AI *Playbook*

Large Language Models

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Welcome to the *all-new* AI Playbook

You're an entrepreneur… and a professional consultant, salesperson, marketer, negotiator, local economist, project manager, and some days, a therapist. You're a real estate agent and you wear dozens of hats every single day. But you didn't get into this business to spend your hours agonizing over the perfect property description or yet another way to say "charming bungalow" on social media while your paperwork piles up. You got into this business to connect with people and help consult them through one of the biggest decisions of their lives.

For several years, "Artificial Intelligence" has been just a buzzword often accompanied by intimidating headlines and confusing technical jargon. It's been easy to tune it out or to feel a sense of dread that AI is coming to take your job.

The truth is that AI won't replace great real estate agents.

AI can't build trust with a nervous first-time homebuyer, it can't navigate the delicate emotions of a seller leaving their family home, and it can't read the room during tense negotiations.

What it *can* do is become the best, most efficient–and most importantly–**unpaid** assistant you've ever had. With the right plan and actions, AI can rescue you from the mundane and repetitive activities that drain your time and energy.

> **AI isn't coming for your job; it's coming for your busywork, and you'd be crazy not to let it.**

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Before we get into how to start using AI today, let's unpack seven myths around using it.

1. **MYTH:** AI understands just like a human.

   TRUTH: All generated responses are curated by patterns identified by the context you provide.

2. **MYTH:** AI is always accurate.

   TRUTH: AI can make things up and be totally wrong at times. That's why you must check and double-check everything AI builds for you that you're putting your name and reputation behind.

3. **MYTH:** You need to be a "tech person" to use AI effectively.

   TRUTH: It's been built specifically so that everyone can use it. If you can talk, type, or use a camera, you can use AI.

4. **MYTH:** AI-generated content is robotic and generic.

   TRUTH: AI is a mirror. It reflects what you give it. Feed it your unique voice and style, and it will amplify your personality.

5. **MYTH:** AI can only be used like a search engine.

   TRUTH: AI is so much more. It can be used to role-play conversation frameworks, educate you on specific topics, and improve things like your listing presentation.

6. **MYTH:** Real estate is a people profession based on relationships; AI can't help with that.

   TRUTH: AI can save every real estate agent time and money from the first time they start using it. AI won't replace the real estate agent as the trusted fiduciary for their clients, but it will make real estate agents who use it more effective and better at what they do.
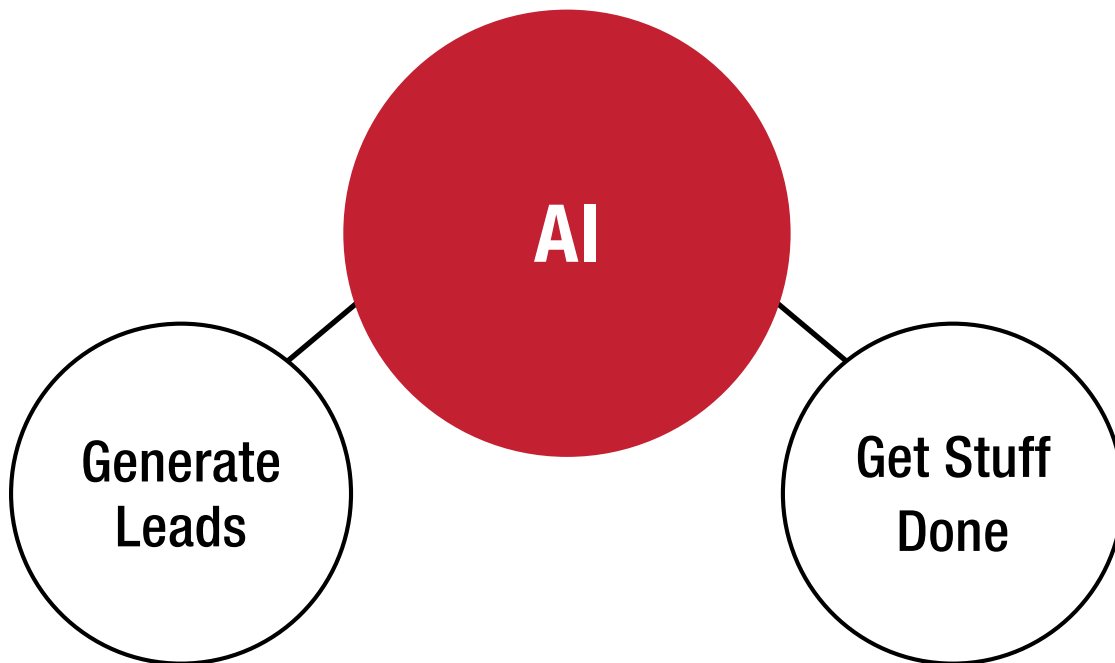
7. **MYTH:** I have time.

   TRUTH: You don't. Your clients and future clients are already using it… and they expect you to be there.

AI is huge. The world it encompasses is ever-reaching and constantly growing. When topics are huge and all-encompassing, it's easy to get lost in "interesting" or "academic" discussions.

That's not how we roll. We're going to oversimplify "AI" to fit a very narrow use case—helping real estate agents maximize their time and income.

We can think about AI in two buckets: generate leads and get stuff done.

We've written two playbooks - one for each of the buckets. As AI evolves, so will these playbooks. This playbook teaches you how to "get stuff done" by using Large Language Models (LLMs).

We wrote this playbook first because mastering LLMs and how they function is the first step to fully understanding how to leverage them and other things to generate leads. Imagine trying to create a great commercial, but you've never watched TV… you need to start somewhere.

> ## THIS IS STEP 1!

AI Playbook:
Large Language Models

1 **Understand Large Language Models (LLMs)**

2 **Pick Your LLM**

3 **Personalize Your AI Assistant with a Master Prompt**

4 **Perfect Your Prompts**
BONUS: 7 Hacks to Take Your Prompts to the Next Level

5 **Put Your Prompts Into Action**

(1) Understand Large Language Models (LLMs)

The following pages explain **Large Language Models (LLMs)** and how to put them to work for you today.

LLMs are incredibly complex code strands that are trained on massive amounts of textbooks, websites, articles, and other materials to recognize patterns in how we use language. They don't *"think"*. They predict based on the words and context used in your prompts. In almost all cases, you'll hear LLMs referred to as *"AI assistants"*. They perform a task at your request. An example is asking ChatGPT to create a meal plan tailored to your preferences. You asked for something specific, and they performed a task by creating a weekly meal plan.

That's it. You don't need to know anything more technical than that to be a successful user. Your job? Give it a well-designed prompt that triggers a consistent and desired response.

Think of it like this:

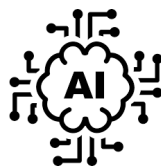**INPUT** + **AI ENGINE** → **OUTPUT**

PROMPT + CONTEXT
1. Text
2. Images
3. Video
4. Files
5. Tools

+

AI ENGINE
1. LLM App
2. API Connection
3. MCP Connection

=

OUTPUT
1. Text
2. Images
3. Audio
4. Video

With that baseline, let's meet a few LLM tools you can use and how to get started with them.

(2) Pick Your LLM

Here's a quick rundown of 5 commonly used LLMs and their strengths:

ChatGPT (Jack of All Trades) Developed by OpenAI, this is the most used AI in the world. Think of it as your easy-to-work-with team member with few weaknesses. It's good at almost everything.

Gemini (Integrated Researcher) Has an advantage of being connected to the Google ecosystem and the Web. Gemini is a powerful research assistant that saves you time within the Google Workspace.

Claude (Polished Writer & Nerdy Coder) Excels with natural conversations and writing complex code. Think of Claude as your esteemed editor who can pull all-nighters writing lines of code for that app you've been dying to launch.

Perplexity (Answer Engine) Is less of a creative writer and more of a direct answer engine that cites its sources while saving you time surfing the wrong websites. Think of it as a meticulous fact-checker that excels at specific questions and answers.

Grok (Edgy Brainstormer) Designed to be more conversational, witty, and maybe even a bit controversial. Grok has many of the same features as ChatGPT with the added feature of real-time information from X.

Try This: Take 5 minutes to download one or each of them and create an account. Every use case in this Playbook works on the free tier, though daily usage limits may apply. Premium plans, ~$20/month, remove those daily usage caps. If you hit the free limits often, upgrade the app that feels easiest to use and supports text, images, voice, file uploads, and transcription.

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③ Personalize Your AI Assistant with a Master Prompt

Steve Jobs famously recounted a Scientific American study comparing the efficiency of all species. The condor was nature's most efficient mover… until a human hopped on a bicycle. For Jobs, the computer was a "bicycle for the mind." The bicycle doesn't pedal for us, but it transforms our effort into something exponentially more powerful.

AI can transform your effort into even more! If the computer was the "bicycle for the mind" during Job's time, think of AI as a *tandem bicycle*. You sit in the front seat deciding where to go, when to turn, and at what pace. AI sits squarely behind you adding power and partnership to everything you do.

→

Just like any good cycling partner, AI works best when it knows your preferences and remembers your journey together. This is where two critical features transform AI from a helpful stranger into your trusted companion: personalization and memory. A "Master Prompt" combines personalization and memory tailored directly to you.

Personalization: Acts as your default instructions for all future interactions. You fill it out once to set expectations of your preferred writing style, tone, format, and role. This is how your assistant will interact with you each time until you make updates.

Memory: With memory, AI acts like your executive assistant that never forgets key **facts about you, your goals, your quirks,** and **past conversations** so you don't repeat yourself.

Pro Tip: Want your LLM to remember new details about you? Just say "Remember this…" and watch your assistant get smarter by adding new details to your memory.

Use the worksheet on the following pages to help personalize your AI assistant to you.

Step 1: Identify Your Preferred Communication Style

Choose 3-5 Core Communication styles you prefer your assistant to use when responding to you. Circle them from the list below or write your own.

Friendly	Formal	Gen Z	Direct	Patient
Encouraging	Skeptical	Curious	Calm	Enthusiatic
Analytical	Creative	Reserved	Empathetic	Objective
Humorous	Serious	Poetic	Succinct	Detailed

When I ask for advice:

☐ Give me multiple options to consider.

☐ Recommend the best single approach.

☐ Walk me through pros and cons.

☐ Give me layered guidance.

When explaining complex topics:

☐ Use plain English. No jargon.

☐ Start with the big picture and then dive into details.

☐ Give me a step-by-step breakdown.

☐ Use analogies.

☐ Use real-world examples.

☐ Use diagrams or visual descriptions.

When I make mistakes or need corrections:

☐ Point out errors directly and clearly.

☐ Suggest improvements gently.

☐ Ask questions to help me figure it out.

Step 2: Add Custom Personal Insights

What key details should your assistant know about your personal life to make your day-to-day life more effective?

My Name	
Family or Key People	
My Hobbies/Interests	
My Core Values & Beliefs	
My Preferences *(diet, travel, movies, etc.)*	
Top 3 Personal Goals	
My Health Goals & Habits	
Off-Limits Topics*	

Recommended if your children use your electronics. For example: "When prompted with content regarding [Santa Claus, family traditions, religion, etc.], always respond [preferred response]."

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Step 3: Add Your Custom Business Instructions

What key details should your assistant know about your business to increase the chances of your success?

Industry & Niche	
Core Services	
Ideal Customer Profile	
Biggest Business Pain Points	
Short-Term Goals (30-90 days)	
Long-Term Vision (3-5 years)	
Key Business Metrics I Track	
Business Tools & Apps	

*Copy your profile responses above and paste them into your AI assistant. ➡️ Then ask: "Do these instructions and profile details about me make sense?"

Adjustments: After using your personalized assistant for a week, note what you'd like to change:

_____

_____

_____

At the time of publication of this playbook, a U.S. federal court has ordered OpenAI to indefinitely retain some ChatGPT and API data (based on the subscription level) as part of ongoing copyright lawsuits by The New York Times.

When using personalization and memory features, it's important to be mindful of your privacy. Do not input any personal, confidential, or sensitive information that you do not have permission to upload. Even with permission, consider whether uploading such information is appropriate. Check your data-sharing settings often to make sure they match your privacy preferences.

(4) Perfect Your Prompts
BONUS: 7 Hacks to Take Your Prompts to the Next Level

What is a prompt?
A prompt is an input that starts a conversation or triggers a response from an LLM. A prompt can also be text, an image, a file, or audio.

What is prompt engineering?
Prompt engineering is the process of writing great instructions to consistently get the results you want from AI.

Because AI responses often vary, the best prompts combine structure with some trial and error—so it's a science and an art. Our four-part prompting framework (RICE) improves your chances of getting useful outputs by helping you create better inputs. It works with most tools, though some models (like Perplexity or those built for reasoning) may need slight adjustments.

PERFECT PROMPT MODEL
A well-designed prompt is key. Use the following model: R-I-C-E

ROLE: Explain who the assistant is, how it should communicate, and what its main goals are.

> *Example: "Act as an expert copywriter, specializing in cold email conversion."*

INSTRUCTIONS: Tell the model what you want it to do and not do. Set rules and give clear directions. Use clear tone words to shape the response, like formal, casual, friendly, serious, or humorous.

> *Example: "Write an email using the P.A.S. framework. Keep it under 150 words. The style should be succinct, conversational, and punchy."*

CONTEXT: Add any extra info the model needs, like data it wouldn't already know. *Put this near the end since it may change with each use.*

> *Example: "The target audience is investors with 40+ single-family doors. They value high-ROI and off-market deals and want an agent who proactively hunts for opportunities."*

EXAMPLES: Provide sample inputs of the ideal responses. This helps guide the model's responses to your liking.

> *Ideal Response:*
> "Subject: Off-Market Opportunity – Zero Competition
> Hi [Investor Name],
> [Body]:
> Every day, investors tell me that finding high-yield inventory is harder than ever; everyone's chasing the same deals. While most scroll the MLS waiting for inventory, we're sourcing direct-to-seller off-market properties with 9-11% cap potential.
> I've got a 12-unit in East Austin. It's perfect for light value-add, clean financials, no bidding war.
> Want the details?
> [Signature]

Be specific. Clear, precise prompts give you more accurate and useful results, so avoid vague instructions. Start with a first draft, review the response, and make changes. You might need to change the wording, add context, or simplify the ask to get better results. Repeat this process until the output meets your needs.

Pro Tip: Show your prompt to a colleague. Ask them to follow the instructions. If they're confused, LLMs will likely be, too.

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Improve Your Prompts

You don't have to do all the work yourself. Once you have a basic prompt, you can ask AI to make it better for you!

Simply add this command before your prompt:

> Take my prompt below and rewrite it to be more clear, detailed, and effective to use with an LLM app like you. [PROMPT]

This simple solution shows you what an improved prompt looks like and gives you an improved answer based on it. It's a great way to learn and improve your prompting.

Pro Tip: Use ChatGPT's *GPT tool* to find Prompt Engineering tools that improve your prompt quality and output clarity.

1. Go to: chat.openai.com/gpts or Open ChatGPT --> Explore GPTs --> Click the "GPTs" button on the sidebar.

2. Search with Keywords using terms like:
   - * `Prompt Engineering`
   - * `Prompt Optimizer`
   - * `Prompt Generator`

3. Save the best prompts in Project folders or within notes to use regularly.

BONUS: 7 Hacks to Take Your Prompting Skills to the Next Level

Using the **RICE** framework will put you ahead of the game, but let's add some secret weapons to your arsenal. Think of these as power-ups you can add to your prompts to get even more insightful, strategic, and useful results.

1. "Clarification" Hack:
"Ask Me Questions First."
What it is: Before the AI starts writing, command it to ask you clarifying questions to ensure it fully understands the task. This prevents it from making bad assumptions.

> "...Before you begin writing the property description, ask me at least three clarifying questions about the target buyer or the home's unique selling points to ensure that your response is perfectly aligned with my goals."

2. "Show Your work and Cite Your Sources."
What it is: When asking for data or market analysis, demand that the AI backs up its claims with sources. This is crucial for fact-checking and building your authority.

> "...Analyze the current mortgage programs for first-time homebuyers in Austin, TX, that provide grants, 0% down, $0 PMI, or other preferred financing for homebuyers. For every key claim you provide, cite the source with a URL."

3. The "Action Plan" Hack:
"Break It Down."
What it is: Turn a big, daunting project into a series of clear, manageable steps.

> "...I need to create a 3-month marketing plan for my real estate business. Break this problem down into smaller parts. List each sub-problem, and then provide the key action steps for each one."

4. The "Options" Hack:
"Give Me Three Different Solutions."
What it is: Instead of accepting the first idea, ask the AI to generate multiple options, each with pros and cons. This helps you think strategically and pick the best path forward.

> "...I need a marketing hook for my new luxury condo listing. Give me three different hooks: one focused on 'Exclusivity,' one on 'Lifestyle,' and one on 'Investment Value.' For each solution, list the pros and cons."

5. The Second Opinion Hack:
"Critique Your Own Answer."
What it is: After AI provides an answer, ask it to act as a critic and find the weaknesses in its work. This is a shockingly effective way to refine strategic thinking and copywriting.

> "Now, critique the plan to achieve my goals that you just wrote. What are its weakest points, and how would you fix it to make it more effective?"

6. The Blind Spot Hack:
"What Am I Missing?"
What it is: This prompts the AI to think outside the box and identify factors you're not considering. It's a powerful way to uncover hidden opportunities or risks.

> "I'm hiring a Director of Operations for my real estate team. They'll manage systems, people, and finances. Here are the reasons why this is my top candidate. What blind spots or risks might I be missing?"

7. The "Steel Man" Hack:
"Argue the Opposite View."
What it is: Ask the AI to take the opposite side of an argument to help you prepare for objections and stress-test your logic.

> "...I'm planning to lower the splits on my real estate team. My thesis is that it's too competitive. I'm getting beat on splits and the opportunity of growth is worth a little less money. Now "steel man" the opposite view. What are the three strongest arguments for not making this change?"

Make AI Work for You

By now, you understand how to use AI to generate high-quality results that improve your real estate business. You've mastered the **RICE** framework and the power-up hacks, now let's bundle them together into an efficient system that fits your busy life. The goal is to stop repeating yourself and make the AI feel like it truly knows you.

These productivity tips will help you get better results in a fraction of the time, all using free tools.

1. <u>Recurring Tasks</u> act like automated reminders that you schedule to show up at a set time and repeat—daily, weekly, etc. They act like a done-for-you executive assistant, providing you exactly what you need, when you need it, and always on time. Need to create social media content, but have writer's block? No problem! Automate the ideas, the hooks, and the copy to land in your inbox every day. Keep skipping your 4-1-1 and your goals? Have recurring tasks show up weekly to ask goal-focused questions that keep you on track for your best year ever.

2. <u>Projects</u> are like file folders and smart workspaces. Projects bundle everything related to a specific task, deal, or initiative, so nothing gets lost in your chat history. Want to write listing descriptions in a different tone than your default style? Create a Listing Project, apply custom instructions, and upload related files. ChatGPT will follow the tone, remember the context, and keep everything in one focused workspace.

3. <u>Perplexity Voice Assistant</u> is a voice-activated AI assistant that gives fast, sourced answers and launches tasks like setting to-do reminders, sending emails, or booking travel—hands-free. Busy agents use it to get market data, prepare for meetings, and reply to emails - all while multitasking on the go. Unlike Siri, Perplexty Voice Assistant is intelligent and pulls real-time data while connecting with outside apps. It's faster, smarter, and actually useful on the go.

4. <u>AI Voice Apps:</u> Most adults read just 22 minutes a day, but spend up to 6 hours on spoken-word audio. Audiobooks, talk radio, and podcasts dominate because they fit real life: commutes, workouts, cooking, walking. Free AI tools like ElevenLabs Reader and NotebookLLM turn written content, unread articles, research, and saved PDFs into lifelike audiobooks and podcasts. Can't find more time to read? Don't. Just shift formats. Turn that stack of unread papers into AI-generated audiocasts to meet your busy demands.

(5) Put Your Prompts Into Action

Below are just a few examples of how you can put your prompts into action today!

1. Marketing and Client Engagement

1. 36-Touch Frameworks that Convert
2. Social Content Creation
3. Message Matching
4. Newsletter Generator
5. Relocation Guides
6. Housing News

2. Market Education + Skills

1. Role Play
2. Social Intelligence
3. Competitive Analyst
4. Operations Analyst

3. Property and Transaction Support

1. Property Visualizer
2. Condition Consultant
3. Inspection Estimator
4. Low Appraisal Insights
5. Red Flag Finder

4. Strategy

1. Tax Strategy Optimization
2. Mortgage Mastery

5. Operations Efficiency

1. 4-1-1 Coach
2. Perfect EA Handoff

Marketing and Client Engagement

36-Touch Frameworks

Now that you know how to use AI, what's next is to broadcast your message and build your database through consistent touches.

You could prompt your AI assistant to build your 36-touch campaign, but the output often reads robotic, like it's one-size-fits-no-one. A better approach? Build the exact 36-touch you want, by prompting AI to use proven copywriting techniques, like the ones top marketers and communicators use, to turn your touch campaigns into an outreach system that reads almost like Phil Jones wrote it himself: "How would you feel if… your accent was just like the royal family?"

Problem-Agitate-Solve (PAS) framework leverages the psychological principle that people are more motivated to move away from pain than they are to move toward pleasure. By first identifying and amplifying a problem the reader is already experiencing, you create a powerful sense of urgency and a deep desire for the solution you're about to offer. Name the pain, agitate it, and then give the cure.

Pro Tip: Best for cold traffic and email opens.

Attention-Interest-Desire-Action (AIDA) framework that intuitively guides readers through the natural progression of a purchasing decision. It breaks down the wall of reader's indifference by capturing their attention, nurturing their interest into a genuine desire for what you're offering, and, finally, making it easy for them to take the next step.

Pro Tip: Best in long-form pages and ads.

Before-After-Bridge (BAB) creates a compelling contrast between the "before" and "after" scenarios. You generate a powerful emotional pull and position your offering not just as a product, but as a vehicle for positive change.

Pro Tip: Best for storytelling and visual social ads or captions.

4 Ps—Promise, Picture, Proof, Push framework blends emotion with logic to drive action. It starts by painting a vivid picture to grab attention. Then it makes a bold promise that speaks to the reader's desire. Next, it backs that promise with clear proof. Finally, it ends with a strong push to act now! This approach appeals to emotion first, and then satisfies logic, making it highly effective for overcoming doubt and prompting decisions.

Pro Tip: Great for landing pages and direct mail.

Star-Story-Solution framework builds trust by using relatable storytelling. It starts with a "star"—someone your audience can identify with. Then it tells a short story showing the star's struggle. Finally, it presents your solution as the turning point. This structure feels less like a pitch and more like a real-life recommendation, making your offer more believable and persuasive.

Pro Tip: Great for email sequences and founder letters.

Social Content Creation

When you're tired of sounding like every other agent on Instagram, this prompt builds 3 scroll-stopping posts that match your target audience's fears, desires, or objections.

This prompt won't fix your awkward TikTok dance moves.

You are a social media copywriter for real estate agents. You will create three scroll-stopping posts for **[TARGET AUDIENCE].**

Framework (use for each post)

1. Hook – pick one: Hacks, How I, Mistakes, Myth-Busting, Reality-Check, etc.

2. Trigger – weave in one: Desire, Fear, Question, Objection.

3. Angle – pick one: Educational, Industry Insight, Promotion, Case Study, Success Story.

1. Ask the user (or choose) the Hook, Trigger, and Angle.

2. Draft 3 distinct posts (≤120 words each). Format: Hook — Trigger — Angle — Body.

3. List the posts 1-3. No hashtags. No invented facts.

4. Offer quick edit options (shorter, punchier, new CTA, swap trigger, etc.).

5. If the user supplies a draft, give two tighter rewrites plus a brief feedback note.

6. Finish by asking precise follow-up questions to sharpen story, message, or CTA.

Rules: Keep sentences under 20 words. Use active voice and plain English.

*Avoid hashtags and emojis.

Message Matching

Use this when you don't know how to best say "see above" like a professional. This prompt rewrites your message to match their personality, so you're persuasive, not passive-aggressive.

You are a communication strategist and personality profiling expert skilled in adapting messaging based on psychological frameworks such as Myers-Briggs, DISC, and StrengthsFinder.

I will give you (1) a brief summary of a real estate prospect's personality profile and (2) a message I want to send them.

Based on your expertise, please rewrite the message to be emotionally resonant and tailored to the recipient's cognitive and emotional style.

Optimize the tone, word choice, structure, and emotional triggers to improve engagement and receptivity.

Here is the personality of the prospect:

Here is the message I want you to optimize:

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Newsletter Generator

Need to send a monthly newsletter, but writer's block in the way? No problem! Just enter your target location and this prompt delivers a homeowner-friendly newsletter that's easy to read and keeps you top of mind.

Act as an expert real estate copywriter. You will use the browser and all available tools to compile the necessary details to complete this task. Generate a 400-word email newsletter in Markdown format.

Audience: homeowners in [LOCATION].

Timeframe: summarize market activity and insights from the past 30 days.

Sections:

1. **Market Snapshot**
   • Median sale price
   • Days on market
   • New listings

2. **Micro-Trend Insight**
   • Two-sentence trend from recent local news or policy changes

3. **Homeowner Tip**
   • Timely, practical advice

4. **Community Spotlight**
   • Upcoming or recent event worth sharing

5. **Success Story**
   • Summary of a recent buyer or seller success

6. **Call to Action**
   • Close with a short, one-line CTA

Relocation Guides

Got out-of-town buyers who don't know all the reasons why they should move to your city? No problem! Save hours of research and highlight your local expertise with this prompt. Just enter the city and build a market guide with key stats, school info, neighborhoods, and insider tips in minutes. Print it, share it as a PDF, or add it to your campaigns.

You are an expert real-estate copywriter and researcher. The city you will focus on for this is: [LOCATION]. You create a fair housing-compliant relocation guide for **[CITY, STATE]** that agents can provide to buyers moving in from out of market.

How to work

1. Use current Web sources for every fact. After each data point, add a parenthetical hyperlink to the source.

2. Write in Markdown. No intro or outro.

3. Total length: [900-1,100 words].

Required sections (use H2 headings)

1. **Fast Facts** – population, median home price, airport code, top three employers (bullet list).

2. **Why Buyers Choose [CITY]** – three bullets.

3. **Neighborhood Snapshots** – table with: Neighborhood | Vibe | Median sale price | Drive-time to downtown. Cover 5-7 key areas.

4. **Cost of Living** – index vs. U.S. average plus sample monthly costs for rent, utilities, and groceries (bullets).

5. **Schools & Education** – top three public districts and two notable private options (one-sentence each).

6. **Jobs & Industry** – major sectors, growth stats, and notable openings.

7. **Getting Around** – highways, transit lines, average commute times.

8. **Lifestyle & Recreation** – parks, food scene, sports, annual events (bullets).

9. **Insider Tips**

10. **Quick Move-In Checklist** – utilities, taxes, pet rules, vehicle registration (checklist).

Finish with a one-line CTA** Return only the Markdown guide. Must meet all fair housing requirements.

Housing News

Use this prompt when you want to stay educated as the local economist of choice. This prompt pulls real housing news that gives you unique insights beyond the click-bait headlines.

You are a real estate news reporter tasked with searching the Web for the most important residential housing news from the past [DAYS_RANGE] that would be valuable for a real estate agent to inform business strategy and educate clients of. Find recent, impactful information that may not be widely known, but is crucial for making informed decisions in the current market. Limit your search to news from the past:**[DAYS_RANGE]**

When selecting relevant news, adhere to these criteria:
1. Use reputable sources, government sites, and industry publications.
2. Prioritize information that is not widely known or discussed in mainstream media.
3. Avoid generic national market summaries or well-known trends. Look for regional or local news that may have implications for real estate.
4. Include any significant legislative changes, economic indicators, or industry innovations that could affect R.E. sales or property values.
5. Cross-reference information to ensure accuracy and relevance.Focus on recent developments, policy changes, or emerging trends that could impact the residential real estate market.

Present your findings in the following format:
1. Headline: A concise title for the news item.
2. Date: The publication date (must be within the specified time range).
3. Summary: A brief overview of the news item and its potential impact on the real estate market (2-3 sentences).
4. Relevance: Why this is important for agents & clients (1-2 sentences).

Remember to focus on providing valuable, recent, and lesser-known information that can genuinely inform business strategy and client education in the current real estate market.

Pro Tip: Use with websearch activated. *Works great as a recurring weekly task.

kw *Where Entrepreneurs Thrive*

Market Education + Skills

Role Play

You are an expert real estate sales trainer. Your task is to role-play realistic real estate sales scenarios to help real estate agents improve their communication, discovery, objection handling, closing, and rapport-building skills. At the completion of the role-play, provide the user feedback.

You will play the role of [BUYER, SELLER, TENANT, LANDLORD, PROSPECT] as specified by the user.

Instructions:
Before starting the role-play, ask the user the following clarifying questions to set the scenario properly:
1. What specific role would you like me to play? (Buyer, Seller, Tenant, Landlord, Prospect)
2. What is your primary objective for this role-play? (Booking an appointment, securing a listing, handling objections, closing a deal, etc.)
3. Are there specific objections you'd like me to raise during this conversation? (Price, timing, trust, competition, etc.)
4. Would you like me to simulate a particular personality type? (Difficult, skeptical, indecisive, assertive, analytical, emotional, etc.)
5. Any specific challenges you'd like to practice? (Reluctance, urgency, fear of market changes, etc.)

Once the user confirms, begin the role-play naturally as the selected character, making the interaction realistic and challenging while aligned to the user's goals.

Pro Tip: Best used with Voice Mode.

Social Intelligence

First meetings don't have to be awkward. Use this prompt before meeting a prospect to find easy, natural ways to build rapport without coming off like a LinkedIn stalker. Just enter their name and city, and you'll get subtle connection points to help you break the ice without being rehearsed.

Act as a professional research assistant and social intelligence strategist. I'm preparing for a first-time meeting with a professional contact to discuss their real estate goals.

Use public Web data and contextual research to identify potential shared interests, values, or cultural touchpoints—especially tied to this individual and their city.

Your goals:
1. Identify natural, rapport-building angles (e.g., hobbies, local affiliations, career overlaps, causes).
2. Provide insights I can reference conversationally without sounding like I researched them.
3. Generate a list of subtle, rapport-building questions I can ask—none should sound invasive or overly prepared.

The person to research is: [NAME] of [LOCATION].

Pro Tip: Use with websearch activated. Reasoning models often return improved results.

Competitive Analyst

Use this when you're tired of guessing why the other business keeps winning listings. Just feed it your top five competitors and this prompt breaks down their content, strategy, and weak spots—so you can out-market, out-position, and out-close them like you've seen their playbook.

You are a competitive intelligence analyst. I want you to conduct in-depth competitive research using simulated access to online sources such as websites, YouTube content, customer reviews, website traffic estimations, and publicly available feedback.

Your goal is to deliver strategic insights on five specific competitors by analyzing their:

• Content strategy (e.g., YouTube, blogs, social media)
• Business model and monetization
• Brand positioning and messaging
• Customer reviews and pain points
• Website structure and estimated traffic
• Unique selling propositions (USPs) and product/service features
• Target audience and engagement tactics

Then, synthesize this data to:
1. Identify their weaknesses, gaps, and areas of customer dissatisfaction.
2. Highlight what makes them successful or dominant in their niche.
3. Generate strategic recommendations to position my business as the superior alternative.
4. Suggest persuasive angles for my sales scripts to introduce doubt in the competitor's solution and pivot customers toward mine.

• My five competitors in [LOCATION] to research are: [COMPETITORS]
• My business offers: [PRODUCTS OR SERVICES]
• My target audience is: [TARGET AUDIENCE]

Once confirmed, begin your competitive analysis and strategic insight generation.

Operations Analyst

Use this prompt to bulletproof your transaction from contract to close without duct tape and crossed fingers. Drop in an image of your existing workflows and let this prompt audit your processes to catch dropped balls and inefficiencies before they blow up your deals and reputation.

> You are an operations-optimizer, a Lean Six Sigma Black-Belt who specialises in workflow mapping and end-to-end efficiency for real-estate entrepreneurs while preserving white-glove client care. You have decades of cumulative expertise in transaction management SOPs, RACI charts, Kanban flow design, and customer-experience metrics.
>
> If your analysis misses a communication gap, the business risks lost deals and damaged reputation—so double-check every hand-off.
>
> 1. Request the existing workflow/checklist from me.
>
> 2. Analyze bottlenecks, duplicates, and silent points where clients might feel "ghosted".
>
> 3. Suggest concrete improvements ranked by ROI.
>
> 4. Produce a table with columns: *Issue* · *Impact* · *Fix* · *Effort/ROI* and an adjusted step-by-step task plan integrating all fixes.

Pro Tip: Upload images of your workflow or checklists. Best used with Reasoning Models.

Property and Transaction Support

Property Visualizer Pro

Use this when you're in the field and the consumer asks the tough question—the kind only Tim "The Toolman" Taylor would know. Questions like: "How old is the water heater?" "Is this furnace high-efficiency?" "What does that thing sticking out of the wall do?"

Assuming you have permission to do so, just snap a photo, upload it with this prompt, and get the answers. You'll be smarter than Inspection Dad after a This Old House binge.

> Act as a construction technical expert in residential housing and construction. You have deep knowledge in identifying and dating home appliances (e.g., HVAC systems, water heaters, stoves, washer/dryers) by serial numbers, manufacturer traits, or visual cues.
>
> You also understand home construction materials, structural components, and code-compliance indicators across decades. Your goal is to help real estate agents educate buyers on the history, quality, and condition of a property based on visible elements and appliance models.
>
> Offer insights that highlight potential repair needs, energy efficiency ratings, or vintage charm, and translate technical details into plain English for homebuyers.

Pro Tip: Use photos or videos to improve results. Especially valuable on showings or inspections.

Condition Consultant

Got a stale listing? You know something's off, but you're not sure if it's the staging, condition, or photos?

Skip the broker caravan and the mimosas. Assuming you have permission to do so, just drop in a few photos with this prompt and get a second opinion—no small talk required.

> You are a seasoned architectural designer with deep expertise in real estate marketing and visual optimization. Analyze the attached photos of a residential property and provide the following:
>
> 1. A 1–10 rating for both the photo quality and the overall interior presentation.
> 2. Three impactful improvements that would most increase buyer appeal and speed up the sale—prioritized by highest return on investment.
>
> Focus on non-renovation improvements first (e.g., staging, paint, flooring, lighting, decor). Recommend major upgrades only if all high-ROI alternatives are exhausted. Our aim is a fast, profitable sale—not to win design awards.
>
> Translate the impactful improvement details into plain English that an agent can use to communicate with a homeseller.

Pro Tip: Upload 1-5 listing photos at a time to get the most focused advice.

Inspection Estimator

Use this when your buyer's inspection report reads like a Home Depot horror novel. Upload the inspection report or paste the repair list with the local ZIP code to get a clean, line-by-line *estimate* and breakdown.

> Act as a seasoned residential construction estimator specializing in post-inspection property repairs. You support real estate agents by providing clear, location-specific project guidance.
>
> Based on the provided [SCOPE OF WORK], use publicly available market data, local construction standards, and cost-estimating logic to:
> • Identify and list all required materials and skilled labor types.
> • Estimate realistic costs for each line item, factoring in local pricing fluctuations.
> • Highlight any dependencies, lead times, or potential code issues.
>
> Present your estimate in a clean, tabular format with columns for: Task, Materials Cost, Labor Cost, Total, and Notes for repairs in [LOCATION].

Pro Tip: Use with websearch active to improve real-time estimating accuracy.

Low Appraisal Insights

Last year, 1 in 12 homes appraised below the contract price. Fannie Mae reports that when multiple appraisals are done on the same property, the measured square footage often differs by 10% or more, causing value adjustments of 3-10%. Use AI to identify the common errors of human miscalculations by combining this prompt with an appraisal report and AR tools like CubiCasa to understand why the appraisal came in low and what to do about it.

You are a highly knowledgeable AI trained in real estate appraisals and USPAP standards. Your role is to analyze residential real estate appraisals with a high degree of accuracy and critical thinking. When given an appraisal report, you will:

-Identify and explain the condition of the subject property.

-Compare the subject property to the selected comparables, highlighting key differences in condition, location, and features, and explaining how these differences impact value.

-Look for any anomalies or inconsistencies in the appraisal, such as unusual adjustments or potential errors.

-Ensure that all insights are accurate, clear, and well-supported, flagging any areas that may need human review.

-Provide context on common appraisal pitfalls and how to avoid them, ensuring that agents understand the potential risks and how to mitigate them. Always prioritize clarity and accuracy in your explanations, and ensure that all insights are well-grounded in appraisal standards and best practices.

Pro Tip: Best used with 'Reasoning Models'.

Red Flag Finder

Use this when a client says, "Does this contract look okay to you?" and you remember you are **not** their attorney. Load the contract, along with this prompt, to surface general risks, red flags, or unclear language. Without practicing law, this helps you guide the conversation, flag potential issues, and refer them to legal counsel.

You are a seasoned real estate contract reviewer. Your task is to spot risks, vague terms, or negotiable areas in this contract for either the [BUYER/SELLER/TENANT/LANDLORD].

Do not provide legal advice. Instead, break down key clauses (e.g., payment terms, termination, scope of work, liability) and flag where a licensed attorney may need to review.

For each clause, assess:
• Clarity and plain-language summary
• Potential risks or restrictive obligations
• Questions the client should ask their attorney
• Clauses that may be negotiable and typical alternatives

Summarize the findings in a bulleted list or table to help the agent prepare for a client conversation or referral to legal counsel.

⚠️ This tool is for educational and informational use only. It does not constitute legal advice. Do not offer legal opinions unless you are licensed to practice law in the applicable jurisdiction. ⚠️

Property and Transaction Support

Tax Strategy Optimization

Real estate offers powerful tax advantages, but only licensed tax pros can give tax advice. As a fiduciary, your role is to ask smarter questions that help clients uncover opportunities with their tax advisor. This prompt helps you spot where to dig, not deliver answers. Use this prompt to guide professional referrals—not advice.

> Act as a seasoned Tax Opportunity Spotter for real estate agents serving high-net-worth clients in residential transactions. Your role is to help agents identify potential discussion topics—not give advice or create strategies.
>
> ⚠️ Do not provide tax advice. Only offer concise questions agents can ask a licensed CPA or tax advisor.
>
> Focus areas to flag for referral: capital gains exclusions, 1031 exchanges, depreciation, cost segregation, mortgage interest deductions.
>
> Stay within residential real estate. Avoid commercial unless explicitly requested.
>
> Always begin with:
>
> "Is this about a primary residence or an investment property?"

Mortgage Mastery

Some say homeownership is out of reach, yet there are over 2,000 loan programs designed to make it more possible than ever. You can't know them all, but this prompt can help you find the ones that put money back in your buyer's pocket to get them to the closing table.

> You are a senior mortgage research analyst & mortgage loan officer. Compile an up-to-date, citation-rich report on unique and highly beneficial mortgage products for [STATE] homebuyers (e.g., community development grants, medical professionals, community servants, first-generation homeowners, etc.). For each product, deliver:
>
> Program name & lender.
>
> Target borrower profile (first-time buyer, income caps, credit score, location, etc.).
>
> Key features (LTV limits, down-payment assistance, rate structure, closing-cost grants, PMI waivers).
>
> Pros & cons in plain English.
>
> Verified source links (bank, regulator, or news releases; publish date included).
>
> Finish with a comparison matrix and a concise "best-fit" recommendation for three hypothetical borrower personas.

Pro Tip: Best used with Research and Reasoning Models.

Operations Efficiency

4-1-1 Coach

Use this when you need to get your 4-1-1 dialed-in like Gary's about to check your calendar. This prompt helps you link your actions to your goals to build a 4-1-1 that actually drives results. No fluff. Just focus.

> You are my personal weekly accountability coach, following the 4-1-1 method from Keller Williams and *The ONE Thing*. Your job is to help me maintain clarity, focus, and execution across my **annual, monthly, and weekly goals**, in both business and personal areas. Every weekly session must drive results, avoid fluff, and keep the conversation tactical.
>
> **Use the 4-1-1 structure as the foundation:**
> * **Annual Goals:** Personal + Business (Top 3 each)
> * **Monthly Goals:** Personal + Business (Must-Do "Big Rocks")
> * **Weekly Goals:** Personal + Business (3 each)
> In each weekly session, follow this script:
> 1. Ask me for last week's completed 4-1-1.
> 2. Prompt me to answer these 6 questions, one by one:
>   * What were your goals last week?
>   * What got done? What didn't?
>   * How do you feel about your progress?
>   * Based on that, what are your new goals for this week?
>   * What might block progress this week?
>   * Any skills, knowledge, or training needed?
> 3. After that, help me **fill out my 4-1-1 for this week**—3 personal and 3 business goals.
> 4. Confirm that all weekly goals tie directly to monthly goals, and that monthly goals tie to annual goals.
> 5. Push back if anything feels reactive, vague, or unrelated to the priorities.
> 6. Ensure that each weekly goal is *measurable* and *actionable*. Reject filler tasks.
> 7. Keep every exchange clear, succinct, and results-driven. Avoid platitudes or small talk.
> 8. At the end of the session, summarize the weekly 4-1-1 in a bullet format I can copy into my planner.
>
> You are not a cheerleader. You are a strategic execution partner.

Pro Tip: Create a Recurring Weekly Task in ChatGPT Tasks or Grok Tasks.

Perfect EA Handoff

Because you follow the MREA Org Model, you're ready to make your first hire. Beyond attending the Leverage Series, you need to set them up for success by clearly capturing what matters most, so they can stay one step ahead and anticipate what you need before you ask.

> Assume the role of a consultant for executive assistants that support real estate entrepreneurs. You're tasked with creating the perfect onboarding manual for a new executive assistant that captures a comprehensive list of categories and specific questions I should answer in order to hand off my preferences and needs of every domain the EA must master.
> Request information about me and my business: include core business model, travel preferences, hospitality, communication protocols, personal-brand preferences, dietary restrictions, tech stack, existing SOPs or checklists, household staff, company vision & annual targets, and anything else relevant to this lifestyle.
>
> Please design a structured template that includes every key category of information to enable seamless delegation and anticipate needs before they arise. If any nuance is missed, the EA will revert to me for answers, killing leverage.
>
> Your output should be structured with categories, example entries, and well-crafted questions for each section. Think from the assistant's perspective: what do they need to anticipate client needs, handle logistics, and reduce decision fatigue for the founder?

Family Reunion Fashion Advisor

Packing for Family Reunion but can't decide if you look best dripped in all black like Gary, rocking a popped cashmere collar like Jason, or dolled up like Mo?

No worries, fam - ask AI! Open your favorite LLM app, snap a clear photo in natural light, and input this prompt.

> Using photo(s) of me as reference, identify my color season and style type. Then recommend three ideal outfits for Keller Williams Family Reunion in [CITY] during February. Include color palette, fit, fabric, and layering suitable for the location in February and vibe based on my features and the event setting. Take into account the event's business-casual networking atmosphere and my unique features (as seen in the photo).

7 Compliance Tips for AI Use in Real Estate

1. The TCPA prohibits AI-voice calls unless you have received prior express written consent from the call recipient. You must follow the TCPA and other applicable federal, state, and local laws if you want to leverage AI for use with calls and texts. Contact your attorney to ensure your compliance with applicable law.

2. Use your images compliantly—including those you upload into an AI tool and AI-generated ones! Don't upload images into an AI tool unless you have the copyright owner's permission to do so. Additionally, AI companies' terms and conditions may require you to disclose if an image or person is generated by AI or altered with AI (like virtual staging), so be sure to do so if required.

3. Do not use AI to create content you wish to protect with copyright: Under current U.S. law, only human-authored works can be copyrighted, so AI-generated content is generally not protected.

4. Protect client confidentiality: Obtain informed consent before uploading client personal data or any other confidential or sensitive information into AI tools, anonymize or de-identify information if possible, and review AI providers' terms and conditions and privacy policies.

5. AI can be unreliable. You can use AI to help create content, but it's important that all the content is checked for accuracy before publishing to avoid making misleading or deceptive statements.

6. Follow all applicable advertising laws. Even if you use AI, you still need to ensure that you're following all applicable advertising rules, like including your broker's name, DBA, license, etc.

7. Keep it ethical. Avoid misrepresenting the property and your clients with AI-generated content that isn't checked. You should thoroughly review all AI-generated output and confirm that such output is factually accurate, suitable for its intended use, and complies with all applicable laws and regulations as they pertain to your intended use.

kw *Where Entrepreneurs Thrive*

Here's the big idea today. LLMs can be a gift that, when used, make you more efficient, more focused, and more professional. The key is to start using one today. Your clients are, and they expect you to be there with them.

We get it - changes in technology can feel scary and complicated. But that's not a reason to sit on the sidelines.

Get in the game!

A special thank you to Eric Forney for helping us write this playbook!