panic fobs are tested quarterly for proper function and performance.

Cell Phones

As noted in the section above, cell phones can be utilized as a safety control anytime a Sales Agent is working outside of the show home.

Sales Agents are to have access to a cell phone when working alone and it should be kept charged and easily accessible at all times.

It is important for Sales Agents to remember to take the cell phone when leaving the show home to accompany clients on site visits, tours of feature homes or at the end of the day.

The following Emergency Contact Numbers should be added to a Sales Agents cell phone:

- Emergency Services
- Roadside Assistance
- The Builder
- The Sales Manager
- Other Sales Agents or Co-Workers
- Family Members or Friends

Video Surveillance

All show homes are equipped with cameras at show home entry points, reception areas of offices or where surveillance is deemed necessary to protect our sales agents, contractors, individuals, and company property from harassment, violence, or loss.

Additional information regarding video surveillance can be found in the Video Surveillance Directive. (link video surveillance page here in the manual).

Layout and Permitted Contents of a Show Home

It is important to ensure that Sales Agents understand the importance of the layout of the home and the items that are stored or brought into the home for staging purposes.

The following safety features ensure that the layout of the home is designed to mitigate the hazards, incidents, harassment, violence, and other on-the-job hazards associated with working in a show home and working alone.

- Main floor sales offices are to be created, where the floor plan allows.
- If a sales office is to be set up in a bedroom, the door to that room is to be removed.
- The area surrounding the show home is to be well lit. The lighting will maximize visibility and reduce places where individuals may hide.
- Show homes will receive regular maintenance to ensure lighting and door locks are functioning correctly, as well as ensure that the ice and snow are cleared from access points.

- Weapons and potential weapons are not permitted in the show home. This includes cutlery, knives or fireplace tools.
- Show homes are to be equipped with a fire extinguisher and a first aid kit.
- As a Sales Agent, be familiar with the location of both the fire extinguisher and the first aid kit.
- Sales Agents are also responsible for ensuring the first aid kit is checked regularly and notifying the Sales Manager when the first aid kit needs to be restocked.

[Additional Workplace Controls](#)

Along with the Workplace Controls mentioned above, Sales Agents will also receive the following training:

- A generic safety orientation and Sales Agent Safety Training (IQA) prior to starting work.
- How to complete work alone plans, use work alone apps; if applicable as well as the panic fobs within the show homes.

Video Surveillance Directive

Directive

Qualico is committed to ensuring a safe environment for all sales agents, contractors and individuals who work in or visit our show homes while simultaneously respecting an individual's right to privacy.

Purpose

The purpose of this directive is to ensure that any use of video surveillance by Qualico is done in a manner that complies with Private Sector Policy Legislation as well as applicable state and federal laws in the United States and balances the need for Qualico to conduct video surveillance and to respect individuals' right to privacy.

Scope

- All show homes are to be equipped with cameras at show home entry points, reception areas of offices, or where surveillance is deemed necessary.
- Video Surveillance solutions will be chosen to reflect the least privacy invasive option necessary to ensure the security needs of Qualico.
- Sound recording is strictly prohibited and all video surveillance cameras with sound recording functionality must have this function turned off or disabled.
- Surveillance will not be used to observe or analyze employee performance.
- Surveillance will not be used to observe or analyze clients or individuals for any other use related to the collection of marketing or business intelligence.
- Signage must be posted at entry points and clearly visible to the public so individuals may choose to protect their privacy by leaving the premises.
- Recorded images will be stored in a secure location, with limited access and images destroyed when they are no longer required for business purposes.
- Recordings will not be released to any party without approval from Qualico legal counsel.

Responsibilities

Sales Manager

- Ensure that all show homes are equipped with functioning cameras to protect sales agents, contractors, individuals, and company property from harassment, violence, or loss.
- Ensure all cameras are tested quarterly for proper function and performance and provide the Regional Qualico Health and Safety Team with a record of the test and the results.
- Complete one (1) inspection per month on all sales centers under their supervision.

Regional Safety Manager

- Ensure that cameras and surveillance signage is installed and posted in show homes, by conducting inspections on active show homes.
- If requested by Qualico Legal Counsel, ensure to provide a copy of a recorded event.

The safety information in this directive does not take precedence over the Private Sector Policy Legislation.

Working Alone

Work Alone Plan

When working alone and in the absence of a work alone app, it is important to have a work alone plan established in the event of an emergency.

Below are the key steps to a work alone plan:

Establish a Work Alone Buddy:

A Work Alone Buddy can be someone who the Sales Agent can:

- Reach quickly and easily by phone.
- Check in regularly.
- Rely on if they feel uncomfortable.
- Reach out to in an emergency if they cannot use the panic fob or call 911.

A Work Alone Buddy can also be another Sales Agent in the area, a contact with the builder, or the Sales Manager.

External agents can contact other people such as a manager, another agent within their company, a family member, or a friend.

Communicate with the Work Alone Buddy:

It is important to create a communication plan with a Work Alone Buddy, ahead of time.

A communication plan can include:

- Confirmation of when the Work Alone Buddy should expect the Sales Agent to check in with them, when the Sales Agent is leaving the show home, or when the Sales Agent is ending their shift.
- Establish two levels of distress codes, so that assistance can be requested without alerting the client.
 - For Example: If the Sales Agent is feeling uncomfortable with the client and would like their Work Alone Buddy to come by so they are not alone, the Sales Agent could request that the Work Alone Buddy bring the **“Yellow File.”**
 - For Example: If the Sales Agent feels that the situation has become dangerous and they are unable to press the panic fob or call 911, the Sales Agent can call their established Work Alone Buddy and request that they need the **“Red File”** right away.
- If no communication has been established between the Sales Agent and the Work Alone Buddy, the Work Alone Buddy must attempt to call the Sales Agent. If no response is received, the Work Alone Buddy must contact the Sales Manager.



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The use of a working alone app may be applicable in certain regions, for more information about the use of the working alone app, please reach out to your Regional Qualico Health and Safety Team.

For more information regarding working alone, click the following link to refer to the [Safe Work Practice for Working Alone](#).

Working Alone Best Practices

As a Sales Agent, most of the work conducted will be in a show home or a feature home, where they will be alone with clients. It is important for Sales Agents to understand the requirements of working alone and how to ensure they are kept safe while working alone.

Below are best practices that can be utilized to ensure Sales Agents are kept safe when working alone.

Working in the Show Home:

- Sales Agents can offer to let the client tour the show home independently. The client can regroup with the Sales Agent after the tour with any questions or comments.
- Avoid touring large groups alone, if the client insists on the Sales Agent joining the tour, ensure that the Sales Agent is accompanied by another Sales Agent or their Work Alone Buddy.
- When leaving the show home at the end of the day, Sales Agents are to ensure that the doors are locked, and the show home alarm is armed.
- If a Sales Agent suspects that an individual is still in the show home when leaving, it is important that they do not go look for them, announce that the show home is being closed, leave, and lock the premises. The Sales Agent should ensure to call the Sales Manager or the local police department.
- The Sales Agent should have their keys or key card ready when approaching the show home. Sales Agents should not spend time at the front door searching inside of a bag, purse, or pockets.
- While clients are in the home, Sales Agents should be mindful of distractions and be cautious about answering calls or text messages and be aware when groups of clients split up.
- Sales Agents are to ensure a panic fob is being worn and visible and advise clients about the cameras on site.

Vehicle Safety:

- Keep vehicle keys close by and accessible.
- Vehicles are to be kept in good working condition and ensure there is fuel in the tank.
- Park in well-lit areas close to the show home. Vehicles should not be blocked in by other cars, and if parked in the driveway, ensure that it is backed in for the easiest exit.
- Sales Agents are to avoid drawing attention to their vehicle, by always keeping valuables out of sight.

Social Media:

- Sales Agents should know how to report, block, and filter content on social media sites.
- Ensure privacy settings are personalized. Sales Agents can adjust the privacy settings to a preferred comfort level and select options that limit who can view their information and profile.
- Be selective with friend requests. If the individual is not familiar, Sales Agents should not accept their request.
- If possible, Sales Agents should turn off their geolocation. If sharing the location is important to the Sales Agent, it may be of benefit to wait to tag the location after leaving the area.

In the Event of an Incident

If a Sales Agent encounters an uncomfortable person or an individual with intent to cause harm, it is crucial for the Sales Agent to always trust their gut and watch for signs that a person may be agitated or have an alternative motive for being in the show home.

Some examples of the alternative motive include, but are not limited to:

- Scanning the room purposefully, checking windows and the location of cameras.
- Showing more interest in the Sales Agent than the show home.
- A sudden change in body language, tone, and volume in their voice, as well as eye contact during the conversation.
- Pacing or fidgeting, clenching their jaw or fists.
- Using tactical movement to get the Sales Agent to a specific location in the show home.

De-Escalate and Manage the Situation:

It is important to remain as calm as possible during an uncomfortable or potentially unsafe situation. In a potentially unsafe situation, it is important to try to de-escalate and diffuse the situation.

To attempt to de-escalate and diffuse the situation, the Sales Agent should:

- Move away from the person and maintain a safe distance; 6 feet or more is ideal.
- Where possible, the Sales Agent should move off to the side of the person, behind a piece of furniture or with a kitchen island separating the person from the Sales Agent. Sales Agents should not stand directly in front of them.
- Always keep the person in view. Sales Agents are not to turn their back on the person.
- Rely on non-verbal communication to help de-escalate the situation. This can include relaxed facial expression, keeping hands open and visible and lowering the tone of the Sales Agent's voice.
- Always have an excuse in mind, such as needing to make a phone call, to leave the room and make space.

Get out of the Situation:

If de-escalating the situation does not work and the Sales Agent feels that their safety is threatened, the Sales Agent can take the following steps to ensure that the local police department is notified.

- If the Sales Agent is in the show home, press the panic fob that is connected to the alarm keypad.
- If the Sales Agent is outside the show home or cannot use the panic fob, the Sales Agent must call 911.
- Ensure to stay on the line with the operator until the police arrive.
- In the event the attacker tries to take the phone from the Sales Agent, the Sales Agent is to throw their phone to an inaccessible location such as under a desk or table to ensure the call is not disconnected.

While the police are on their way, it is vital to ensure that Sales Agents take the following steps to ensure they are safe.

- If possible, the Sales Agent should attempt to evacuate the area. Keep an eye out for doorways, windows or stairs and develop a plan of how they are going to get out as quickly as they can.
- If the Sales Agent is *able* to evacuate the area, the Sales Agent is to relocate to a safe location, such as a show home next door, a nearby construction office or driving a safe distance away.
- If the police were summoned using the panic fob, the Sales Agent is to call 911 once they are in a safe location to update the local police department of their current location.
- If the Sales Agent is *unable* to evacuate the area, then the next suggestion would be to hide. Look for ways to ensure distance is established between the Sales Agent and the threat until the police arrive.
- The Sales Agent should be as quiet as possible, including silencing their phone or other items that may make noise.
- If evacuating the area or hiding in a safe location are not successful, then the Sales Agent may have to defend themselves.

It is important to remember that when law enforcement first arrives, their priority will be to secure the attacker.

After an Incident

After an incident occurs, it is very important for Sales Agents to:

- Record all of the details that can be remembered about the person. The Sales Agent can write notes or create a voice recording of the details.
- Notify the Sales Manager; they will provide guidance on the next steps.
- Remember that there may be additional reporting or statements required by the local police department.



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Resources

- [Formal Hazard Assessment – Area Sales Agent & Formal Hazard Assessment – Sales & Marketing Manager](#)
- [PDA – Area Sales Agent & PDA – Sales & Marketing Manager](#)