PARTICIPANT WORKBOOK

P.R.O.V.E.

How I actually use AI to run my business.

MEETINGS. BLOGS. CONTENT. CLIENTS. TEAM. FOLLOW-UP.

AI connects the work we are already doing.

P / PREPARE SMARTER
Research + market intelligence

R / REPURPOSE YOUR VOICE
Content from work we already do

O / ORGANIZE EXECUTION
Meetings + team follow-through

V / VISIBILITY OVER ABILITY
Blogs + search + distribution

E / ENGAGE AUTHENTICALLY
Clients + personal responses

AI is the analyst. I'm still the advisor.

START HERE

Run one workflow this week.

Start with something already on your calendar, in your inbox or in your pipeline.

CHOOSE AN INPUT	CREATE A USEFUL OUTPUT
Meeting notes	A recap with owners, dates and personal follow-ups.
Client question	A clear explanation in your tone, with the facts checked.
Market update	A video script, LO update or partner conversation.
Team discussion	Individual follow-up, handoff notes and the next agenda.

The live workflow I will use:

Who will use the output, and what should happen next?

The input/source I will bring and who will review it:

THE FRAMEWORK

Five ways we put AI to work.

Use P.R.O.V.E. across the business, with human judgment throughout.

P.R.O.V.E.	HOW WE USE IT
P / PREPARE SMARTER	Research + market intelligence. Dated news and client questions become a daily brief, market video script, LO update and partner talking points.
R / REPURPOSE YOUR VOICE	Content from work we already do. One conversation or transcript becomes a video script, caption, YouTube title and description, blog, email and FAQ.
O / ORGANIZE EXECUTION	Meetings + team follow-through. Fireflies notes become executive recaps, action items, personal follow-ups, coaching notes and the next agenda.
V / VISIBILITY OVER ABILITY	Blogs + search + distribution. Turn market and borrower questions into local education. Adapt for the website, Google Business, LinkedIn, Facebook and email.
E / ENGAGE AUTHENTICALLY	Clients + personal responses. Turn the actual client question into a clear, fact-checked response in your tone. Own the advice and the next step.

Where do these uses connect in my business?

P / PREPARE SMARTER

Turn market noise into insight.

One research pass creates multiple conversations.

RESEARCH	TURN IT INTO
Jobs, PCE, Fed and bond news	What happened, why it matters and the mortgage impact.
Consumer question	A short market video with a clear hook.
LO team / Realtor audience	Usable talking points and a relevant partner angle.

PROMPT / WORKFLOW CUE

Dated source + audience + question: ask AI for what happened, why it matters and a clear explanation.

My topic, source and date:

Consumer explanation + LO or partner angle:

What facts must I check before using the output?

R / REPURPOSE YOUR VOICE

One conversation. Many outputs.

Use AI to multiply your voice.

START WITH	CREATE
Video or conversation transcript	Video script, social caption, YouTube title + description.
Reviewed idea or client question	Blog, email, FAQ and partner talking points.
Longer recording	Short-clip ideas and focused excerpts for review.

PROMPT / WORKFLOW CUE

Use my transcript to draft a caption, blog outline and email. Preserve the meaning and my tone.

My original idea, conversation or transcript:

The formats and channels I will create for:

The edits that make this sound like me:

O / ORGANIZE EXECUTION

Do not let conversations die.

Every meeting should produce a decision, follow-up or next action.

AI HELPS PREPARE	OUR ACTUAL WORK
Executive recap + action items	Fireflies notes become decisions, owners and dates.
Personal follow-ups + coaching	Individual LO emails and processor / LO handoffs.
Next agenda + team materials	Unresolved items, SOPs, training and event next steps.

PROMPT / WORKFLOW CUE

From these notes, draft a short recap. Separate commitments from proposed actions. Mark missing details as unconfirmed.

Meeting or team discussion I will use:

Confirmed commitments, owners and due dates:

Follow-up, handoff and next-agenda items:

V / VISIBILITY OVER ABILITY

Show up with useful education.

Blogs + search + distribution make your expertise easier to find.

CONTENT TOPIC	WHERE IT GOES
Rates, Fed expectations and jobs data	Market videos, blogs and team / partner updates.
FHA, HELOCs, buydowns and divorce lending	Borrower education, FAQs and client emails.
Ocean / Monmouth local questions	Website, Google Business, LinkedIn and Facebook.

PROMPT / WORKFLOW CUE

Turn this verified topic into useful local education, then adapt it for the channels I use. Check each published result.

The question my audience is searching for:

My blog / FAQ idea and distribution channels:

Published links or delivery checks I will record:

E / ENGAGE AUTHENTICALLY

From complex to clear.

AI helps explain. You own the advice and relationship.

CLIENT QUESTION	AI-ASSISTED OUTPUT
AUS, guidelines, FHA or credit	Plain-language explanation and missing-fact questions.
2/1 buydown, HELOC or appraisal	Reviewed options, assumptions and client next steps.
Documents, application or follow-up	A personal response grounded in the actual conversation.

PROMPT / WORKFLOW CUE

Explain this to my client in normal language without changing the facts. Keep it clear, compliant and action-oriented.

The actual client question and relevant context:

My clear response and personal next step:

Facts, tone and advice I must review before sending:

THE CONNECTED WORKFLOW

This is how the work connects.

Record. Organize. Think. Create. Review. Distribute. Follow up.

WORKFLOW	ACTUAL SEQUENCE
Meetings	Fireflies, recap, owners and dates, personal follow-ups, next agenda.
Market + content	Research, script, record, blog/social/LO update, conversations.
Client communication	Question and facts, clear explanation, human review, reply and next step.

My input and the useful outputs it can support:

Who reviews, where it goes and who follows up:

What I will record in the KPI tracker:

P.R.O.V.E. SCORECARD

Track useful work and follow-through.

Use the matching Excel tracker. Record actual activity; leave unknowns blank.

MEASURE	WHAT TO COUNT
P / Prepare smarter	Reviewed research briefs that were used.
R / Repurpose your voice	Distinct content assets created from an existing input.
O / Organize execution	Meeting / team follow-up actions completed.
V / Visibility over ability	Published placements confirmed on each channel.
E / Engage authentically	Personalized client / partner responses sent.
Time + reliability	Net hours recovered and weekly on-time follow-through.

REVIEW BEFORE RELEASE

[ ] Facts and sources checked

[ ] My voice and the client context preserved

[ ] Owner and next action clear

[ ] Publication, send or completion confirmed

[ ] Useful conversations and outcomes recorded

What helped, what needs improvement and what I will repeat:

7-DAY ACTION PLAN

Put the framework into practice.

Choose one live workflow. Complete useful work this week.

DAY	COMMITMENT
1	Choose a live input, audience and useful output.
2 / P	Prepare smarter: research the facts and create a brief.
3 / R	Repurpose your voice: adapt the input into useful content.
4 / O	Organize execution: owners, dates, follow-ups and handoffs.
5 / V	Visibility over ability: publish education and check delivery.
6 / E	Engage authentically: review and send a personal response.
7	Review activity, time and conversations. Choose what to repeat.

One action + owner + due date:

My measure and evidence:

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