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CHANGE YOUR REAL ESTATE BUSINESS OVERNIGHT WITH AI

Participant Workbook & Prompt Guide

Practical AI workflows for agents, brokers and brokerage staff

Facilitator	Format	Participant outcome
Denny Andrews | C2 Financial Corporation	Two-hour practical workshop	One reusable workflow ready within 24 hours

The workshop promise

AI can change how quickly you prepare, communicate, organize and follow up. It does not guarantee overnight income, replace professional judgment or remove your responsibility for the final work.

What you will be able to do

- Recognize what generative AI does well, where it fails and when human judgment is essential.
- Use a seven-part prompt framework to produce clearer, more useful and more professional work.
- Turn rough notes into client emails, texts, talking points and follow-up plans.
- Create and repurpose useful property, transaction, marketing and educational content.
- Verify facts, calculations, sources, tone, confidentiality and fair-housing compliance before sharing.
- Leave with one saved prompt and a 24-hour implementation plan.

Two-hour workshop map

Time	Module
0:00-0:15	The overnight challenge and why AI changes business speed
0:15-0:30	The seven-part prompt framework
0:30-1:00	Live demos: client communication and professional property reports
1:00-1:05	Micro-break and audience prompt collection
1:05-1:35	Marketing/follow-up demo and participant prompt lab
1:35-1:50	Responsible AI for real estate
1:50-2:00	24-hour action plan, questions and close

Opening reflection

What repetitive task do you wish took 15 minutes instead of two hours?

1. AI as a Business Multiplier

The central idea
AI does not replace your experience, relationships or accountability. It multiplies how quickly you can apply them.

What generative AI is good at

- **Drafting:** emails, texts, scripts, articles, FAQs, listing content and outlines.
- **Transforming:** one set of facts into several formats for different audiences.
- **Structuring:** turning scattered notes into a checklist, timeline, report or action plan.
- **Summarizing:** extracting key decisions, risks and next steps from information you provide.
- **Comparing:** organizing options, scenarios and tradeoffs when the underlying facts are reliable.
- **Brainstorming:** creating alternatives, questions and angles you can refine with your expertise.

Where it fails

- **Confident errors:** it may invent facts, citations, laws, property details or explanations.
- **Missing context:** it cannot know the facts you did not provide and may fill gaps incorrectly.
- **Stale information:** rates, listings, forms, rules and market conditions change.
- **Weak judgment:** it cannot replace the local, ethical and relational judgment of a licensee.
- **Generic voice:** without examples and refinement, the output may sound impersonal or promotional.

The professional workflow

1. **Define the decision.** Who is the reader, what do they need to understand and what action should follow?
2. **Gather trusted inputs.** Use accurate notes, documents, current sources and separately verified calculations.
3. **Protect the data.** Redact unnecessary names, account numbers, financial records, access codes and personal identifiers.
4. **Direct the AI.** Specify the role, goal, context, inputs, constraints, output and verification standard.
5. **Refine deliberately.** Ask for missing facts, alternatives, shorter language, your voice and unsupported-claim flags.
6. **Verify independently.** Check every material property, transaction, financial, legal and market statement.
7. **Own the final product.** Edit, approve and communicate it as the responsible professional.

A useful mindset

Instead of asking...	Ask...
Can AI do my job?	Which part of this task can AI accelerate while I retain judgment?
Can I trust this answer?	Which claims, numbers and sources must I independently verify?
What is the perfect prompt?	What context, constraints and refinement will improve this result?
How do I sound impressive?	How do I make this genuinely clearer and more useful to the client?

2. The Seven-Part Professional Prompt

#	Component	Question	Real estate example
1	Role	Who should the AI act like?	Experienced listing agent and client-communication editor
2	Goal	What result is needed?	Draft an email explaining an appraisal shortfall
3	Context	What situation and audience matter?	First-time buyers; closing is scheduled in 12 days
4	Inputs	What facts may it use?	Appraised value, contract price, dates and available options
5	Constraints	What must it do or avoid?	Warm; factual; no promises or legal advice; under 250 words
6	Output	What exact form should it take?	Subject line, short sections and immediate next steps
7	Verification	How should uncertainty be handled?	Flag missing facts and statements requiring confirmation

Weak prompt

Example
Write an email about a low appraisal.

Professional prompt

Example
Act as an experienced real estate agent and client-communication editor. Draft a calm email to first-time buyers explaining that the appraisal came in below the contract price. Use only the facts I provide. Explain the issue in plain language, organize the available options without recommending legal action, and end with three immediate next steps. Keep it under 250 words and retain a warm, confident tone. Before drafting, list any missing information you need. After drafting, flag every statement that I should verify with the lender, broker or transaction documents.

Refinement prompts that improve almost any result

- Before answering, ask me up to five questions about information that is missing or unclear.
- Use only the facts I supplied. Mark any assumption as [ASSUMPTION].
- Identify every statement that requires independent verification before publication or delivery.
- Make this warmer and clearer without making it sound promotional or changing my meaning.
- Shorten this by 30% while preserving the facts, tone, next steps and important cautions.
- Create three alternatives: concise, conversational and highly polished.
- Critique the draft for accuracy, ambiguity, fair-housing risk, promises and unsupported claims.
- Rewrite it in my voice using the sample communications I provide as the style reference.

Prompt Chaining & Reusable Prompt Worksheet

For substantial work, do not demand the final product in one step. Use a short sequence:

- Analyze the facts and identify the decision.
- List missing information and verification needs.
- Create the first draft or outline.
- Critique it against the objective and constraints.
- Revise and produce the final human-reviewed version.

My reusable prompt

My verification instructions

3. Real Estate Prompt Starter Pack

Replace every bracketed field. Use anonymized or broker-approved information, and tell the AI to identify missing facts before drafting.

Client communication - difficult transaction update

Act as an experienced real estate agent and client-communication editor. Using only these facts: [PASTE ANONYMIZED FACTS], create (1) a calm client email under 250 words, (2) a text message under 500 characters, (3) an agent-to-agent update and (4) a phone-call outline. Explain what is known, what remains uncertain and the next three actions. Do not give legal advice or make promises. Ask for missing information first, then flag every claim I must verify.

Listing content - accurate and distinctive

Act as a real estate copy editor. Using only this verified property fact sheet: [FACTS], draft a listing description in my voice. Emphasize specific property features and practical benefits without describing the preferred type of buyer, neighborhood demographics, protected classes, safety or school quality. Do not invent upgrades, views, distances or lifestyle claims. Provide a 700-character version, a 250-character version and a list of facts requiring MLS/broker confirmation.

Buyer property analysis

Act as a buyer-oriented real estate research analyst. Analyze [PROPERTY ADDRESS] for [BUYER OBJECTIVE]. Use current, attributable sources and distinguish verified facts from estimates. Organize the result into property snapshot, market position, comparable-sale screen, condition/document risks, offer considerations and due-diligence checklist. Do not call the result an appraisal. Cite each current factual source and identify every item requiring MLS, title, inspection, appraisal, county or lender confirmation.

Open-house lead follow-up

Act as a relationship-focused real estate follow-up strategist. Based on this anonymized lead context: [CONTEXT], create a 30-day follow-up plan that is helpful rather than repetitive or pushy. Include the purpose, timing, channel and short draft for each touch. Do not infer protected characteristics, financial capacity or motivation not stated in the inputs. Include a clear opt-out and flag any claim that depends on current market or property data.

One topic into five useful assets

Act as a real estate educator and content strategist. From this verified source material: [SOURCE], create a helpful 600-word article, a 150-word email, three social posts, a 60-second video outline and five client FAQs. Keep the content educational, specific and consistent across formats. Avoid hype, guarantees and unsupported market claims. Preserve citations and list any statement requiring a current-data check.

Past-client and referral-partner outreach

Act as a relationship-marketing editor. Draft a brief personal follow-up to [PAST CLIENT OR REFERRAL PARTNER] using these verified shared-history notes: [NOTES]. Reference the prior transaction naturally, offer one genuinely useful reason to reconnect and avoid a hard sales pitch. Create email, text and voicemail versions. Do not include confidential details that the recipient would not expect to see repeated.

Transaction checklist from documents

Act as a transaction-organization assistant. From the broker-approved, redacted documents or notes I provide, extract dates, obligations, open questions, dependencies and responsible parties. Produce a chronological checklist. Quote the source location for each item and mark ambiguous language for broker or legal review. Do not modify forms, create contract language or infer deadlines that are not stated.

4. The C2 Report Workflow

Why these reports matter

Professional AI-assisted reports have improved client understanding, strengthened agent confidence and demonstrated measurable business impact. The value is not the appearance alone - it is faster understanding, better decisions and clearer follow-through.

Stage	Professional standard
1. Reader & decision	Identify who will use the report and what decision it must support.
2. Trusted inputs	Collect current listing/MLS facts, public records, market data, financing assumptions and transaction documents.
3. Separate calculations	Compute payment, cash requirement, LTV, DSCR, cap rate or scenarios independently; show assumptions.
4. Current research	Use authoritative, attributable sources; record data dates and distinguish facts from estimates.
5. Clear structure	Lead with the conclusion, then show evidence, risks, options and next actions.
6. Professional format	Use consistent C2 branding, black text, readable tables, citations and a clear disclaimer.
7. Human verification	Confirm every material number and claim before sharing; retain broker/lender/appraiser/title/inspection boundaries.
8. Repurpose	Turn the report into an executive summary, buyer email, agent talking points and follow-up message.

Information hierarchy for a property or financing report

- Bottom-line conclusion: what the evidence supports and what it does not.
- Key facts: price, status, size, condition, taxes, HOA, loan structure or rate assumptions.
- Decision evidence: comparable sales, rental support, payment scenarios or market context.
- Material risks: condition, title, permits, appraisal, financing, occupancy, fair housing and data conflicts.
- Action framework: offer range, document requests, contingency priorities or financing next steps.
- Sources and limitations: attributable links, data cutoff and clear professional boundaries.

Report verification worksheet

Review area	Confirmation source	Complete
Property facts	MLS, county record, listing agent or transaction documents	
Comparable sales	MLS/appraiser-grade data; condition and concessions reviewed	
Rates and payments	Current lender quote or authoritative benchmark; math recalculated	
Taxes / HOA / insurance	Current statement, resale certificate, quote or verified source	
Legal / permits / zoning	County/city, title, broker or qualified professional	
Tone and disclosure	Client appropriate; no promises; limitations stated	

Report Opportunity Worksheet

Which client decision or transaction problem would the report support?

Which verified inputs and current sources would it require?

Which calculations, claims and professional boundaries require human review?

How could the completed report be repurposed for follow-up?

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5. Responsible AI for Real Estate

The memorable rule
If you would not place the information in an ordinary business email, do not paste it into an unapproved AI tool.

Confidentiality and data handling

- Use broker-approved tools, accounts and workflows.
- Redact client names, account numbers, financial records, access credentials, identification documents and unnecessary transaction details.
- Understand the privacy and data controls of the actual account or workspace being used.

Fair housing

- Never ask AI to steer, rank, exclude, target or describe people or neighborhoods using protected characteristics.
- Review listing language, lead targeting, property recommendations and neighborhood descriptions for discriminatory or coded language.
- Comply with federal, state, local, MLS and brokerage requirements; protections may extend beyond the federal categories.

Accuracy and professional boundaries

- Verify property facts, laws, forms, rates, calculations, citations and market claims against authoritative sources.
- Do not use AI to draft or modify contracts, standard forms or legal advice without the required broker/legal process.
- Label estimates and scenarios clearly; never present AI-generated research as an appraisal, inspection, title opinion or loan commitment.

Images, marketing and intellectual property

- Do not misleadingly alter property condition, features, views, reviews or testimonials.
- Disclose virtual staging or material image enhancement when required by rules, law, policy or good practice.
- Confirm rights and permissions for photos, floor plans, logos, copy and uploaded materials.

Responsible AI Pre-Send Review

Check	Before I send, publish or rely on the output...
Data	I used an approved system and removed unnecessary confidential information.
Facts	I verified every material property, transaction, financial and market statement.
Fair housing	The content does not steer, exclude, rank or target based on protected characteristics.
Promises	The content does not guarantee results, timing, value, financing, safety or legal outcomes.
Images / rights	Visuals are not misleading and I have permission to use the materials.
Voice / usefulness	The message sounds like me, is genuinely helpful and tells the reader what happens next.

Check	Before I send, publish or rely on the output...
Approval	I completed the broker, lender, legal, MLS or professional review required for this use.

When to stop and ask a professional

- The answer depends on interpreting a contract, law, disclosure duty, protected class, advertising rule or licensing requirement.
- The data conflicts, the cited source cannot be located, or the AI sounds certain without evidence.
- The content could materially affect a client decision, financing, offer, deadline, property condition representation or legal right.
- You are unsure whether the tool or workspace is approved for the information you plan to upload.

Scenario or policy notes

6. Participant Prompt Lab

Choose one recurring real estate task. Complete the framework before opening the AI tool.

Component	Planning question	My instruction
Role	Who should the AI act like?	
Goal	What exact result do I need?	
Context	Who is the audience and what situation matters?	
Inputs	Which verified facts, notes or sources may it use?	
Constraints	What must it do, avoid, preserve or limit?	
Output	What format, length, tone and sections do I want?	
Verification	What should it flag, cite or ask me to confirm?	

Pair-review questions

- Is the desired result specific enough to recognize when it is correct?
- What context or facts are missing?
- What could the AI assume incorrectly?
- Are the audience, tone, length and output format clear?
- Which statements or calculations require independent verification?
- Does the prompt adequately protect confidential information and fair-housing responsibilities?

My revised prompt

Output Review Worksheet

Review question	My finding or correction
Which statements are unsupported, unclear or overly certain?	
Which property, market, financial or legal facts did I verify?	
Did the output protect confidential information and fair-housing obligations?	
Does the final version sound like me and give the reader a useful next step?	

Final edits and lessons

7. My 24-Hour AI Action Plan

Success standard
Before the next workday ends, use one saved prompt on one real, broker-approved business task and verify the result before sharing it.

Action item	My plan	Complete
Task I will improve		
Who benefits		
Current time required		
Target time required		
Prompt I will save		
Information I need		
Data I must redact		
Verification source		
First use deadline		
Result I will measure		

Seven-day follow-up

- How many times did I use the workflow?
- How much time did it save?
- What improved in clarity, professionalism, consistency or response?
- What mistakes or weak spots did I find during verification?
- What will I change before making the workflow repeatable?

Notes and results

8. Brokerage Next Steps & References

Potential next steps for a brokerage or team:

- Create approved prompt templates for common communications and reports.
- Define approved tools, privacy settings, redaction rules and review requirements.
- Build a shared verification checklist and source standard.
- Run a 30-day challenge: one workflow per week followed by a results roundtable.
- Identify repeatable workflows suitable for brokerage-wide training and quality control.

Current references and further reading

National Association of REALTORS® - Artificial Intelligence in Real Estate: https://www.nar.realtor/artificial-intelligence-real-estate
NAR - Using AI in Your Real Estate Business? 3 Traps to Avoid: https://www.nar.realtor/news/real-estate-news/law-and-ethics/using-ai-in-your-real-estate-business-3-traps-to-avoid
NAR - Hot Topics in Broker Risk Reduction: https://www.nar.realtor/legal/hot-topics-for-brokers
HUD - Fair Housing Act Overview: https://www.hud.gov/helping-americans/fair-housing-act-overview
FTC - Artificial Intelligence: https://www.ftc.gov/industry/technology/artificial-intelligence
OpenAI - Enterprise Privacy: https://openai.com/enterprise-privacy/

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