NEXTSTEP
STRATEGIES, LLC

Prompts That Pay This Week

A plain-English AI playbook for real estate agents

You don't need any AI experience to use this. If you can copy and paste, you can do everything here. Each prompt does a job you already do by hand, just faster.

First, the basics

- **AI here means a chat window.** You type a request and it writes back. ChatGPT, Gemini, Claude and Copilot all work the same way. The free versions are fine.
- **A prompt is the request you type.** The prompts in this guide are already written. You copy one, fill in the blanks and paste it in.
- **Blanks look like [this].** Replace the brackets and the words inside them with your own information.
- **What it writes is a draft.** AI is fast but it makes mistakes. Read everything before it goes to a client.
- **Talk to it like an assistant.** If you don't like the answer, tell it: "shorter," "friendlier," "try again," or "I'm not sure, what do you think?"

Pick your app

- **Use the one your brokerage approves.** Ask your broker first.
- **If nothing is approved,** use the one tied to the email you already use: Gemini if you use Gmail, Copilot if you use Outlook. ChatGPT and Claude work well too.
- **Start with the free version.** Pay only once you're using it every week.
- **Get the phone app too.** You'll use it more from the car than from your desk.

Turn on privacy (2 minutes)

Most AI apps can use your chats to train future versions unless you turn that off. In your app's Settings, look for **Data controls** or **Privacy** and turn off the option to use your chats for training or model improvement. For anything sensitive, use a **temporary chat** if your app has one. Your broker's rules come first.

How to run any prompt

1. Open your AI app and start a new chat.
2. Copy a prompt from one of the shaded boxes in this guide.
3. Paste it into the chat and replace every [bracket] with your details.
4. Press Enter. Read the answer. Ask for changes until it's right.

Let the AI coach you through this guide

Saving this guide in Google Drive is a good place to keep it, but the AI can't see it there on its own. It only reads what you hand it. Then do one of these. To copy prompts with one tap, use the web version at **nextstepstrategiesgeorgia.com/agents**.

- **Simplest:** start a new chat, attach this PDF with the paperclip or + button, and paste the coach prompt below.
- **Better:** add this PDF to a Project (ChatGPT or Claude) or a Gem (Gemini). It stays there for every chat, so you only upload it once. Gemini can also pull the file straight from your Google Drive.

> **COPY THIS: COACH PROMPT**
>
> I'm a real estate agent and I'm brand new to AI. I attached a guide called "Prompts That Pay This Week." Be my coach.
>
> Walk me through it one step at a time, starting with Step 1. Ask me one question at a time and wait for my answer. Use plain words and no tech terms. Don't move to the next step until I type "next."
>
> When we get to the prompts, help me pick the one that will save me the most time this week, then help me fill in the blanks.

Step 1: Teach your AI who you are

One time, about 20 minutes. The better your AI knows you, the less you rewrite. Instead of filling out a form, let the AI interview you. At the end it writes a one-page profile you save and reuse. That profile tells it who you are, how you sound, and how comfortable you are with AI, so it knows how much to explain and how fast to go.

1a. Let the AI interview you

Copy this into a new chat. Answer in your own words, like you're talking to a new assistant on their first day. Type "skip" for anything you don't want to answer.

> **COPY THIS: THE INTERVIEW**
>
> I'm a real estate agent and I want you to get to know me so you can help me better. Interview me.
>
> Rules for the interview:
> - Ask one question at a time and wait for my answer.
> - Keep questions short and in plain words. If I seem unsure, explain with an example.
> - If I type "skip," move on.
> - Cover these five areas, in this order:
>
> 1. Me and my business: my name, brokerage, the area I work, years in real estate, my typical clients, price range, where most of my business comes from, my goals for the next 12 months, and the tasks that eat most of my time.
>
> 2. How I work: the tools I use (phone, email, CRM, MLS, social media), when I work, and whether I have a team or assistant.
>
> 3. How I sound: my tone, words I like, words I'd never use, and how I sign off. Ask me to paste 2 or 3 real texts

or emails I've sent.

4. My AI comfort level: how often I've used AI, what I've used it for, how confident I feel, and how I like things explained. Place me at Level 1, 2, 3 or 4 (1 = brand new, 4 = uses it daily). Tell me which level you picked and why, and let me correct you.

5. My rules: confirm these with me and ask if I want to add any.
- Don't make up facts, numbers or market data. Ask me instead.
- Follow Fair Housing. Describe homes, not the people who should live in them.
- Don't promise rates, payments, values or outcomes.
- Follow my brokerage's advertising rules.
- Never ask for private client information like Social Security or account numbers.

When we're done, write "My AI Profile" with these headings: About me, My clients and market, My goals, How I work, How I sound (include my sample messages), My AI level and how to work with me, My rules.

Under "My AI level and how to work with me," write specific instructions for yourself that fit my level. Include: how much to explain, how many steps at a time, whether to give me choices or just your best answer, and one new AI skill to teach me next. Add this line: "When I seem ready, suggest moving me up a level."

Keep the profile to one page. Then ask me if anything is wrong.

The four AI levels

Your AI picks your level from your answers. Here's what each one means for how it works with you.

Level	Sounds like you	How your AI should work with you
1. Brand new	"I've never really used it."	One step at a time. No tech words. Explains why. Checks that you're following.
2. Getting started	"I've tried it a few times."	Short steps. Explains new terms once. Suggests one new trick a week.
3. Comfortable	"I use it most weeks."	Skips the basics. Gives full drafts. Points out where you could save more time.
4. Confident	"I use it every day."	Brief answers. Pushes back on your ideas. Suggests saved workflows and shortcuts.

There's no wrong level. Starting at 1 just means your AI slows down and teaches as it goes.

1b. Save your profile so it loads every time

1. Copy the whole profile the AI wrote.
2. Paste it where your AI app keeps standing instructions. In Settings, look for "Personalization" or "Custom instructions." If you use a Project (ChatGPT or Claude) or a Gem (Gemini), paste it into that Project's or Gem's instructions instead.
3. Save a copy in Google Drive called "My AI Profile" so you can update it later.
4. Test it. Start a brand new chat and ask: "What do you know about me, and how should you work with me?" If it can't tell you, the profile didn't save. Try step 2 again.

If your app has no place to save instructions, paste the profile at the top of each new chat.

1c. Give it a tune-up once a month

You'll change and so will your business. Once a month, paste your current profile into a new chat with this prompt, then save the new version over the old one.

> **COPY THIS: MONTHLY TUNE-UP**
>
> Here is my current AI Profile:
> [paste your profile]
>
> Ask me 5 short questions, one at a time, about what's changed in my business, my goals, and how I'm using AI now. Then:
> 1. Tell me if I should move up a level, and why.
> 2. Give me the updated profile.
> 3. Suggest one new way AI could save me time next month.

Tip: any time your AI gets something wrong about you, correct it and add the fix to your profile. Every correction you save is one you never have to make again.

Use it from your phone with your voice

You don't have to type. In the phone app, tap the **microphone** to dictate a request, or the **voice** button to have a back-and-forth conversation out loud. Try it on the drive home: "Here's what happened at my 3 o'clock showing..." and then ask for the follow-up text. Review it before you send, and only once you're parked.

Step 2: Pick one job and try it

Start with one. When it feels easy, add another. Every prompt ends with what to check before you send.

Answer a new lead in 5 minutes

Use it when a new inquiry comes in. The agent who answers first usually gets the conversation.

> COPY THIS
>
> A new lead just came in. Here's what I have:
> [paste their message, name, where they found me, and the home or area they asked about]
>
> Write me:
> 1. A text I can send right now. Under 300 characters. Answer their question, ask one easy question back, no pressure.
> 2. A short email with the same information plus one helpful detail.
> 3. Three questions to ask when I call, to learn their timeline, how they're paying, and why they're moving.

Before you send: make sure the details about the home are correct.

Check in with past clients and people you know

Use it once a week, Monday morning. Ten personal texts in about 15 minutes.

> COPY THIS
>
> Here are [10] past clients and friends, with what I know about each one:
> [Name - how I know them - when we last talked - something personal they've shared, like kids, a new job or a home project]
>
> Write a short, personal text to each one. No sales pitch. Mention what I know about them and end with a question they'd enjoy answering. Make each one sound different. Two sentences max.

Before you send: only use things people told you themselves.

Market a new listing

Use it when you take a new listing. One set of notes in, a week of marketing out.

> COPY THIS
>
> Here are my notes on a new listing:
> [area, bedrooms, bathrooms, square feet, lot size, year built, upgrades, best features, HOA, what the sellers love most]
>
> Write:
> 1. An MLS description under [character limit] characters. Start with the best feature.
> 2. Five social media captions: just listed, open house, feature spotlight, neighborhood, last chance.
> 3. An open house invitation email.
> 4. Six bullet points for a flyer.
>
> When you're done, check everything and point out any words that describe people instead of the home.

Before you send: every feature is real, and your ads follow your brokerage's advertising rules.

Turn your notes into a follow-up

Use it right after a showing or appointment. Record a one-minute voice memo on your phone, then copy the text your phone writes out for you.

> COPY THIS
>
> Here are my notes from a [showing / listing appointment / buyer meeting] with [first name]:
> [paste your notes]
>
> Give me:
> 1. A thank-you message to send today with the next step and a date.
> 2. A to-do list for me.
> 3. Anything personal they mentioned that I should remember.
> 4. Anything I promised them.

Before you send: the next step and date are ones you can keep.

Keep clients updated after contract

Use it once a deal is under contract. Fewer worried phone calls, and happier clients who send referrals.

> COPY THIS
>
> I have a home under contract. Here are the key dates (first names only):
> [contract date, due diligence end, financing deadline, appraisal, inspection, closing date, lender, closing attorney]
>
> 1. Make a simple timeline for my [buyer / seller] showing what happens when and what they need to do.
> 2. Write a short weekly update email I can reuse, with blanks for what changed.
> 3. Make me a list of what to check 3 days before each deadline.

Before you send: check every date against the signed contract. AI organizes the dates. It does not read the contract for you.

Practice a hard conversation

Use it before a listing appointment or buyer meeting.

> COPY THIS
>
> I have a [listing appointment / buyer meeting] coming up. Here's the situation:
> [their goals, timeline, worries, and the pushback I expect, like price, commission or signing a buyer agreement]
>
> 1. List the 5 objections I'm most likely to hear.
> 2. Give me a short, honest answer to each one in my voice. No pressure tactics.
> 3. Then pretend to be the client and push back on me so I can practice. When I type "done," tell me where I was weak.

Before you use it: run any wording about commission or buyer agreements past your broker.

Send a monthly market update

Use it once a month. Real local numbers keep you top of mind.

> COPY THIS
> Here are this month's numbers for [neighborhood or zip code] from the MLS:
> [median price, homes sold, average days on market, homes for sale, and the same numbers from last month or last year]
>
> Write:
> 1. A 4-sentence update in plain English: what this means for buyers and what it means for sellers.
> 2. A short social media version.
> 3. One question to end with that gets people to reply.
>
> Only use the numbers I gave you. Don't add any.

Before you send: every number matches what you pulled.

When it goes wrong

A bad answer doesn't mean AI doesn't work. It means the AI needs a better instruction. Type one of these.

What happened	Type this
It made up a fact or number	"Where did that come from? Only use what I gave you. Mark anything you're not sure of."
It's too long	"Cut this in half. Keep it short enough to read on a phone."
It sounds like a robot	"Rewrite this to sound like my sample messages. Plain words, no fancy phrases."
It ignored my rules	"Re-read my profile and rules, then try again."
It's confused or going in circles	Start a new chat and paste your request again. A fresh start fixes most problems.

Step 3: See if it's working

Pick two of the jobs above and use them for one work week. On Friday, fill this in. If a number doesn't move, try a different job.

What to track	Last week (best guess)	This week
Minutes to answer a new lead		
Past clients and friends contacted		
Follow-ups sent the same day		
Appointments set		
Hours spent writing		

Five rules to stay safe

1. **Keep private info out.** No Social Security numbers, account numbers, credit details or full contracts. First names and dates are enough. Ask your broker which AI tools are approved.
2. **Fair Housing still applies** to anything AI writes for you.
3. **Your brokerage's advertising rules still apply.**
4. **Check facts.** AI sounds sure of itself even when it's wrong. Verify numbers, dates and features every time.
5. **You press send.** Never let an AI tool message a client on its own.

Copy every prompt with one tap

Scan with your phone camera, or go to **nextstepstrategiesgeorgia.com/agents**. Each prompt has a Copy button.

NEXTSTEP
STRATEGIES, LLC

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Practical AI for small service businesses