

A LUNCH-AND-LEARN FOR REAL ESTATE AGENTS

AI for Realtors

Your AI assistant, better prompts, automations,
and content tools you can use this week

[Your Name] • Loan Officer • Movement Mortgage • NMLS #[_____]

Adapted from AI + Agents, Season 1, with David Colgan & Jake Fehling

OPENING • QUICK POLL

What are you using AI for right now?

Raise your hand if you use it for...

1 Emails and texts

2 Property descriptions

3 Social media content

48%

of Realtors use AI daily (23%) or weekly (25%)

75%

of agents who use AI use it for listing descriptions

63%

say the learning curve is their biggest tech challenge

THE PREMISE

AI won't replace agents.

**Agents who use AI
will out-serve the ones who don't.**

AI amplifies what you're already good at. You stay:

the expert

the relationship

the final say

TODAY

Four parts, about 45 minutes

01

Your AI Assistant Awaits

Make it sound like you, connect your apps, and pick the right mode

ABOUT 9 MIN

02

Prompt Like a Pro

No magic words: delegate clearly and stack your prompts

ABOUT 9 MIN

03

Automate the Mundane

Let recurring work run on a schedule while you sell

ABOUT 9 MIN

04

Clip, Create, Convert

Turn AI output into decks, short clips, and video

ABOUT 9 MIN

Demoed in ChatGPT, as in the series. The principles work in Claude, Gemini, Copilot, and others.

Make it sound like you

Generic output is why most people give up. Personalize it once, and every draft starts from you.

CUSTOM INSTRUCTIONS

How it talks to you: “Tell it like it is.”

ABOUT YOU

What you do, where, and the brand you represent.

MORE ABOUT YOU

Hobbies, passions, and awards: the details that sound human.

BANNED WORDS

One firm banned “nestled.” It never came back.

YOUR PROFILE, FILLED IN

What I do: [residential real estate, buyers and sellers]

Where: [Wake County, NC]

Brand: [your brokerage]

More about me: [hobbies, passions, awards]

Tone: [straight shooter, warm, no fluff]

Never use: [nestled, em dashes]

In ChatGPT: profile menu → Personalization

PART 1 • YOUR AI ASSISTANT AWAITS

Connect your apps

FIND ANYTHING, ANYWHERE

Connect Gmail, Google Drive, or Dropbox. Then just ask:

Find the home inspection for [123 Main Street] and show it to me.

It works out which app to search on its own.

YOUR BUYERS ARE ALREADY HERE

Zillow is connected inside ChatGPT. A buyer can type:

Show me homes for sale in [North Carolina] with [a creek running through the property].

It searches across MLS areas in one go. Know what your clients see.

In ChatGPT: Settings → Apps & Connectors. Use the + button to aim a request at one app. Connect only what you and your brokerage are comfortable with.

Three ways to ask

TYPE AND ENTER

Quick answers

Everyday questions and simple drafts. No setup.

“Where are the best tacos in town?”

DEEP RESEARCH

Finds what already exists

Asks clarifying questions, then returns a detailed report with sources.

CMAs, market reports, “Why isn’t this home selling?”

AGENT MODE

Creates what doesn’t exist yet

Works on its own for minutes, like handing a task to an assistant.

A 90-day business plan, a marketing plan, a listing presentation

THE RULE If it touches your reputation or your economics, turn on a mode. Both modes come with paid plans; limits vary.

No magic words. Be a good delegator.

01 Talk the way you talk

Plain language works. So do typos and bad grammar.

02 Be specific about the outcome

“Specificity is the rule of the day.”

03 Say what you’ll do with it

The use case shapes the answer you get back.

SAME REQUEST, MORE PARAMETERS

Create a business plan for me for [next year]. Assume I’m a real estate agent in [Raleigh, NC] and I want to sell [50] homes. Assume I have a budget of [\$1,000] per month. I want to market on [social media and postcard farming]. Focus on homes in ZIP code [27609], and tailor the plan to those potential clients.

Stack your prompt

Most people stop at the first question. Go two or three levels further.

LEVEL 1

This home at [address] hasn't sold. Why not?

Where most people stop

LEVEL 2

I'd like to get it sold. Tell me what I can do to sell it, which buyer needs and home features to market, and what challenges I have to overcome.

Needs and features, never demographics

LEVEL 3

Now write a script for a short video aimed at buyers looking for those features.

Now do something with it

Borrow a voice, then rehearse

IN THE VOICE OF

Script the conversation

In the voice of [a coach or speaker you admire], give me a script for a price-reduction conversation with the seller of [address].

ROLE-PLAY

Practice the pushback

Be a very difficult seller. What are the most likely objections you'd raise when I bring up a price reduction? Then coach me on how to answer each one.

As Jake put it in Round 2: “steal like an artist.” Borrow the style, then make it yours.

Anatomy of an automation

WHEN

A time of day, plus your time zone

HOW OFTEN

Daily, weekly, or the first of the month

WHAT

The task, in plain words, as if delegating to a person

PROMPT

Each morning at [7 AM Eastern], give me a complete breakdown of the real estate market in ZIP code [27609]. Include average days on market, list vs. sale price, and inventory levels compared with last year.

THEN TYPE

Show me one now.

Automations worth stacking

EVERY WEEKDAY

One briefing, not ten

Every weekday at [7:30 AM Eastern], give me one briefing: the market in [ZIP], emails I haven't answered but should, today's schedule, deals and leads to follow up on, and one motivational quote.

EVERY MONDAY

Content ideas

Every Monday at [7 AM Eastern], deliver the most relevant social media content ideas for a real estate agent in [market], based on what's trending and likely to get the most engagement.

EVERY FRIDAY

Reputation check

Every Friday at [9 AM Eastern], search for me, [name, brokerage, market], the way a consumer would. Tell me what you find and anything that would make someone hesitate to hire me.

Hand off the listing presentation

PROMPT • TURN ON DEEP RESEARCH OR AGENT MODE

Treat this as a live deal. Here's the address: **[address]**. Assume I'm trying to win the listing. Create a full listing presentation with a CMA, notes to use when speaking to the seller, and the buyer needs and home features we should market to.

IF IT ASKS QUESTIONS

Answer briefly, or say "Use whatever you can find."

ASK FOR A RANGE

Test the market, need to sell, or fine waiting.

IN THE SERIES

Deep research: about 12 minutes. Agent mode: about 10.

Start it now. In Part 4, we'll turn the result into a finished deck.

Gamma: from text to presentation

ChatGPT is the engine. Gamma turns its output into something clients want to look at.

1

Download

Save the listing presentation from ChatGPT as a PDF or document.

2

Import

In Gamma: create new, import the file, and choose Presentation.

3

Generate

Change nothing the first time. Add your logo and photos after.

ALSO MAKES One-pagers, flyers, social posts, web pages, buyer guides, and team handbooks.

OpusClip: one video, many clips

20

short clips from one 15–20 minute Zoom conversation, in the series' example

Alternatives: Descript, or Riverside for podcasts

- 1 Record a 10–15 minute Zoom interview with a local business owner, community leader, or nonprofit.
- 2 Upload the recording, or paste a YouTube link.
- 3 Click “Get clips in one click.” Each clip comes back with a score.
- 4 Trim, add captions or B-roll, then schedule or download.

Use your own content, or get the owner's and your guest's permission first.

HeyGen: your digital twin

LOOK AT THE LENS

Put the script right below your camera. Your eyeline becomes the avatar's.

AUDIO MAKES OR BREAKS IT

Use an external mic, or record a phone voice memo and attach it.

THE WORDS DON'T MATTER

It's learning your voice, cadence, and mannerisms, not your script.

THEN, SCRIPTS FROM CHATGPT

Give me 30 short video scripts for the next 30 days about [local events], [our market], and [home maintenance tips]. About 30 seconds each, in my voice.

Paste a script into HeyGen, pick your avatar, and generate.

Only your own likeness. Label AI-generated video where your platform or brokerage requires it.

BEFORE YOU POST

Guardrails for every draft

Fair Housing

Market the home and buyer needs, never demographics. Avoid phrases like “family-friendly neighborhood” or “safe area.”

Privacy

Never paste client SSNs, financials, or contract PDFs. Connect only accounts your brokerage allows.

Numbers

AI market data is directional. Verify prices, comps, and square footage against your MLS.

Media

Disclose virtually staged or AI-edited photos per MLS rules. Label AI avatar video where required.

Permission

Use your own content. Get the owner’s and your guests’ OK before you clip it.

Ownership

You own what you publish. AI drafts; you review, edit, and approve.

MAKE IT STICK

Your 30-day plan

WEEK 1

Personalize + connect

Fill in your profile, connect your apps, and decide on a paid plan.

WEEK 2

Stack a real prompt

Take one listing three levels deep. Run Level 2 with deep research.

WEEK 3

Build your briefing

Create one stacked daily briefing. Test it with “Show me one now.”

WEEK 4

Make one thing visual

Turn one output into a Gamma deck, a set of clips, or an avatar video.

BY DAY 30 An assistant that sounds like you, one automation running every day, and one piece of content in a new format.

CLOSE

Your next step

Pick one. Do it before the end of the day.

1

Fill in your
personalization
profile

2

Stack one prompt on
a real listing

3

Create one
automation, then
“Show me one now”

4

Turn one output into
a Gamma deck

David’s challenge at the end of Round 3: create an automation as soon as the session ends.

Q & A

Questions?

About AI, the tools we covered,
or the financing questions your buyers ask.

THANK YOU

I'm your resource for financing questions and buyer education.

Happy to answer the financing FAQs your buyers ask.

[Your Name]

Loan Officer · Movement Mortgage · NMLS #[_____]

[Phone] · [Email] · [Website or scheduling link]

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