

REAL ESTATE PROFESSIONAL DEVELOPMENT SERIES

CHANGE YOUR REAL ESTATE BUSINESS OVERNIGHT WITH AI

Three consecutive one-hour practical trainings for real estate professionals

FORMAT
3 x 60 minutes

AUDIENCE
Agents, brokers and staff

FACILITATOR
Denny Andrews

A practical progression from better prompts, to better client work, to a repeatable and responsible AI operating system.

The promise: Every participant will leave each hour with one completed business asset that can be used, refined and measured immediately. The title promises operational change - not guaranteed income.

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C2 Financial Corporation | August 2026

INSTRUCTOR MASTER GUIDE

THREE-HOUR COURSE MAP

Three consecutive classes that move from understanding to application to implementation

Training	Business question	What participants learn	Finished asset
1. Prompt With Purpose	How do I get professional work instead of generic answers?	AI mental model, seven-part prompt framework, refinement and verification.	One reusable, verified prompt for a recurring communication task.
2. Build the Client Experience	How do I turn one set of facts into useful client-facing work?	Source-to-assets workflow for reports, updates, marketing and follow-up.	Three coordinated assets created from one approved source item.
3. Build the Business System	How do I make AI use safe, repeatable and measurable?	Risk controls, workflow selection, SOPs, playbook habits and a 30-day rollout.	One documented AI workflow plus a 30-day implementation scorecard.

SERIES OUTCOMES

- Explain what generative AI does well, where it fails and why human judgment remains essential.
- Use Role + Goal + Context + Inputs + Constraints + Output + Verification to create better instructions.
- Convert approved source material into client emails, property summaries, transaction updates, marketing and follow-up.
- Apply confidentiality, fair-housing, accuracy, image-integrity, copyright and human-review safeguards.
- Document one repeatable workflow and track whether it actually saves time or improves client service.

Delivery choice: Teach the three hours back-to-back with a 10-minute break between classes, or schedule the classes separately. The instructional time in each class is exactly 60 minutes. Back-to-back classes use the prior class lab output for each check-in; separately scheduled classes use the field assignment. Complete any remaining assignment after the full program.

FACILITATOR PREPARATION

PREPARE THE ROOM, EXAMPLES AND GUARDRAILS

The training should feel practical, credible, safe and immediately useful

REQUIRED DEMONSTRATION ASSETS

- ☐ One completed C2 purchase, offer or financing report with confidential details removed.
- ☐ One deliberately messy set of transaction notes for the communication demonstration.
- ☐ One accurate, nonconfidential listing fact sheet or public listing sample.
- ☐ One anonymized lead profile and follow-up history for the multi-channel exercise.
- ☐ One side-by-side example: vague prompt, structured prompt, first draft and human-reviewed final.
- ☐ Offline screenshots or completed examples in case live AI or internet access is unavailable.

FACILITATOR READINESS

- ☐ Obtain broker approval for the tools, examples, data-handling rules and any recording.
- ☐ Redact client names, financial records, property-access details, account numbers and credentials.
- ☐ Verify every current statistic, rate, property fact, policy statement and legal reference on the day of delivery.
- ☐ Use a clean demonstration account and silence notifications before sharing the screen.
- ☐ Prepare printed or digital copies of the prompt framework, safety checklist and 30-day scorecard.
- ☐ Ask participants to bring one repetitive task and one approved, nonconfidential source item.

Instructor standard: Never demonstrate speed at the expense of accuracy. Show the raw inputs, the first AI draft, the verification step and the final human decision so participants see the complete professional workflow.

TRAINING 1 OF 3 | 60 MINUTES

PROMPT WITH PURPOSE

From a blank screen to a professional, verified first draft

PRIMARY SKILL Structured prompting	HANDS-ON RESULT Reusable prompt	COURSE OUTCOME A communication prompt ready for immediate use
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LEARNING OBJECTIVES

- Describe AI as a drafting, summarizing, comparing, structuring and brainstorming assistant - not an independent source of truth.
- Build a complete prompt with the seven-part framework.
- Use prompt chaining to analyze, ask questions, draft, critique and finalize.
- Review an output for missing facts, unsupported claims, tone and next actions.

EXACTLY 60 MINUTES

Time	Min.	Segment	Facilitator focus / participant output
0:00-0:05	5	Opening challenge	Name one recurring task that should take 15 minutes instead of two hours.
0:05-0:13	8	What AI is - and is not	Build a practical mental model; identify appropriate and inappropriate uses.
0:13-0:25	12	Seven-part prompt framework	Construct Role, Goal, Context, Inputs, Constraints, Output and Verification.
0:25-0:38	13	Live communication demo	Turn rough notes into an email, text, call outline and verification list.
0:38-0:52	14	Participant prompt lab	Draft, peer-review and improve one prompt for a real task.
0:52-0:57	5	Verification routine	Apply the five-question pre-send review.
0:57-1:00	3	Commitment and close	Save the prompt, name its next use and define one measurement.

TRAINING 1 INSTRUCTOR GUIDE

TEACH THE FRAMEWORK THROUGH A REAL PROBLEM

Keep explanation short; make the improvement visible on screen

OPENING AND MENTAL MODEL

Opening question: “What is one repetitive task you wish took 15 minutes instead of two hours?”

Teaching point: AI can compress the time between receiving information and taking professional action. It does not replace the agent's experience, relationships, accountability or local judgment.

Plain-language model: Use AI to draft, summarize, compare, structure, transform and brainstorm. Do not assume it has verified the truth, understood missing context or applied the correct rule.

SEVEN-PART PROMPT FRAMEWORK

Part	Question	Real estate example
Role	Who should the AI act like?	Experienced agent and client-communication editor.
Goal	What result is needed?	Draft an email explaining an appraisal shortfall.
Context	What situation and audience matter?	First-time buyers; closing is scheduled in 12 days.
Inputs	What facts may it use?	Appraised value, contract price, dates and documented options.
Constraints	What must it do or avoid?	Warm tone; no promises or legal advice; under 250 words.
Output	What exact form should it take?	Subject line, three short sections and next steps.
Verification	How should uncertainty be handled?	List missing facts and flag every statement requiring confirmation.

Memorable rule: Prompting is structured communication followed by review and refinement. There is no single magic phrase.

TRAINING 1 LAB

COMMUNICATION DEMO, PRACTICE AND ASSIGNMENT

Participants finish with one prompt they can use before the next business day

LIVE DEMONSTRATION SEQUENCE

- Display rough notes from an inspection issue, appraisal concern, financing delay or multiple-offer disappointment.
- Ask the AI to identify missing facts before drafting anything.
- Create a calm client email, shorter text message, agent-to-agent update and phone-call outline from the same facts.
- Refine for empathy, clarity, next actions and the agent's natural voice.
- Ask the AI to flag statements requiring document, lender, broker or legal confirmation.
- Compare raw notes, first draft, verification list and final human-reviewed version.

REUSABLE COMMUNICATION PROMPT

Act as an experienced real estate professional and client-communication editor. Help me communicate about [situation] to [audience]. Use only the facts I provide. Before drafting, list missing information and ask up to five focused questions. Then create [email/text/call outline] in my natural voice, with a calm tone, plain language and clear next steps. Do not give legal, tax or financial advice; do not invent facts or promises. Keep the final draft under [length]. After drafting, list every statement I should verify and the source I should use.

PARTICIPANT LAB AND DEBRIEF

- ☐ Choose one recurring communication task and write the desired business result in one sentence.
- ☐ Build all seven prompt components; do not omit Verification.
- ☐ Exchange prompts with a partner and circle missing context, vague constraints or unclear output instructions.
- ☐ Revise, run the prompt and apply the verification routine before saving it.

Between-class assignment: If the classes are scheduled separately, use the saved prompt twice. Log the task, time normally required, time actually required, changes you made and one lesson for the next version. For back-to-back delivery, bring the lab output directly into Training 2 and complete the field test after the program.

TRAINING 2 OF 3 | 60 MINUTES

BUILD THE CLIENT EXPERIENCE

From one approved source item to a coordinated set of useful assets

PRIMARY SKILL Workflow design	HANDS-ON RESULT Three client assets	COURSE OUTCOME Three related client or marketing assets
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LEARNING OBJECTIVES

- Map a real-estate task from trusted inputs to a specific reader decision.
- Separate analysis and calculation from drafting and formatting.
- Turn one approved source into several consistent assets without losing the agent's voice.
- Create useful content that educates first and promotes the professional through demonstrated value.

EXACTLY 60 MINUTES

Time	Min.	Segment	Facilitator focus / participant output
0:00-0:05	5	Results check-in	Share one use, time saving, correction or lesson from Training 1.
0:05-0:13	8	Source-to-assets workflow	Define reader, decision, trusted inputs, verification and output set.
0:13-0:27	14	Live report demonstration	Build a client-friendly property or financing summary from approved facts.
0:27-0:39	12	Repurpose with purpose	Create an executive summary, email, talking points and follow-up from the report.
0:39-0:51	12	Participant workflow lab	Turn one source item into three coordinated assets.
0:51-0:56	5	Voice and quality review	Remove generic language; check usefulness, consistency and calls to action.
0:56-1:00	4	Assignment and close	Name the workflow, save the assets and define the next real use.

TRAINING 2 INSTRUCTOR GUIDE

BUILD ONCE, COMMUNICATE MANY WAYS

The value is faster understanding and better decisions - not merely a polished document

THE SOURCE-TO-ASSETS WORKFLOW

Step	Facilitator question	Professional standard
1. Define	Who is the reader and what decision are they making?	Start with usefulness, not format.
2. Collect	Which facts and sources are approved and current?	Use the contract, MLS, lender, title, public record or other authoritative source as appropriate.
3. Analyze	What must be calculated, compared or organized?	Calculate separately and preserve the assumptions.
4. Draft	What explanation will make the facts understandable?	Use plain language and label estimates, assumptions and unknowns.
5. Transform	Which additional formats will help the same audience?	Keep the facts consistent while adapting length and purpose.
6. Verify	What must a human confirm before sharing?	Check numbers, property facts, dates, claims, tone and required disclosures.
7. Deliver	What is the clearest next action?	Make the next step specific without creating pressure or false urgency.

SUGGESTED LIVE REPORT DEMONSTRATION

- Choose a C2 purchase/offer report, refinance analysis, rate outlook or transaction dashboard with confidential details removed.
- Show the reader and decision first, then the trusted inputs and assumptions.
- Ask the AI to organize the facts, identify missing information and propose a client-friendly structure.
- Verify every number and source outside the prose draft; label estimates and limitations.
- Create the final report, then transform it into an email summary, agent talking points and follow-up message.

Facilitator emphasis: One source can support several outputs, but every output needs a distinct reader, purpose and review. Repetition without purpose is not a campaign.

TRAINING 2 LAB

CHOOSE ONE SOURCE AND PRODUCE THREE ASSETS

Participants practice coordinated communication rather than isolated prompting

CHOOSE A SOURCE ITEM			
Source	Possible asset 1	Possible asset 2	Possible asset 3
Listing fact sheet	Buyer screening summary	Tour question list	Agent talking points
Purchase agreement	Milestone dashboard	Buyer next-steps email	Weekly status update
Inspection notes	Issue summary	Client question list	Call agenda
Educational topic	Helpful article	Client FAQ	Short video outline
Open-house notes	Personal follow-up email	Short text	30-day touch plan
SOURCE-TO-ASSETS PROMPT			
Act as a real estate workflow strategist and editor. My approved source is [describe or paste nonconfidential material]. The audience is [audience], and the decision or action I want to support is [decision]. First, separate verified facts, assumptions, estimates, missing information and items requiring professional confirmation. Then create these three assets: [asset 1], [asset 2] and [asset 3]. Keep all facts consistent, adapt the tone and length to each format, retain my voice and avoid hype. End each asset with an appropriate next step. Finish with one consolidated verification checklist.			

QUALITY REVIEW

- ☐ Useful: Does each asset answer a real client question or help a decision?
- ☐ Consistent: Are names, dates, figures, assumptions and next steps identical where they should be?
- ☐ Human: Does the writing sound like this professional rather than a generic advertisement?
- ☐ Verified: Can every material claim be traced to a trustworthy source?
- ☐ Appropriate: Does the content respect confidentiality, fair housing and brokerage policy?

Between-class assignment: If the classes are scheduled separately, use one three-asset set in a real business workflow. Record response, edits, total time and what should become a reusable template or SOP. For back-to-back delivery, use the lab output to build the Training 3 SOP, then complete the field test after the program.

TRAINING 3 OF 3 | 60 MINUTES

BUILD THE BUSINESS SYSTEM

From individual prompts to repeatable workflows, safeguards and measurable improvement

PRIMARY SKILL Systems and safeguards	HANDS-ON RESULT Repeatable SOP	COURSE OUTCOME A documented SOP and 30-day rollout plan
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LEARNING OBJECTIVES

- Apply the responsible-AI checklist before sharing work or expanding a workflow.
- Prioritize workflows by impact, frequency, risk and implementation effort.
- Document the approved inputs, steps, human decision points, output and review standard.
- Create a Living AI Playbook and a 30-day measurement plan.

EXACTLY 60 MINUTES			
Time	Min.	Segment	Facilitator focus / participant output
0:00-0:05	5	Evidence check-in	Share one real use, response, correction or lesson from Training 2.
0:05-0:15	10	Responsible AI	Apply confidentiality, fair-housing, accuracy, image, copyright and review controls.
0:15-0:27	12	Choose the right workflow	Score recurring tasks by impact, frequency, risk and effort.
0:27-0:40	13	Build the SOP	Document inputs, steps, prompts, human decisions, checks, owner and storage.
0:40-0:50	10	Living AI Playbook	Create a weekly learning, experimentation and documentation rhythm.
0:50-0:57	7	30-day implementation plan	Set one workflow, baseline, target, review dates and stop rule.
0:57-1:00	3	Commitment and close	State what will be produced differently tomorrow morning.

TRAINING 3 INSTRUCTOR GUIDE

RESPONSIBLE AI FOR REAL ESTATE

Protect clients, licenses, reputations and the public before scaling

Risk area	Required practice	Facilitator example
Confidentiality	Use broker-approved tools and workflows. Redact names, account data, financial records, credentials and access details unless the system and use are explicitly approved.	Do not paste a borrower package or unredacted contract into an unapproved tool.
Fair housing	Never steer, rank, exclude, target or describe people or neighborhoods using protected characteristics. Review generated language and targeting.	Reject prompts seeking "ideal" residents or demographic neighborhood rankings.
Accuracy	Verify property facts, laws, forms, rates, calculations, citations and market claims with authoritative sources.	Treat confident language as a draft until the underlying source is checked.
Misrepresentation	Do not misleadingly alter property condition, features, testimonials or reviews. Disclose material enhancement when required.	Virtual staging must not conceal defects or invent permanent features.
Copyright and permission	Confirm rights to photos, floor plans, logos, copy and uploaded materials. Do not assume output is unique or unrestricted.	Use approved brand assets and licensed photography.
Human responsibility	The licensee remains accountable for the final communication, recommendation and decision.	Keep approval and escalation steps in every SOP.

THE PRE-SHARE PAUSE

- ☐ Would I place these inputs in an ordinary business email or an approved system?
- ☐ Can I identify the source for every material fact, number and claim?
- ☐ Could this language steer, exclude, stereotype, mislead or create an unintended promise?
- ☐ Do I have permission to use every photo, document, logo and testimonial?
- ☐ What requires broker, lender, title, legal, tax or other professional confirmation?
- ☐ Am I personally prepared to take responsibility for the final version?

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

TRAINING 3 LAB

TURN A SUCCESSFUL PROMPT INTO A REPEATABLE SOP

The system should save time, improve quality and make human responsibility visible

WORKFLOW PRIORITY SCORE			
Factor	1 point	3 points	5 points
Frequency	Occasional	Weekly	Daily or per transaction
Impact	Convenience	Meaningful time or quality gain	Direct client-service or revenue impact
Effort	Large rebuild	Moderate setup	Simple to implement
Risk	High or unclear	Manageable with review	Low with clear controls

Add Frequency + Impact + Effort + Risk. Start with a workflow that scores 15-20 and can be tested safely within one week.

MINIMUM VIABLE SOP

- ☐ Name and purpose: what recurring problem does the workflow solve?
- ☐ Approved inputs and sources: what may be used, and what must be removed or redacted?
- ☐ Trigger and owner: when does the workflow begin, and who is responsible?
- ☐ Steps and saved prompts: what sequence turns the input into the output?
- ☐ Human decisions: where must a licensed or responsible professional intervene?
- ☐ Verification and escalation: what is checked, by whom, and when must the workflow stop?
- ☐ Output, delivery and storage: what is produced, who receives it and where is the approved version retained?
- ☐ Measurement: baseline time, target time, edit rate, errors, response and business result.

30-day plan: Week 1 - establish the baseline and run three supervised tests. Week 2 - refine the prompt and checklist. Week 3 - document the SOP and test consistency. Week 4 - review time saved, corrections, client response and risk; keep, revise or stop the workflow.

PARTICIPANT HANDOUT 1

SEVEN-PART PROMPT FRAMEWORK

A reusable structure for professional real estate work

Component	Write this before prompting
1. Role	Act as _____
2. Goal	Help me produce / decide / understand _____
3. Context	The situation, reader and stakes are _____
4. Inputs	Use only these facts and sources _____
5. Constraints	Do / avoid / length / tone / policy _____
6. Output	Return the result as _____
7. Verification	Ask for missing facts; flag uncertainty and items to confirm with _____

FIVE USEFUL REFINEMENT INSTRUCTIONS

- Ask me the five questions that would most improve this result.
- Retain my voice; remove generic, exaggerated or repetitive language.
- Shorten this without removing the decision, supporting facts or next step.
- Identify every unsupported claim, assumption, inconsistency and missing source.
- Critique this as the intended reader, then produce a corrected final version.

Prompt chain: Analyze → identify missing information → draft → critique → verify → revise → human approval. Save the prompt only after the complete workflow succeeds.

PARTICIPANT HANDOUT 2

RESPONSIBLE AI PRE-SHARE CHECKLIST

Use before sending, posting, publishing or automating any AI-assisted work

INPUTS AND PERMISSIONS

- ☐ The tool and use case are approved by my brokerage or organization.
- ☐ Sensitive or personally identifying information is omitted or properly protected.
- ☐ I have permission to use every uploaded document, image, logo and testimonial.

FACTS, FAIRNESS AND PRESENTATION

- ☐ Every material property fact, date, figure, rate, rule and citation has been verified.
- ☐ Estimates, assumptions and unknowns are clearly labeled.
- ☐ The language and targeting do not steer, exclude, stereotype or discriminate.
- ☐ Images and descriptions do not misrepresent condition, features, location or results.
- ☐ The content does not make promises, guarantees or professional conclusions I cannot support.

HUMAN ACCOUNTABILITY

- ☐ The output sounds like me and fits the audience, purpose and transaction context.
- ☐ Required broker, lender, title, legal, tax or other professional review is complete.
- ☐ The next step is accurate, clear and consistent with the governing documents.
- ☐ I am comfortable putting my name, license and professional reputation on the final version.

Stop rule: If the source, permission, rule or factual answer is unclear, pause the workflow and verify before sharing.

PARTICIPANT HANDOUT 3

LIVING AI PLAYBOOK AND 30-DAY SCORECARD

Small daily practice, documented weekly, produces compounding skill

Day	Practice	Business result to capture
Monday	Foundations and focus: learn one concept; identify three possible uses.	One selected task and intended outcome.
Tuesday	Skill building: practice one feature and apply it to real work.	One saved prompt or technique.
Wednesday	Experimentation: run two or three safe variations.	Best version and why it worked.
Thursday	Deep work and systems: refine a workflow and document the steps.	Draft checklist or SOP.
Friday	Integration and teaching: explain one lesson in plain language.	Team feedback or reusable note.
Saturday	Innovation and strategy: brainstorm five uses; score impact versus effort.	One small prototype to test.
Sunday	Reset and growth: review, plan and protect attention.	One learning goal and one system to refine.

30-DAY WORKFLOW SCORECARD

Measure	Baseline	Day 7	Day 14	Day 30
Minutes per task	_____	_____	_____	_____
Human edits required	_____	_____	_____	_____
Factual corrections	_____	_____	_____	_____
Client / agent response	_____	_____	_____	_____
Decision: keep / revise / stop	_____	_____	_____	_____

Closing question: What will you produce differently tomorrow morning - and how will you know it is better?