

THE MOMENTUM SERIES · POWERED BY GOT MORTGAGES

The **BUILDERS** Workbook

NAHREP Central New Jersey · Real Estate Agent Edition
Expanded AI Operating System, tools, workflows, prompts, and implementation labs.

B U I L D E R S

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“AI is not the strategy. AI supports the strategy. Relationships, judgment, service, and execution are still the strategy.”

HOW TO USE THIS WORKBOOK

Nine sessions. One operating system.

This version is intentionally practical. Every BUILDERS session includes the business concept, an agent exercise, the actual AI tools that can support it, a Got Mortgages operating insight, a copy/paste prompt, and a worksheet. The goal is not to leave with more AI knowledge. The goal is to leave with a business that loses less opportunity to memory and manual work.

Step	What you do
READ	Understand the business idea before choosing a tool.
RUN	Do the in-room exercise using your real calendar, pipeline, database, calls, and processes.
WIRE	Connect AI to the process only after the process is clear.
REVIEW	Human-review anything involving pricing, legal/fiduciary judgment, Fair Housing, confidential data, or client promises.
SHIP	Nothing counts until the SOP, automation, scorecard, or content system is actually live.

THE CORE RULE

Do not automate confusion. Fix the process first. Then let AI and automation carry the repeatable parts.

Chaos TO Clarity TO Consistency TO Scale

How we actually think about AI.

At Got Mortgages, AI works best as a layer across the business - not as a separate project. We capture what is already happening, structure it, route it, create from it, and measure whether it improved execution.

Layer	Actual tools	What the layer does
1. CAPTURE	Fireflies · Plaud · forms · calls · voice notes	Turns meetings, client questions, partner conversations, and walkthroughs into usable text/data.
2. THINK	ChatGPT · Claude · custom GPTs / Projects	Summarizes, organizes, drafts, coaches, scores, compares, and converts raw information into a useful format.
3. ROUTE	Zapier · CRM / GoHighLevel · Gmail	Moves the right information to the right person/system without depending on memory.
4. STORE	Google Drive · CRM · project board	Keeps SOPs, templates, notes, approved resources, follow-up history, and knowledge accessible.
5. CREATE	ChatGPT/Claude · Canva · Gamma · Buffer	Turns expertise into scripts, emails, posts, visuals, decks, FAQs, and follow-up resources.
6. DELIVER	CRM · Gmail · Calendly · social channels	Gets approved communication, reminders, content, and appointment paths in front of the right audience.
7. MEASURE	Scorecards · dashboards · custom call grader	Shows what moved, what stalled, and where coaching or a human decision is needed.

THE BIG INSIGHT	WHAT STAYS HUMAN
The power is in the connections . A transcript that only becomes a summary saves minutes. A transcript that becomes CRM notes, tasks, follow-up, coaching, and content can change the operating system.	Negotiation, pricing/fiduciary judgment, emotional conversations, relationship building, local interpretation, Fair Housing decisions, and final approval of anything sent under your name.

Eight ways AI becomes real work.

Workflow	Input	AI / automation output	Human moment
Client / buyer consult	Meeting or voice note	Recap, priorities, action items, lender/attorney intro drafts, next-step checklist	Agent confirms strategy and relationship.
Partner meeting	Fireflies/Plaud transcript	CRM notes, mutual goals, commitments, collaboration ideas, follow-up email	Agent delivers value and maintains trust.
One client question	Question / call transcript	Reel, caption, email, blog, FAQ, carousel, GBP post	Agent supplies opinion, context, proof.
Open house lead	Form / QR / sign-in	CRM stage, instant response, follow-up task, nurture path, hot/warm/cold draft segmentation	Agent calls and converts.
Listing launch	Signed listing + agent notes	Checklist, feature copy drafts, social/email assets, calendar tasks, seller-update cadence	Agent verifies facts, positioning, pricing, compliance.
Sales call	Transcript/audio where permitted	Call grade: listening, empathy, questions, interruptions, objections, next step	Agent practices and improves.
Team meeting	Transcript	Decisions, owners, due dates, scorecard, unanswered questions	Leader coaches and makes decisions.
Weekly business review	CRM + calendar + scorecard	Leadership brief, risks, stale items, top 3 decisions	Owner prioritizes and executes.

THE TEST

Ask of every AI idea: **Does this create a faster response, clearer client experience, better follow-up, stronger brand, better coaching, or fewer dropped handoffs?** If not, it may be interesting but it is not leverage.

The nine BUILDERS sessions.

The framework moves from clarity to execution to ownership to scale. Every session has an AI layer, but the business decision always comes first.

Letter	Session	Business move
B	Build the Agent Blueprint	Audit the business before you automate it.
U	Unlock Action	Execution beats a folder full of ideas.
I	Identify Your Edge	AI should expand your edge, not erase it.
L	Lead Like an Owner	Use AI to prepare decisions, not make fiduciary decisions for you.
D	Distinguish the Brand	AI can multiply content. Only you can supply the point of view.
E	Energy + Accountability	Visibility is not surveillance. Measure the work, protect the human.
R	Replace Yourself Through Systems	Automate the repeatable. Keep judgment and relationships human.
S	Smart Partnerships + Hiring	Use AI to prepare better conversations and make more consistent decisions.
S	Scale Without You	A scalable business has a rhythm, a dashboard, and a backup plan.

B · Build the Agent Blueprint

Audit the business before you automate it.

THE CORE IDEA

Your first AI advantage is not a chatbot. It is clarity. Map how leads enter, how appointments are created, where clients get stuck, which activities produce closings, and which work is consuming your best hours. AI can help classify the work, but you decide what matters.

RUN THE SESSION	ACTUAL AI TOOLS
1. Export or recreate the last 30 days of your calendar. Tag each block: prospecting, appointments, showings, listings, negotiation, client service, admin, content, travel, personal. 2. List every lead source and count: leads, conversations, appointments, signed clients, closings. 3. Circle the 3-5 activities that create the most pipeline. Protect those first. 4. List the 10 recurring tasks you hate, delay, or repeat. Mark each Automate, Delegate, Delete, or Keep Human. 5. Choose one workflow to rebuild before adding more tools.	• ChatGPT / Claude: calendar audit, process mapping, role triage, SOP draft. • Google Calendar: source of truth for where time actually goes. • CRM / GoHighLevel: lead source, stage, last contact, next step. • Zapier: routes events/forms/leads only after the process is clear. • Google Drive: stores the approved SOP and templates.

GOT MORTGAGES OPERATING INSIGHT

At Got Mortgages, we use AI around real conversations and real operations instead of inventing work for it. A calendar, meeting transcript, call, client question, or team process becomes structured data that AI can summarize, organize, score, or turn into an SOP. The insight: **AI becomes useful when you feed it work you are already doing.**

WORKSHEET

Write it down	Your answer
My revenue-driving 20% is...	
The workflow leaking the most opportunity is...	
The first task leaving my plate is...	
The metric that proves this worked is...	

Build the Agent Blueprint: make it real.

COPY / PASTE PROMPT

Here is my last 30 days of calendar activity and this month's pipeline. Classify every activity as \$20/hr, \$100/hr, or \$1,000/hr work for a real estate agent. Then tell me: (1) the five activities to protect, (2) the five to automate/delegate/delete, (3) the three workflows I should systematize first. Do not make up production data.

OUTPUT: Edit the prompt with your real data, transcript, market, audience, and process before running it.

What to bring	What AI does	What you decide
Calendar export / list	Classifies activities and finds repeated patterns	What is truly high-value for your model.
CRM lead-source report	Organizes conversion by source/stage	Which sources deserve more time/budget.
Task dump	Groups Automate / Delegate / Delete / Keep	What must stay human.

GOOD AI INPUT

Your own transcript, real CRM data, approved templates, your voice, your local market, explicit constraints, and a clear desired output.

BAD AI INPUT

“Write me something good.” No context, no source data, no audience, no facts, no review standard, and no definition of what the output should accomplish.

IMPLEMENTATION CHECK

Before you move on, you should have one of these live: an SOP, prompt, scorecard, workflow map, automation, content engine, call-coaching habit, or dashboard. If you only have notes, repeat the session.

U - Unlock Action

Execution beats a folder full of ideas.

THE CORE IDEA

Agents often leave an AI class with 40 prompts and no operating change. The goal is to ship one working system: one SOP, one automation, one scheduled review rhythm, and one measurable result.

RUN THE SESSION	ACTUAL AI TOOLS
1. Pick one workflow you can complete in 60 minutes: open-house follow-up, buyer consult recap, listing launch checklist, referral-partner recap, or review request. 2. Record yourself explaining the process as a voice note or screen recording. 3. Turn the transcript into a written SOP with Trigger, Process, Outcome, owner, and service standard. 4. Put a weekly 60-minute CEO Hour on your calendar. 5. Create a 30-day scorecard with no more than 5 controllable numbers.	• Plaud / Fireflies: capture the explanation or meeting. • ChatGPT / Claude: convert transcript to SOP, checklist, scripts, and follow-up. • Zapier: create the handoff only after the SOP is approved. • Google Calendar / Tasks: protect the CEO Hour and accountability cadence. • Trello / Asana / ClickUp: optional execution board for owners and due dates.

GOT MORTGAGES OPERATING INSIGHT

Our implementation style is “capture once, deploy many.” One recorded walkthrough can become the SOP, quick-reference checklist, training outline, role handoff, and quality-control list. That is faster than asking a team member to write process documentation from scratch.

WORKSHEET

Write it down	Your answer
The SOP I ship today is...	
The automation I connect after the SOP is approved is...	
My CEO Hour is...	
My 30-day accountability number is...	

Unlock Action: make it real.

COPY / PASTE PROMPT

Turn this transcript into a real estate SOP. Use this structure: Trigger, Purpose, Owner, Inputs Needed, Step-by-Step Process, Client Service Standard, What Can Be Automated, What Must Stay Human, Quality-Control Checklist, Escalation Rule, and Done Definition. Keep it simple enough for a new hire to use on day one.

OUTPUT: Edit the prompt with your real data, transcript, market, audience, and process before running it.

Capture	AI conversion	Ship
5-minute process voice note	SOP + checklist + training outline	One approved process document.
One recurring task	Automation design	One tested automation.
Quarter goals	CEO-Hour agenda	Calendar block + weekly review.

GOOD AI INPUT	BAD AI INPUT
Your own transcript, real CRM data, approved templates, your voice, your local market, explicit constraints, and a clear desired output.	"Write me something good." No context, no source data, no audience, no facts, no review standard, and no definition of what the output should accomplish.

IMPLEMENTATION CHECK

Before you move on, you should have one of these live: an SOP, prompt, scorecard, workflow map, automation, content engine, call-coaching habit, or dashboard. If you only have notes, repeat the session.

I • Identify Your Edge

AI should expand your edge, not erase it.

THE CORE IDEA

The highest-value agent work is deeply human: trust, diagnosis, persuasion, negotiation, interpretation, local judgment, and emotional steadiness. AI should remove the preparation and administrative drag around those moments so you can show up better inside them.

RUN THE SESSION

1. Create an Only-Me / Assist-Me / Automate / Delegate map.
2. Put pricing strategy, fiduciary judgment, negotiation, emotional client conversations, and relationship calls in the human lane.
3. Put prep, research summaries, first drafts, checklists, reminders, transcription, data cleanup, and routing in the assist/automate lane.
4. Choose one task you keep taking back and define the outcome instead of the keystrokes.
5. Write your one-sentence edge: "Clients need me for ____ because ____."

ACTUAL AI TOOLS

- ChatGPT / Claude: prep, research organization, decision matrices, scripts.
- Custom GPT / Project: keeps your brand voice, FAQs, SOPs, and process instructions together.
- CRM: remembers dates, stages, next steps, and segmentation.
- AI Call Grader: coaches how you communicate without replacing the conversation.

GOT MORTGAGES OPERATING INSIGHT

We use AI as a call coach: conversations can be graded for talk/listen ratio, question quality, interruptions, empathy, objection handling, clarity, and whether a clear next step was earned. The point is not to turn the human into a robot. It is to make the human more aware of the habits they cannot hear while they are in the conversation.

WORKSHEET

Write it down	Your answer
Only I should...	
AI should assist me with...	
The first outcome I delegate is...	
The communication habit I want AI to coach is...	

Identify Your Edge: make it real.

COPY / PASTE PROMPT

I am a real estate agent. Review this call transcript as a sales coach. Score me 1-10 on talk/listen balance, discovery questions, empathy, clarity, objection handling, confidence, interruptions, and closing for a next step. Quote only short examples from my transcript. Give me 3 behaviors to repeat and 3 to change on the next call.

OUTPUT: Edit the prompt with your real data, transcript, market, audience, and process before running it.

Human edge	AI assist	Never outsource blindly
Discovery / diagnosis	Question prep + recap	Client needs and fiduciary judgment.
Negotiation	Scenario prep + talking points	Actual negotiation and promises.
Relationship	Reminder + context	Authentic personal contact.

GOOD AI INPUT	BAD AI INPUT
Your own transcript, real CRM data, approved templates, your voice, your local market, explicit constraints, and a clear desired output.	“Write me something good.” No context, no source data, no audience, no facts, no review standard, and no definition of what the output should accomplish.

IMPLEMENTATION CHECK

Before you move on, you should have one of these live: an SOP, prompt, scorecard, workflow map, automation, content engine, call-coaching habit, or dashboard. If you only have notes, repeat the session.

L · Lead Like an Owner

Use AI to prepare decisions, not make fiduciary decisions for you.

THE CORE IDEA

Owner thinking means you stop reacting to every notification and start running the business from a rhythm: CEO Hour, weekly pipeline review, lead-source review, content plan, partner plan, and a stop-doing list.

RUN THE SESSION	ACTUAL AI TOOLS
1. Calculate your target annual income divided by realistic working hours. 2. Audit every recurring task below that hourly impact. 3. Build a weekly CEO brief with pipeline, appointments, lead sources, active listings/buyers, follow-up gaps, and the three decisions you need to make. 4. Set one rule for what requires you versus what the system/team can decide. 5. Review the prior week before you build the next one.	• ChatGPT / Claude: CEO brief, decision memo, second-order effects, weekly review. • CRM + spreadsheet/dashboard: actual numbers, not guessed numbers. • Google Calendar: protected CEO block. • Custom GPT: runs the same weekly review questions consistently.

GOT MORTGAGES OPERATING INSIGHT

A strong use of AI is to turn messy information into a decision brief: what changed, what stalled, what needs a human decision, what can be delegated, and what should be ignored. The insight is **AI is often more valuable as a compression layer than as a creation tool.**

WORKSHEET

Write it down	Your answer
My hourly impact rate is...	
The operator habit I drop is...	
The owner rhythm replacing it is...	
My three CEO decisions this week are...	

Lead Like an Owner: make it real.

COPY / PASTE PROMPT

Act as my real estate CEO-Hour analyst. I will give you my weekly CRM/pipeline numbers, calendar, lead-source activity, active listings, active buyers, and open tasks. Summarize: what moved, what stalled, the 3 biggest risks, the 3 highest-leverage opportunities, what I should stop doing, and the 3 decisions I must make this week. Do not invent missing data.

OUTPUT: Edit the prompt with your real data, transcript, market, audience, and process before running it.

Owner rhythm	AI contribution	Output
Weekly CEO Hour	Leadership brief	3 decisions.
Lead-source review	Trend summary	Budget/time shift.
Stop-doing review	Task-value filter	Delegation queue.

GOOD AI INPUT	BAD AI INPUT
Your own transcript, real CRM data, approved templates, your voice, your local market, explicit constraints, and a clear desired output.	"Write me something good." No context, no source data, no audience, no facts, no review standard, and no definition of what the output should accomplish.

IMPLEMENTATION CHECK

Before you move on, you should have one of these live: an SOP, prompt, scorecard, workflow map, automation, content engine, call-coaching habit, or dashboard. If you only have notes, repeat the session.

D - Distinguish the Brand

AI can multiply content. Only you can supply the point of view.

THE CORE IDEA

For an agent, brand is local trust at scale. The fastest way to sound generic is to ask AI to “write a post” without giving it your stories, market, audience, proof, language, and beliefs. Build a Brand OS first, then let AI repurpose your real expertise.

RUN THE SESSION	ACTUAL AI TOOLS
1. Define your audience, promise, beliefs, proof, stories, words you use, words you never use, and local markets you serve. 2. Collect 10 real client questions and 10 objections. 3. Choose one weekly anchor: market update, client question, listing story, partner conversation, community insight, or podcast. 4. Turn one anchor into 7 assets instead of creating 7 unrelated ideas. 5. Track replies, DMs, calls, saves, shares, and referral conversations, not vanity likes alone.	• ChatGPT / Claude: hooks, scripts, captions, blogs, FAQs, carousel outlines, email drafts. • AnswerThePublic: real questions people search. • Canva: branded graphics and video assets. • Buffer: schedule approved content. • Google Drive: brand voice, content bank, raw transcripts, proof assets. • Gamma: fast deck/visual draft when a presentation is needed.

GOT MORTGAGES OPERATING INSIGHT

Our content system starts with what is already happening: client questions, realtor objections, market changes, workshops, podcasts, team training, and partner conversations. One question can become a Reel, LinkedIn post, email, blog, FAQ, carousel, and Google Business post. **One source. Many outputs. Same voice.**

WORKSHEET

Write it down	Your answer
I want my market to remember me for...	
My three content pillars are...	
My weekly anchor content is...	
The proof asset I need more of is...	

Distinguish the Brand: make it real.

COPY / PASTE PROMPT

Use this real conversation/transcript as the source. First pull the 5 strongest educational ideas. Then turn the best idea into: a 45-second Reel script, LinkedIn post, Instagram caption, 5-slide carousel outline, client email, SEO-friendly blog title + outline, and a Google Business post. Keep my voice conversational, local, practical, and confident. Do not invent facts or testimonials.

OUTPUT: Edit the prompt with your real data, transcript, market, audience, and process before running it.

Source	Repurpose	Distribution
Client question	7 content assets	IG · FB · LinkedIn · email · blog · GBP.
Partner interview	Credibility clips + follow-up	Partner and local audience.
Market update	Script + FAQ + carousel	Educational, fact-checked local content.

GOOD AI INPUT	BAD AI INPUT
Your own transcript, real CRM data, approved templates, your voice, your local market, explicit constraints, and a clear desired output.	"Write me something good." No context, no source data, no audience, no facts, no review standard, and no definition of what the output should accomplish.

IMPLEMENTATION CHECK

Before you move on, you should have one of these live: an SOP, prompt, scorecard, workflow map, automation, content engine, call-coaching habit, or dashboard. If you only have notes, repeat the session.

E · Energy + Accountability

Visibility is not surveillance. Measure the work, protect the human.

THE CORE IDEA

AI can create accountability without adding another meeting. Capture commitments, assign owners, summarize scorecards, and surface what is late. The system should reduce mental load, not create constant digital pressure.

RUN THE SESSION	ACTUAL AI TOOLS
1. Choose 3-5 controllable weekly numbers: conversations, follow-ups, appointments, signed clients, CMAs, referral asks, content pieces, reviews. 2. Create a weekly scorecard with owner, target, actual, trend, next action. 3. Record team or partner meetings and extract action items. 4. Install a daily "three wins" ritual and a Friday review. 5. Schedule recovery and family/personal blocks with the same respect as appointments.	• Fireflies: transcripts, summaries, action items, searchable meeting history. • Plaud: portable capture for conversations/voice notes when appropriate. • ChatGPT / Claude: turn meeting text into scorecards and coaching notes. • Zapier: route assigned action items to tasks/CRM. • Dashboard/Sheet: show trends at a glance.

GOT MORTGAGES OPERATING INSIGHT

Meeting AI is not valuable because it creates a summary. It is valuable when the summary becomes action: owner, due date, next step, CRM note, follow-up draft, and accountability. If nothing changes after the transcript, you created a digital filing cabinet - not leverage.

WORKSHEET

Write it down	Your answer
My controllable weekly numbers are...	
My scorecard review happens...	
The meeting I will capture and route is...	
The accountability habit I keep for 30 days is...	

Energy + Accountability: make it real.

COPY / PASTE PROMPT

From this meeting transcript, extract every decision, action item, owner, due date, question left unanswered, client/partner follow-up, and risk. Then create a one-page scorecard with Red/Yellow/Green status. Flag anything with no owner or no due date.

OUTPUT: Edit the prompt with your real data, transcript, market, audience, and process before running it.

Capture	AI action	Accountability
Team meeting	Actions + owners + dates	Weekly scorecard.
Daily 3 wins	Rollup	Momentum / coaching.
Call transcript	Behavior grade	One behavior to practice next.

GOOD AI INPUT

Your own transcript, real CRM data, approved templates, your voice, your local market, explicit constraints, and a clear desired output.

BAD AI INPUT

“Write me something good.” No context, no source data, no audience, no facts, no review standard, and no definition of what the output should accomplish.

IMPLEMENTATION CHECK

Before you move on, you should have one of these live: an SOP, prompt, scorecard, workflow map, automation, content engine, call-coaching habit, or dashboard. If you only have notes, repeat the session.

R · Replace Yourself Through Systems

Automate the repeatable. Keep judgment and relationships human.

THE CORE IDEA

This is where AI, CRM, and automation become an operating system. The goal is not to send more robotic messages. The goal is to make sure no lead, client, partner, document, deadline, or follow-up depends on memory.

RUN THE SESSION	ACTUAL AI TOOLS
1. Pick one high-volume workflow: open house, internet lead, buyer consult, seller consult, listing launch, under-contract communication, closing, annual review. 2. Write the Trigger, Process, Outcome and service standard. 3. Identify the data fields the automation needs. 4. Create the human escalation rules. 5. Test with yourself before turning it on for the whole database.	• CRM / GoHighLevel: stage, tags, pipeline, nurture, tasks, database. • Zapier: connects forms, CRM, Gmail, Drive, calendars, and task boards. • Calendly: appointment booking and reminders. • Gmail: templated/assisted communications with human review. • Google Drive: auto-created folders, SOPs, templates, resources. • ChatGPT / Claude: message drafts, personalization logic, summaries.

GOT MORTGAGES OPERATING INSIGHT

Our operating model connects conversations and workflow data back to the team, CRM, consumer, and partner. The real win is not the “zap.” The win is reducing dropped handoffs. A good automation answers four questions: **What triggers it? What data does it need? What action happens? When does a human take over?**

WORKSHEET

Write it down	Your answer
The workflow I systematize first is...	
Its trigger is...	
The part I automate is...	
The human escalation rule is...	

Replace Yourself Through Systems: make it real.

COPY / PASTE PROMPT

Design a real estate automation for this workflow: [insert workflow]. Give me: trigger, required fields, each automation action, CRM stage/tag changes, internal task, client-facing message drafts, partner-facing message drafts, timing, stop conditions, human escalation rules, failure alerts, and a test checklist. Keep Fair Housing and privacy considerations in mind.

OUTPUT: Edit the prompt with your real data, transcript, market, audience, and process before running it.

Workflow	Automate	Keep human
New lead	Routing, confirmation, task, nurture	Discovery / conversion call.
Open house	CRM entry, follow-up sequence, reminder	Personal high-intent follow-up.
Listing launch	Checklist, tasks, draft assets	Facts, pricing, strategy, seller communication.

GOOD AI INPUT	BAD AI INPUT
Your own transcript, real CRM data, approved templates, your voice, your local market, explicit constraints, and a clear desired output.	"Write me something good." No context, no source data, no audience, no facts, no review standard, and no definition of what the output should accomplish.

IMPLEMENTATION CHECK

Before you move on, you should have one of these live: an SOP, prompt, scorecard, workflow map, automation, content engine, call-coaching habit, or dashboard. If you only have notes, repeat the session.

S - Smart Partnerships + Hiring

Use AI to prepare better conversations and make more consistent decisions.

THE CORE IDEA

Agents scale through people: clients, referral partners, assistants, transaction coordinators, showing agents, photographers, attorneys, lenders, title, and future hires. AI can organize partner intelligence and hiring decisions, but trust and accountability remain human.

RUN THE SESSION	ACTUAL AI TOOLS
1. Create a partner map: who sends business, who receives business, who creates expertise, who expands reach. 2. After each partner meeting, record the goal, mutual opportunities, promises made, next touch, and content/collaboration ideas. 3. Before hiring, define three 90-day outcomes and five scorecard traits. 4. Use the same interview scorecard for every candidate. 5. Measure follow-through after the meeting/interview, not charisma in the room.	• Fireflies / Plaud: capture partner and interview conversations. • ChatGPT / Claude: recap, partner brief, collaboration ideas, interview scoring. • CRM: partner category, last touch, next touch, referral history. • Google Drive: approved role scorecards and partner plans. • Calendly: easier booking with partners/candidates.

GOT MORTGAGES OPERATING INSIGHT

We use meeting intelligence to avoid “great meeting, no follow-up.” A transcript can produce the recap email, mutual action list, next meeting date, CRM notes, content opportunities, and a partner-specific value plan. The same discipline applies to hiring: define the outcome first, then let AI help summarize evidence against the scorecard.

WORKSHEET

Write it down	Your answer
My highest-value partner category is...	
The partner follow-up I need to systematize is...	
The next role I may need is...	
The 90-day outcome that role must own is...	

Smart Partnerships + Hiring: make it real.

COPY / PASTE PROMPT

Review this partner-meeting transcript. Give me: their top goals, pain points, opportunities where I can help, opportunities where they can help me, 3 collaboration ideas, commitments each person made, a warm follow-up email, CRM notes, and the next-touch plan. Do not overstate anything that was not actually discussed.

OUTPUT: Edit the prompt with your real data, transcript, market, audience, and process before running it.

People system	AI contribution	Human decision
Partner meeting	Recap + value plan + next touch	Relationship and commitment.
Hiring interview	Evidence summary vs scorecard	Final hiring decision.
Role design	Job description + 90-day outcomes	Culture fit and leadership.

GOOD AI INPUT	BAD AI INPUT
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IMPLEMENTATION CHECK

Before you move on, you should have one of these live: an SOP, prompt, scorecard, workflow map, automation, content engine, call-coaching habit, or dashboard. If you only have notes, repeat the session.

S · Scale Without You

A scalable business has a rhythm, a dashboard, and a backup plan.

THE CORE IDEA

Scale is not “more leads.” It is repeatable results without everything requiring your memory, inbox, or immediate presence. You need a simple command center that shows what needs attention, what is on track, and where a human decision is required.

RUN THE SESSION	ACTUAL AI TOOLS
1. Choose four core KPIs and four controllable leading indicators. 2. Build weekly, monthly, and quarterly leadership rhythms. 3. Create early-warning thresholds: follow-up aging, lead response, appointment conversion, listing activity, transaction risk, partner inactivity. 4. Name the backup owner for each critical responsibility. 5. Run a 7-day step-away test before a 30-day test.	• Dashboard + spreadsheet / CRM: current metrics and trends. • Lovable + Supabase: custom command-center concept for teams that want their own app layer. • ChatGPT / Claude: weekly leadership brief and risk summary. • Zapier: early-warning notifications when defined conditions occur. • Custom GPT: consistent weekly review questions and SOP lookup.

GOT MORTGAGES OPERATING INSIGHT

The goal of a command center is not more dashboards. It is fewer surprises. We use AI best when it surfaces exceptions: the warm lead with no next step, the partner who went quiet, the task without an owner, the meeting promise with no due date, the metric that dropped before it becomes a crisis.

WORKSHEET

Write it down	Your answer
My four KPIs are...	
My early-warning thresholds are...	
My backup owner is...	
My 7-day step-away test date is...	

Scale Without You: make it real.

COPY / PASTE PROMPT

Using only the data I provide, create my weekly real estate leadership brief. Show: 4 KPI results, 4 leading indicators, week-over-week movement, any metric outside threshold, pipeline risks, stale follow-ups, partner inactivity, and the 3 actions that need a human decision. End with a one-sentence “What matters most this week?” summary.

OUTPUT: Edit the prompt with your real data, transcript, market, audience, and process before running it.

Command center	AI contribution	Human decision
KPIs	Trend + threshold alerts	What action to take.
Pipeline	Stale item detection	Which clients need personal attention.
Partner database	Inactivity alerts	Who to reconnect with and why.

GOOD AI INPUT	BAD AI INPUT
Your own transcript, real CRM data, approved templates, your voice, your local market, explicit constraints, and a clear desired output.	“Write me something good.” No context, no source data, no audience, no facts, no review standard, and no definition of what the output should accomplish.

IMPLEMENTATION CHECK

Before you move on, you should have one of these live: an SOP, prompt, scorecard, workflow map, automation, content engine, call-coaching habit, or dashboard. If you only have notes, repeat the session.

The actual AI leverage stack.

Use one tool per job. Avoid stacking five tools that all do the same thing. Start with the job you are solving, then choose the tool.

Tool	Job	Real agent use	Got Mortgages-style insight
ChatGPT	Thinking, drafting, projects, custom GPTs	Scripts, email drafts, SOPs, content repurposing, decision briefs	Best when grounded in your real source material and reusable instructions.
Claude	Long-form analysis, writing, document work	Transcript/SOP analysis, role briefs, process mapping	Useful as a second thinking/writing engine; compare outputs when stakes matter.
Fireflies	Meeting capture + transcript intelligence	Buyer/seller/partner/team meetings, action items	The summary is step one; route actions and next steps afterward.
Plaud	Portable voice/meeting capture	Voice notes, in-person debriefs, process walkthroughs	Capture expertise before it disappears. Use with consent and policy awareness.
Zapier	Automation + routing	Forms→CRM, CRM→tasks, Gmail→Drive, calendar→follow-up	Automate handoffs, not judgment. Add failure alerts.
GoHighLevel / CRM	Pipeline + nurture + database	Stages, tags, tasks, next steps, drip/nurture	Clean fields and clear stages are prerequisites for good AI.
Google Drive	Knowledge + templates	SOP library, content bank, client resources, folders	One approved source of truth prevents AI from learning from random versions.
Canva	Branded creative	Listings, market graphics, educational posts, event assets	AI drafts; brand standards keep output recognizable.
Buffer	Distribution	Schedule approved posts consistently	Automation should support consistency, not spam.
Gamma	Fast visual draft	Workshop recaps, mini-decks, educational resources	Good for first drafts; review brand and factual accuracy.
Calendly	Booking + reminders	Buyer consults, seller consults, partner meetings	Reduce back-and-forth and connect booking to follow-up.
AnswerThePublic	Search-question research	Local buyer/seller FAQ and content topics	Stop guessing what people ask; turn real questions into useful content.
Lovable + Supabase	Custom app/dashboard layer	Team command center, KPI alerts, internal tools	Worth it after the underlying process/data is stable.
Custom AI Call Grader	Coaching	Talk/listen, empathy, questions, objections, next step	Coach the behavior, not just the outcome.

Stop collecting prompts. Build prompt architecture.

A reusable prompt is a mini operating procedure. The stronger the context and constraints, the more repeatable the output.

Part	What to include	Real estate example
ROLE	Who AI should act like	"Act as a real estate operations coach."
SOURCE	What it may use	"Use only this transcript + CRM export."
CONTEXT	Audience / market / business model	"Central New Jersey, referral-driven agent."
TASK	What to do	"Create recap + tasks + follow-up."
CONSTRAINTS	What not to do	"Do not invent pricing, facts, testimonials, or legal advice."
OUTPUT	Exact format	"Table with owner, due date, status; then email draft."
QUALITY CHECK	How to self-review	"Flag missing data and statements that need human verification."

MASTER PROMPT TEMPLATE

Act as [ROLE]. Use only [SOURCE]. Context: [BUSINESS / AUDIENCE / MARKET]. Your task is [TASK]. Follow these constraints: [CONSTRAINTS]. Return the result as [OUTPUT FORMAT]. Before finalizing, flag anything that requires human verification, missing data, Fair Housing/legal review, or a personal relationship decision.

INSIGHT

The prompt library should live with your approved knowledge: brand voice, SOPs, audience, FAQs, service standards, and examples. This is why ChatGPT Projects/custom GPTs and organized Drive folders can outperform random one-off prompts.

From theory to repeatable execution.

1. Open House Follow-Up

QR/form → CRM → instant acknowledgment → agent task → AI-drafted hot/warm/cold follow-up → nurture stop when appointment booked.

2. Buyer Consultation Recap

Fireflies/Plaud → transcript → priorities + concerns + next steps → lender intro / resource email drafts → CRM notes → tasks.

3. Seller Consultation Recap

Transcript → seller goals + objections + timing → follow-up email → CMA next-step task → FAQ/content ideas.

4. Listing Launch

Signed listing → checklist → Drive folder → task owners → AI draft property feature copy from verified notes → social/email plan → seller update cadence.

5. Showing Feedback

Feedback form/texts → summary themes → seller-facing digest → action items. Never let AI invent buyer feedback.

6. Under-Contract Communication

Milestone trigger → internal checklist → client update draft → partner update draft → exception alert when a task is late.

7. Closing + Review

Closing trigger → congratulations draft → review request → referral ask → annual-review task → approved success-story content only with permission.

8. Database Nurture

CRM segment → relevant educational message → task for high-intent replies → long-term follow-up based on actual stage and consent.

9. Past Client Annual Review

Anniversary/birthday/home date → task + context → call prep → recap → next-step resource.

10. Partner Meeting Intelligence

Transcript → goals + pain points + commitments → CRM notes → collaboration ideas → follow-up email → next touch.

11. Content Engine

Question/call/podcast → transcript → 5 ideas → 1 idea → Reel + post + email + blog + carousel + FAQ → review → schedule.

12. Weekly CEO Brief

CRM + calendar + scorecard → trends + stale follow-up + risks + opportunities → 3 human decisions → next-week priorities.

Turn conversations into coaching.

A custom AI call grader can help agents practice the part of the business that still matters most: conversations. Use transcripts/audio only where recording is lawful and permitted. The scoring framework should be behavior-based and consistent.

Dimension	What AI looks for	Why it matters
Talk / listen	Who dominates the conversation? Are pauses used?	Discovery requires space.
Question quality	Open-ended, follow-up, consequence, motivation questions	Better questions create better diagnosis.
Empathy	Acknowledgment and emotional labeling without being scripted	Trust before persuasion.
Interruptions	Talking over the client / finishing sentences	Often invisible to the speaker.
Clarity	Plain English, structure, concise explanations	Confused clients do not move.
Objections	Did agent explore the reason before answering?	Prevents premature pitching.
Next step	Was a specific, mutual action earned?	Turns a good talk into progress.
Follow-up quality	Did the agent recap what mattered personally?	Makes automation feel human.

CALL GRADER PROMPT

Grade this agent call transcript from 1-10 on: talk/listen, discovery, empathy, interruptions, clarity, objection handling, confidence, and next-step close. Show evidence from the transcript, then give 3 behaviors to repeat, 3 to change, and a 5-minute role-play drill for the weakest area.

COACHING RULE

Do not let the score become a vanity metric. Pick one behavior to improve for the next 10 calls, then re-score the same dimension.

One conversation can become a week of authority.

The content engine works because the source is real. Client questions, objections, listing lessons, local market changes, partner interviews, open-house patterns, community involvement, and your own stories are far stronger than generic prompt-generated ideas.

Source	AI repurpose instruction	Assets
Client FAQ	"Pull the clearest educational answer and simplify it."	Reel · FAQ · email · blog · carousel
Partner interview	"Pull 3 credibility ideas and mutual-value takeaways."	Clips · partner post · DM follow-up · co-branded topic
Market update	"Explain what changed and what it could mean; flag what must be verified."	Video · email · LinkedIn · seller/buyer FAQ
Listing / closing story	"Teach the lesson without exposing confidential details."	Story post · Reel · process FAQ · testimonial request
Workshop / podcast	"Extract 10 ideas and rank by usefulness to agents/clients."	Clips · posts · recap · blog · follow-up resource

WEEKLY CADENCE	BRAND SAFETY
Monday: generate 5 scripts. Tuesday: record 2 FAQs. Wednesday: record 1 authority/local video. Thursday: repurpose transcript. Friday: review replies, shares, DMs, appointments.	AI may organize your voice, but it should not fabricate experience. Never create fake client stories, fake testimonials, fake urgency, invented market statistics, or unsupported claims.

Be easier to find, understand, and trust.

Search is changing. Strong local content helps humans, Google, and AI systems understand who you serve, where you work, and what expertise you repeatedly demonstrate. This is not about gaming an algorithm. It is about publishing clear, useful, consistent proof.

Area	Build
Local clarity	Consistent city/area/service descriptions across profiles and pages.
FAQ depth	Real buyer/seller questions answered in plain language.
Entity consistency	Correct name, company, contact, licensing/profile information where required.
Proof	Reviews, media, events, community involvement, educational content, partner credibility.
Structured content	Clear headings, question-answer pages, market/resource pages, transcripts, summaries.
Freshness	Regular updates when the market, process, inventory, financing, or local conditions change.
Human authority	First-hand perspective and experience that generic AI content cannot manufacture.

LOCAL CONTENT RESEARCH PROMPT

Here are real questions from my clients and search research. Group them into buyer, seller, relocation, investment, neighborhood, financing, and process questions. Recommend 12 local educational pages or videos. For each, give the exact question, a useful answer outline, what local facts I must verify, and a simple CTA. Do not fabricate local statistics.

Move faster without creating new risk.

AI can draft, summarize, organize, and route. It can also confidently produce something wrong. Build review gates into the workflow.

Do	Avoid
Use approved/authorized tools and follow your brokerage/company policies.	Uploading confidential client data to unapproved systems.
Confirm recording consent and applicable law before recording/transcribing calls or meetings.	Assuming every conversation can be recorded because a tool allows it.
Verify property facts, pricing, MLS data, tax data, market statistics, and financing claims from source systems.	Publishing AI-generated numbers without checking the source.
Review content for Fair Housing and discriminatory targeting/language.	Using AI to make protected-class inferences or steer clients.
Keep negotiation, fiduciary judgment, legal interpretation, and emotional client decisions human.	Letting an automated agent make promises, strategy decisions, or binding commitments.
Use clear opt-out/consent practices for automated marketing where required.	Turning a database into a spam machine.
Add human approval before high-stakes outbound communication.	"Set it and forget it" on messages that affect a transaction.

RULE OF THUMB

If the output could materially affect a client’s rights, money, housing choice, contract position, confidential information, or trust - a qualified human reviews it before action.

The 30-day AI build plan.

Do not implement all tools at once. Build the system in layers. Each week produces something live and measurable.

Week	BUILDERS focus	What ships
Week 1	Blueprint + Unlock	30-day calendar audit · lead-source map · one SOP · CEO Hour · 5-number scorecard.
Week 2	Edge + Leadership	Only-Me/Assist/Automate/Delegate map · call grader test · weekly CEO brief · stop-doing queue.
Week 3	Brand + Energy	Brand OS · 10-question content bank · one-source-to-7-assets workflow · meeting-to-action scorecard.
Week 4	Replace + Scale	One live automation · partner follow-up workflow · threshold alerts · 7-day step-away test.

30-DAY SCORECARD

Metric	Baseline	30-day target	Actual
Hours reclaimed from repetitive work			
Warm leads with a clear next step			
Follow-ups older than your standard			
Appointments created			
SOPs shipped			
Automations live + tested			
Content assets from real source material			
Partner follow-ups completed			
Call-coaching behavior improved			

THE CLOSE

Systems scale you. Follow-up compounds you. Service protects you.

AI removes the administrative drag so you can spend more time in the work clients actually value:
relationships, appointments, strategy, negotiation, local expertise, and trust.

Stop chasing. Start building.

YOUR COMMITMENT

The BUILDERS step I start this week is _____

The workflow I will ship is _____

The result I will measure is _____

The date it goes live is _____

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NAHREP Central New Jersey Real Estate Agent Working Session