

AI for Real Estate Professionals — Workbook

This workbook turns the course into tools you use on every transaction: a property fact sheet, a Fair Housing review habit, listing and marketing prompts, a market-report builder, client message templates, follow-up cadences, and a social content system. Work through one section per module, filling the worksheets and running the prompts in ChatGPT or Claude as you go. By the end you will have a complete, reusable operating system and a prompt library you can run on autopilot, with verification built in so AI never reaches a client unchecked.

AI Foundations for Agents and Compliance Guardrails

Set up your tools, build the fact sheet every later exercise depends on, and lock in the Fair Housing review habit.

Worksheet: Property Fact Sheet

Complete every field for one real listing. Write UNKNOWN where you have not verified a fact, then go confirm it before writing any copy. This is the single source you paste into every prompt in this workbook. Address, list price, property type, year built

Beds, baths, finished sq ft, total sq ft, lot size

Renovations with dates (kitchen, bath, flooring)

Systems and ages (roof, HVAC, water heater, windows)

Outdoor features (yard, deck, pool, view, fencing)

Parking and garage

HOA fee, frequency, what it covers, key rules

Annual taxes and recent comparable sales

Average days on market for the area

Seller motivation, showing rules, closing timeline

Verifiable location features (parks, transit) — no demographic claims

Checklist: Fair Housing Review Checklist

- Removed all references to family, kids, retirees, bachelors, or newlyweds
- Removed religious references (near churches, walk to synagogue)
- Removed demographic or ability signals (safe area, exclusive, no wheelchair needed)
- Removed national-origin or language cues (English-speaking neighborhood)
- Copy describes the property and features, never the type of person who would live there
- Replaced judgments with verifiable features (safe and quiet became established with mature trees)
- Required fair housing statement and brokerage identification are present
- Asked the AI to flag any protected-class language it had to remove

Exercise: Build Your Reusable Compliance Block

Create the fixed text you will paste into the top of every content prompt. Save it as the first entry in your prompt library so every listing, report, and post starts compliant by default.

- Draft a compliance block that tells the model: use ONLY the facts I paste, write UNKNOWN for anything missing, invent nothing.

- Add the instruction to describe only the property and never the type of person who would live there.

- List the banned protected-class trigger words and ask the model to flag any it removes, then add your required disclosure and brokerage line.

Writing Listings and Property Marketing with AI

Turn the fact sheet into a compliant listing and a full marketing package, then adapt it across length and platform.

Exercise: Draft a Listing from Your Fact Sheet

Paste your compliance block and fact sheet, then run the listing prompt. Verify every number against the fact sheet before you consider it usable, and run the Fair Housing checklist over the result.

- You are an experienced listing agent. Write an MLS description using ONLY these facts; open with the single most compelling verifiable feature, then layout, dated upgrades, outdoor space, and location features. About 180 words, warm but not exaggerated.

- Generate two alternate openings that lead with a different standout feature so I can compare.

- Review your own draft and list any phrase that could imply a preference for a protected class, then rewrite it.

Worksheet: Marketing Package Planner

Fill the inputs, then ask AI to produce the whole package in one request. Capture your chosen final version of each asset here so the listing reads consistently across every channel.

Standout feature to lead with

Headline (chosen from three options)

Tagline

Six feature bullets (benefit-first, no hype words)

40-word email teaser

60-word flyer paragraph

Instagram caption with three hashtags

Just-listed MLS-safe one-liner

Checklist: Listing Copy Edit Checklist

- Cut filler adjectives (stunning, gorgeous, immaculate, dream, must-see)
- Replaced vague claims with specifics (spacious became 1,640 sq ft)
- Verified every number against the fact sheet one final time
- Ran the Fair Housing ban list over headline and captions, not just the description
- Generated three headline options and chose the strongest
- Confirmed all four repurposed versions (MLS, portal, email, social) match on every fact

Exercise: Repurpose One Listing Across Platforms

Take your approved master description and reshape it into four formats without changing any number or feature. Verify once on the master, then carry compliance forward.

- Using only the facts in this approved description, produce an MLS version (160 words), a portal version (220 words), a 50-word email teaser, and a 60-word Instagram caption with three hashtags. Change no numbers or features and keep my voice consistent.

- Confirm that price, square footage, and bed and bath counts are identical across all four versions.

- Flag any version that drifted in tone from my master draft and align it.

Market Reports and Client Communications

Turn verified market data into a client-ready report and build the message templates a transaction repeats.

Worksheet: Market Report Data Inputs

Pull current figures from your MLS or CMA tool and record them here. Paste these into the market-report prompt; never let AI supply a number from memory. Mark anything you cannot confirm as UNKNOWN.

Median sale price (area, period)

Active comparable listings (address, price, sq ft)

Sold comparables (address, sale price, days on market)

Average days on market

Months of inventory

List-to-sale price ratio

Price per square foot range

Your one-sentence recommendation to the client

Exercise: Generate a Client-Ready Market Report

Run the market-report prompt using only your recorded data. The goal is a report a client can read in two minutes and repeat to a spouse. Verify the headline takeaway matches the numbers.

- You are explaining a local market to a client with no real estate background. Using ONLY this data, write a one-sentence headline takeaway, three bullets on what it means for pricing, a plain explanation of days on market and inventory, and a closing recommendation. Define any term you must use.
- Translate months of inventory and list-to-sale ratio into plain language a first-time seller would understand.
- Rewrite the report at a warmer, more reassuring tone without changing any figure.

Worksheet: Client Message Builder

Use this to brief AI for any recurring client message. Complete it once per moment (for example, seller after showings with no offer), then save the approved output to your template library labeled by moment. The exact moment (e.g., buyer after losing a multiple-offer bid)

Recipient (buyer / seller / coordinator)

My voice description (e.g., direct, encouraging, never pushy)

Facts to include (and UNKNOWN for anything I lack)

Goal of the message

Single clear next step for the client

Email version (final)

Text version (final)

Checklist: Client Communication Quality Checklist

- AI invented no feedback, offers, or buyer interest — only what actually happened is included
- Length matches the moment (bad news short and personal, logistics templated)
- Removed robotic phrases unless they are genuinely my voice
- Read offer, inspection, and bad-news messages myself before sending
- Every local fact (closing costs, timelines, HOA rules) is verified, not guessed
- School and neighborhood claims are sourced or removed (no steering)

Follow-up Automation and Social Media Content

Build nurture cadences and a repeatable social system, then lock in the verification routine that keeps it all safe.

Worksheet: Follow-up Cadence Designer

Design one cadence per relationship type. Draft all touches with AI in a single request, then load the schedule into your CRM (Follow Up Boss, kvCORE, LionDesk) so it handles timing and reminders.

Relationship type (new lead / past client / stale prospect / sphere / open house)

Their stated interest or situation

Touch 1 timing and angle

Touch 2 timing and angle

Touch 3 timing and angle

Touch 4 timing and angle

Ongoing touch (e.g., monthly market update)

Which touches are automated vs. personalized by hand

Exercise: Multiply One Source into a Week of Social Posts

Feed one listing or market report plus your compliance block into the content-multiplier prompt. Pick the strongest hook, verify every stat, and batch-schedule the results so you stay visible without a daily scramble.

- Using this fact sheet and my compliance block, write one Instagram caption with three hashtags, one Facebook post, one LinkedIn insight post, and one 30-second video script with a strong hook in the first line. Ban protected-class language and hype words.

- Give me three alternate hooks for the video so I can choose the strongest.

- Outline a five-slide carousel that teaches one idea, such as how to read days on market, from the same source.

Checklist: Verification Routine Checklist

- Every number checked against the source (MLS, CMA, disclosure, HOA document)
- Every claim about schools, zoning, flood, or crime is sourced or removed
- Fair Housing ban list run over all public-facing copy and captions
- Required disclosures and brokerage identification present on every asset
- AI-enhanced or virtually staged images disclosed where the platform or MLS requires
- No false personalization in automated messages (no I noticed you loved the kitchen unless they said so)
- High-stakes messages (offers, inspections, bad news) read by a human before sending

Exercise: Assemble Your AI Operating System

Pull everything into one workflow you will actually follow. Document where each prompt and template lives and what AI is never allowed to do, so the system survives a busy week.

- List my weekly AI workflow: new-listing steps, per-lead cadence trigger, weekly market report and social batch, milestone client templates, and monthly library cleanup.

- Write my one-page AI policy: what AI drafts, what I always verify, and what only a human sends.

- Audit my prompt library and flag any prompt missing the compliance block or the use-only-my-facts rule.

Your Action Plan

1. Build your Property Fact Sheet template and complete it for one live listing, marking unverified facts UNKNOWN.
2. Create your reusable compliance block (use-only-my-facts plus the Fair Housing ban list) and save it as entry one in your prompt library.
3. Run the listing and marketing-package prompts on a real property, then verify every number and run the Fair Housing checklist.
4. Use the repurposing prompt to produce MLS, portal, email, and social versions from one approved master draft.
5. Pull current market data and generate one client-ready market report you can read in two minutes.
6. Build three to five client message templates (new-listing alert, showing feedback, offer update, inspection summary, closing congratulations) and save them by moment.
7. Design follow-up cadences for new leads, past clients, and stale prospects, then load them into your CRM.
8. Run the content-multiplier prompt to batch a week of platform-specific social posts from one source and schedule them.
9. Adopt the verification routine as a non-negotiable final step before anything reaches a client or the MLS.
10. Each month, prune the prompt library, refresh your voice description, and review what AI produced for accuracy and tone.

