TECH TOUR 2026

The Prompt Playbook

Every prompt from Tech Tour 2026, ready to copy, paste and put to work.

THE OPPORTUNITY AHEAD

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INSIDE

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How to use this playbook: each prompt sits in a dark card. Copy the text inside, replace anything in a **[HIGHLIGHTED BRACKET]** with your own details, and paste it into Claude.

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SECTION

01

Getting Started

Set up once, then let AI carry the ordinary so you can focus on the human work. Anything in a highlighted [BRACKET] is yours to fill in.

Welcome to Agentic AI

Set up Claude in five steps.

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Get a paid account	**Download the desktop app**	**Install the Chrome extension**	**Install the phone app**	**Connect your email** In Claude, add your email app (Outlook or Gmail) as a connector

TIP *Always allow, and connect your email before you try the prompts that read your inbox.*

Essential Knowledge: Skill vs. Project

A skill is the recipe
Claude reuses it for every client.

A project is the file cabinet
Everything for one client lives there.

Essential Knowledge: Texts & Phone Calls

Read these before you use any prompt that references your text messages or calls.

Texts: it reads, it doesn't sync
Claude reads what's on screen when asked, one conversation at a time. It won't automatically capture every new text into a client's project. A good habit after a busy day: "read my thread with the Hendersons and update their project."

It sees whatever's on screen
You approve access first, but other conversations and notifications are visible too. Close or mute unrelated threads before asking.

Your computer has to be on
The computer must be on with the Claude desktop app open. It won't work for an unattended early-morning recap, so schedule the "update projects from today's texts" step for the end of the day.

Phone calls
Call transcription is free on iPhone (saved in Notes). No transcription? Ask Claude to review your calls at the end of the day and record the time and duration, or simply talk to Claude about what you covered after an important call.

The God Prompt

WHEN TO USE When you are not sure how to ask. Let AI ask you first.

PROMPT · COPY & PASTE

I want to **[DESCRIBE YOUR GOAL]**. Before you do anything, ask me what you need to know. Then write the perfect prompt for this task, and run it.

TIP *Ask it what I need, before I ask it to do what I need.*

Build Your Voice

WHEN TO USE So every email AI drafts sounds like you, not like a robot.

PROMPT · COPY & PASTE

Could you help me create a skill to help you better emulate my voice in emails? I'd like it to be called **[YOUR NAME]**-Voice. Please read my outgoing sent emails to understand how I engage with my colleagues, vendors, agents and brokers.

TIP *Connect your email first, so it has your real sent mail to learn from.*

Turn It Into a Skill

WHEN TO USE Right after any task you will want to repeat.

PROMPT · COPY & PASTE

Turn what we just did into a skill.

TIP *A skill is the recipe Claude reuses for every client. Build it once, use it forever.*

“

Thought partner. Not thought leader.

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SECTION

02

Daily Automations

Scheduled tasks that run while you sleep, show, and close. Set them up once and they show up every weekday morning.

The Daily Brief

WHEN TO USE A short, scannable start to every weekday.

PROMPT · COPY & PASTE

Set up a scheduled task that gives me a morning brief each weekday at **[TIME]**: what's on my calendar, important unread emails or messages, and anything that needs my attention today. Use what you learned from reviewing yesterday's text messages to include any important to-do items. Keep it short and scannable.

Email Triage Task

WHEN TO USE Wake up to a sorted inbox and reply drafts waiting for you.

PROMPT · COPY & PASTE

Set up a weekday-morning scheduled task that triages my new mail and saves reply drafts in Outlook.

- Check my Outlook inbox for mail that came in since the last run. On Mondays, cover everything since Friday morning.
- Sort each email into a group: Urgent (needs action today), Soon, FYI, or Low/promotional. Listing blasts and marketing mail, like the **[NEWSLETTER NAME]** emails, become a single count so they don't clutter the summary.
- Summarize each email in one line: who sent it, the subject, and what they want.
- Draft replies to urgent emails and save them in my Outlook Drafts folder. Never send, delete or move anything. Where a draft needs details you don't have, leave a bracketed note like [attach invoice], and list those notes in the digest so I can fill them in before I send.

TIP *It can delete, but be careful. Starting with "never send, delete or move" keeps you in control.*

Calendar Prep Brief

WHEN TO USE The night before a full day of showings and meetings.

PROMPT · COPY & PASTE

Look at my Google Calendar for tomorrow. For each showing or client meeting, give me a 2-sentence prep note: what I need to know, bring, or confirm before I walk in the door. Flag any back-to-back conflicts.

TIP *Walk into every appointment knowing exactly what to say.*

Logging Activity in BoldTrail: Texts

WHEN TO USE With BoldTrail open in your browser, at the end of a busy day.

PROMPT · COPY & PASTE

Is it possible to update the contacts in the open tab of BoldTrail with a left message call indicating a text was sent based on the messages in Messages? I don't need the actual message and don't need any contacts created.

TIP *This is literally all I typed in to start the process.*

Logging Activity in BoldTrail: Calls

WHEN TO USE Right after the text-logging prompt, in the same conversation.

PROMPT · COPY & PASTE

Can you repeat the task of checking texts with phone calls in the phone app and update matching contacts in BoldTrail? The calls will need to be marked as incoming or outgoing based upon the activity in the app. If the call was connected for more than 20 seconds, mark it as talked to the person. Otherwise, mark it as left a voicemail. Do this for the last **[NUMBER]** days.

Capturing Texts & Calls

WHEN TO USE Keep each client's project current without retyping a thing.

PROMPT · COPY & PASTE

AFTER A BUSY DAY

Read my thread with **[CLIENT NAME]** and update their project.

NO CALL TRANSCRIPTION?

Review my calls from today. Find calls to **[CLIENT NAME]** and record the time and duration.

AFTER AN IMPORTANT CALL, JUST TALK

"Just talked to the Hendersons. They're fine with a later closing. Mark wants a second showing Saturday. Still waiting on the lender letter."

TIP *It reads, it doesn't sync, and it sees whatever is on screen. Close or mute unrelated threads first. The computer must be on with the desktop app open.*

> **Goals are for people who care about winning once. Systems are for people who care about winning repeatedly.**
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SECTION

03

The Client System

Four skills that work together: set up every new client, gather what matters from every decision maker, manage the deal daily, and learn from every closing. A skill is the recipe; a project is the file cabinet for one client.

Part 1: New Client Setup

WHEN TO USE Every time you say, "I have a new client."

PROMPT · COPY & PASTE

Create a skill called **New Client Setup**. Use it whenever I say I have a new client. When it's done, run my **Client Intake Form** skill.

1. Create a project named **[Last Name] – [Buyer/Seller] – [Year]**.
2. **Interview me** to build a **Client Profile**. Ask me one or two questions at a time, and tell me if something's missing. Cover:
   - Who's involved, and who the **decision maker(s)** are (plus anyone influencing them: parents, a financial advisor)
   - Why they're moving now, and their **timeline** (hard dates vs. flexible)
   - Must-haves vs. nice-to-haves
   - Budget and financing status
   - **Communication preferences:** channel (call/text/email), best times, how much detail they want
   - **Working style:** e.g., wants data and comps vs. wants reassurance; decides fast vs. needs time
   - Key contract dates (once under contract)
   - Open questions

   Record only what the client has told me they need for the transaction. Do not note or infer protected characteristics, and never use personal details to suggest homes or neighborhoods.
3. Whenever I add an email thread, text, or call notes, update the profile. Note what changed and when.
4. Never store Social Security numbers, bank or account numbers, or full financial documents.

Part 2: Client Intake Form

WHEN TO USE Runs automatically after New Client Setup, or any time you ask.

PROMPT · COPY & PASTE

Save this as a skill called **Client Intake Form**. Use it when a new client's profile is set up, or when I ask to send the intake form. Build the Google Form once and reuse it for every client.

1. Write the questions based on the Client Profile sections. Keep it under 10 minutes. Build it as a Google Form. If you can't access Google Forms, give me the questions formatted so I can paste them in.
2. **Each decision maker fills out the form separately.** Include a "Your name" question so responses can be told apart.
3. Draft the message sending the form to each decision maker, in my voice and in their preferred channel. Explain that separate answers help me represent everyone. I'll review before sending.
4. When responses come in, add them to the Client Profile. **Compare the answers from each decision maker** and flag where they differ on timeline, budget, must-haves, or priorities. Suggest how I could bring those differences up with them.

Part 3: Daily Deal Management

WHEN TO USE Two scheduled tasks that keep every active deal moving.

PROMPT · COPY & PASTE

Set up two **scheduled tasks**: an end-of-day review at 6:00pm and a Deal Needs recap at 7:45am, weekdays. Each should work through all of my active client projects.

END OF DAY (6:00PM): COMMUNICATIONS REVIEW

1. Use my computer to open my text messages. Read today's conversations with each active client and add anything new to their project: decisions, questions, documents mentioned, and changes in tone.
2. Use my computer to check my call history. List any calls with active clients today: who, when, and how long.
3. Use my Outlook connection to read today's emails, both received and sent, with each active client and with the other parties on their deal (lender, title, inspector, the other agent). Add anything new to the client's project: decisions, questions, documents attached or requested, deadlines mentioned, and changes in tone. Note any client email that is still waiting on my reply.
4. Read only conversations, calls and emails involving active clients and their deals. Skip everything else.

MORNING (7:45AM): DEAL NEEDS RECAP

1. **Calls from yesterday:** for each client call found in last night's review, ask me what was covered. Ask specific questions based on that client's open items, then update the project with my answers.
2. **Deadlines in the next 7 days** (inspection, financing, appraisal, closing)
3. **Waiting on the client:** what's outstanding and how long it's been
4. **Waiting on others:** lender, title, inspector, the other agent (include anything they promised by email)
5. **Waiting on me:** client emails I haven't answered yet, and how long they've been waiting
6. **Check with me:** items that may already be resolved by phone or in person. Ask me rather than assume.
7. **Draft messages** for each client, in their preferred channel and style (for email, save them as Outlook drafts; never send)

If an essential question has gone unanswered for more than 48 hours (by text or email), or a deadline is within 3 days, recommend a call. Draft the **call agenda**: each decision needed, the options, the deadline, and my recommendation. Format it so I can send it ahead of time.

TIP *The computer has to be on with the desktop app open for the text and call steps.*

Part 4: After-Deal Reflection

WHEN TO USE One week after every closing.

PROMPT · COPY & PASTE

First, create a **Client Reflection** Google Form using the questions below. You'll only do this once. If you can't access Google Forms, give me the questions formatted so I can paste them in. Include a "Your name" question and a question for closing date, so responses from all clients collect in one sheet.

Then save a skill called **After-Deal Reflection**. Use it **1 week after each closing**, and whenever new responses come in.

1. Draft a personal note asking the client to fill out the form, while the experience is fresh. This isn't a review request; I want to learn.
2. When responses come in, compare them against the deal record and summarize what I did well and what to improve.
3. Add the lessons to a **Lessons Learned** file my New Client Setup skill reads for future clients.
4. Every few months, look across all responses and tell me the patterns.

> **What takes you 5 hours takes me 1,**
>
> **and my 1 is 40% better than your 5.**
>
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SECTION

04

Listings & Transactions

From the first showing to the closing table: packets, launch plans, timelines and contract language, done before you would have opened a blank page.

Buyer Tour Setup

WHEN TO USE Save as a task or skill, then just send MLS numbers.

PROMPT · COPY & PASTE

Task: Create a Buyer Tour packet for our buyers every time I provide you with new MLS numbers of scheduled property tours.

Listing Launch Plan

WHEN TO USE The day you sign a new listing.

PROMPT · COPY & PASTE

You are my listing marketing director. Build a complete launch strategy for **[ADDRESS]**. Include photo shoot timing, lockbox drop, yard sign installation, postcard schedule, open house sequence, buyer demographic research, the top objections buyers in this zip code raise, and a social media calendar with captions for the first two weeks.

Closing Timeline Tracker

WHEN TO USE As soon as you have a mutually accepted offer.

PROMPT · COPY & PASTE

Create a detailed closing timeline for a transaction closing on **[DATE]**. The property is **[ADDRESS]**. Include key milestones: option period end, inspection deadline, appraisal ordered/received, title commitment review, loan approval deadline, final walkthrough, and closing day prep. Format it as a checklist with dates.

TIP *Not only do sellers feel taken care of, but so will you. You did not type a word and the checklist is done and ready to be emailed.*

Terms for a Contract: Included Items

WHEN TO USE Contract language to adapt when personal property conveys.

CONTRACT LANGUAGE

INCLUDED ITEMS

"Seller shall convey at no additional cost the following items currently at the property: clothes washer and dryer in the laundry room, kitchen refrigerator, microwave, dishwasher, all window coverings and hardware, all TV wall mounts, all ceiling fans and light fixtures, and all garage door openers and remotes."

CONDITION AT POSSESSION

"All included items shall be in the same working condition at possession as on the date of mutual acceptance, normal wear and tear excepted."

NO SWAPS (THE ONE PEOPLE SKIP)

"No included item shall be removed, replaced, or substituted with an item of lesser quality or value prior to possession."

TIE IT TO THE PHOTOS

"Included items are as shown in the listing photographs dated **[DATE]**, attached and incorporated by reference."

WALKTHROUGH TIMING AND REMEDY

"Buyer's final walkthrough shall occur after Seller has fully vacated. If any included item is missing, damaged, or substituted, funds sufficient to replace it shall be held in escrow at closing until it is replaced or the cost reimbursed."

TIP *That last clause is the whole ballgame. Without it, your only options at the table are sign anyway or blow up your own closing. Be specific. Name the room. Name the item. "All appliances" is an argument waiting to happen.*

"

Strategy used to be exposure. In this market, pricing and positioning is the strategy.

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SECTION

05

Marketing & Lead Generation

Lead with value, sound like yourself, and let AI handle the production. Your first-hand knowledge is the part AI can't replicate.

Re-engage Cold Leads

WHEN TO USE For leads and past contacts who have gone quiet.

PROMPT · COPY & PASTE

Write a personalized cold outreach email as **[AGENT NAME]** from **[BROKERAGE]** in **[CITY]**. Briefly introduce yourself, then lead with value by sharing helpful insights about **[NEIGHBORHOOD/AREA]**, like **[MARKET UPDATE]**, **[LOCAL EVENT]**, or **[COMMUNITY NEWS]**. Keep it conversational and non-salesy, and end with a natural question that encourages a response without directly asking them to buy.

Questions Buyers Keep Asking

WHEN TO USE Before you write any blog, newsletter or neighborhood post.

PROMPT · COPY & PASTE

Interview me about **[NEIGHBORHOOD]**, one question at a time. Ask for specific details from my experience. Wait until I say draft before writing. Use my words and do not invent facts.

TIP *Talk about the streets, the local businesses, and the questions buyers keep asking. Otherwise, you get another paragraph about a "charming neighborhood" that could be anywhere.*

Advanced Voice Mode

WHEN TO USE Turn a 10-minute conversation into a month of content.

PROMPT · COPY & PASTE

Interview me with 7–10 questions about the **[CITY OR NEIGHBORHOOD]** market, one at a time. Then turn my answers into marketing: **[BLOG POST, SOCIAL POSTS, NEWSLETTER]**.

TIP *Use AI as a thought partner, not thought leader. Know where the line is. Do not blur it.*

Bulk Create in Canva

WHEN TO USE Market update posts for every community, every month.

HOW TO

1. Create a design template.
2. Create "fields" such as City, Number Sold and Sales Price.
3. Have AI fill the spreadsheet.
4. Upload it to Canva Bulk Create.
5. Create the series monthly. Every city post is created for you.

TIP *Works for client flyers too, like a "You're Invited" for every neighborhood.*

Client Appreciation Event

WHEN TO USE Whenever you are planning a client event.

PROMPT · COPY & PASTE

Create a skill called **Client Appreciation Event**. Use it whenever I'm planning a client event. Draft everything for my approval; don't send or post anything without my OK.

1. **Interview me for the basics.** Ask one or two questions at a time: purpose and theme; date, time and venue (with a weather backup if it's outdoors); budget; capacity; whether kids, pets or plus-ones are welcome; food and drinks; and any co-sponsors.
2. **Build the guest list.** Pull past clients and my sphere from my CRM. Sort them into three groups: VIPs who get a personal call or text from me, clients who get the video invite by email or text, and everyone else, who sees the Facebook post. Show me the list before anyone is invited.
3. **RSVP form and sheet.** Create a Google Form that feeds a Google Sheet. Ask for: name, email, phone, number of adults and kids, dietary needs, and "Would you like to bring a friend?" Set the RSVP deadline to fit the caterer's headcount deadline. If we hit capacity, start a waitlist.
4. **Video invite script.** Write a 30–45 second script in my voice: open with a thank-you, then cover what, when and where, why I'm hosting it, and how to RSVP. Also write the caption to post with it, and remind me to turn on captions.
5. **Facebook image and post.** Design the event graphic: event name, date, time, location, and an RSVP link or QR code. Follow my brokerage's brand standards. Write the post caption. Don't use client names or photos without permission.
6. **Reminder schedule.** Create events on my calendar for each step, and draft the message for each in every guest's preferred channel:
   - Invites go out
   - **[X] days before:** reminder to everyone who RSVP'd
   - **[Y] days before:** final reminder with parking, weather and what to bring

- RSVP deadline: confirm the headcount with the venue and caterer
- **[N] days before the RSVP deadline:** list everyone who hasn't responded, and draft a personal text from me to each

7. **Log RSVPs in my CRM.** As RSVPs come in, record each guest's status, party size and notes, tagged **[Event Name] [Year]**. If my CRM doesn't connect to you, ask whether I'd like an import file or for you to update it through my browser.
8. **Day-of kit.** A run-of-show timeline, a check-in list (for name tags), a setup checklist, 60 seconds of welcome remarks for me, and a photo plan. Ask guests before posting photos of them.
9. **After the event (within 2 days).**
   - Draft a thank-you to attendees, with a photo if they agreed, and a "we missed you" note to anyone who RSVP'd but didn't come.
   - Ask me who mentioned a move, a referral, or a life change. Update their CRM records and flag them for follow-up. A new client can go straight into **New Client Setup**.
   - Write a recap: RSVPs vs. attendance, cost per guest, and what to change next time. Add it to my **Lessons Learned** file.

> **AI will give information.**
>
> **You are the storytellers, the historians.**
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SECTION

06

Being Found on AI

Buyers and sellers are asking AI who to call. Three signals decide whether it names you: NAP consistency, authority, and presence.

#1
NAP Consistency
Name, address and phone match everywhere you appear.

#2
Authority
Other websites say you're fabulous: reviews, awards, press.

#3
Presence
Your own contribution to the internet: blogs, posts, community.

Online Profile Consistency Audit

WHEN TO USE Once now, then every few months.

PROMPT · COPY & PASTE

I need you to perform a Real Estate Agent Online Profile Consistency Audit.

The goal is to find every pertinent online reference, profile, directory listing, or business page, identify important missing profiles, and evaluate how complete, accurate, and consistent the agent's information appears across the web.

AGENT INFORMATION TO USE AS THE SOURCE OF TRUTH:

Agent name: **[AGENT NAME]**

Brokerage name: **[BROKERAGE NAME]**

Office location/city: **[CITY, STATE]**

State/license jurisdiction: **[STATE]**

TIP *This will do the audit, find the listings, rank them, point out errors, and suggest how to fix them. Clean up NAP, email, website and broker address.*

Build Authority & Presence

Reviews are AI's favorite signal
Coach the client to mention the city, the property type and the situation. "Ashley helped us sell our 1960s ranch in Royal Oak in 9 days" is gold. "Great agent" is nothing. Respond to every review.

Lock down Google Business Profile
Add past listings as products, post with city names, and use the Q&A section to seed the areas you cover.

Get mentioned
Pitch a quote to your local paper, send a press release on a notable deal or RE/MAX award, join local podcasts, or guest post for a builder or lender.

Give answers a home
Publish a detailed answer to a real question on your own site, then share a piece of it on social with a link back.

> **Blogs used to be a nicety. It's now a necessity.**
>
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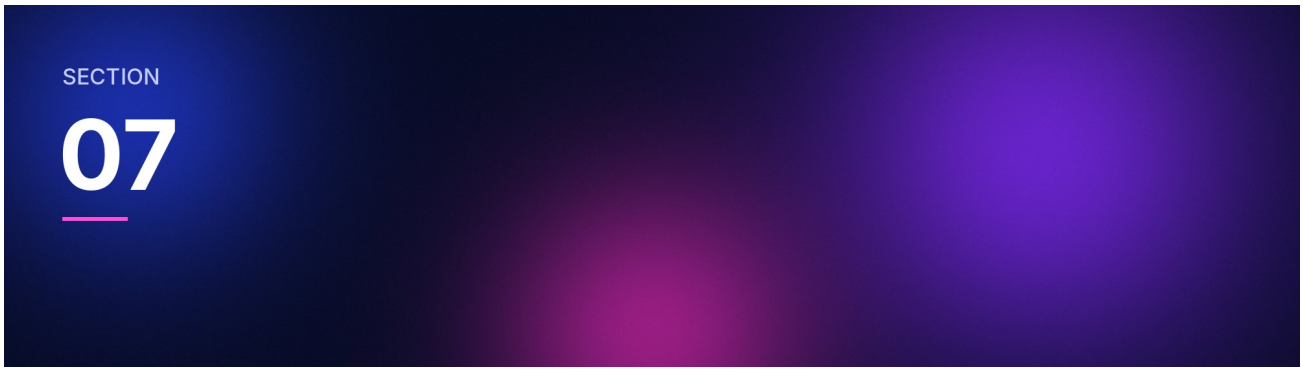

Quick-Start Ideas

More ways to put AI to work this week. Pick one, try it today, and turn the winners into skills.

NEED MORE?

- ☐ Contact enrichment
- ☐ Evaluate multiple offers against what matters most to the seller
- ☐ Pre-listing research packets
- ☐ Add data points to an Excel sheet
- ☐ Have Canva create each post
- ☐ "Watch" a video for you and create a transcript
- ☐ Turn comps into a seller pricing story
- ☐ Break market stats into three talking points
- ☐ Compare two offers side by side
- ☐ Explain why an appraisal came in low
- ☐ Build your open house sign-in follow-up
- ☐ What do you do after you've been ghosted?

A DAY IN THE LIFE

- ☐ Call my 10 people; log notes in Streams
- ☐ Morning briefing of the 10 things I need to get done
- ☐ Check my "needs" on Streams
- ☐ Build a Tour Packet for buyers
- ☐ Talk about a price cut, with data on what sold nearby
- ☐ Send a feedback form after closing
- ☐ Write an "about this deal" post with hyperlocal content
- ☐ Record a listing appointment; have AI suggest improvements
- ☐ Build the perfect offer language for occupancy and terms
- ☐ Create a client project with full context
- ☐ Build a decision summary and agenda before a client call

Don't feel qualified? Nobody does.
Anything new is accomplished by unqualified people.

Automate the ordinary

so you can execute the extraordinary.

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