LOWCOUNTRY AI WORKSHOP · CHARLESTON, SC

The Real Estate Agent's Guide to Claude & Cowork

How to set up AI that works inside your actual files — contracts, inspection reports, listing folders — and the prompts to run it.

> **Written for licensed agents.** No coding. No jargon. No promises that a chatbot will replace your database.
>
> Everything here was tested on a working Charleston real estate practice, on SCR forms, against CHS Regional MLS data.

INSIDE

BEGINNER GUIDE · REVISION A

REVISED SEPTEMBER 18, 2026

START HERE

Read this first: what changed on September 16

Most AI guides written for agents this year are already describing a product that no longer looks the way they say it does.

Until recently, Claude had two front doors. **Chat** was the box you typed into. **Cowork** was a separate mode you switched to when you wanted Claude to actually go work — open your files, run a multi-step job, build a document, keep going while you did something else.

On **September 16, 2026**, Anthropic began merging the two. The company's phrasing was blunt: "*Claude Cowork is now just Claude.*" There is no mode to pick anymore. You describe what you want, and Claude decides whether that is a two-sentence answer or a forty-minute job across eleven files.

What this means for you, practically

- If you are on **Pro or Max**, the merge is rolling out to you now. You may see the change any day, or you may already have it.
- If you are on **Team**, it is coming. If you are on the **Free** plan, it has not arrived yet — and the file-based work this guide is built around is not available to you at all.
- During the staged rollout you may still see a **"Cowork"** option in your message box. If you do, use it. It is the same engine.
- **Nothing you have already built is lost.** Existing Cowork tasks, projects and connected folders carry over.

Why lead a beginner guide with a product change? Because the single most common reason agents give up on AI in week two is that they followed instructions that no longer match what is on their screen, concluded they had done something wrong, and quit. You did not do anything wrong. The product moved.

The honest version: this guide has a shelf life. Anthropic ships changes to Claude roughly every few weeks. The *workflows* and the *prompts* in here will outlast the interface — the menus will not. When a screenshot in any AI guide does not match your screen, trust your screen.

THE GAP

82% of agents already use AI. Almost none of them are getting paid for it.

The adoption problem is solved. The competence problem is wide open.

In February 2026, RPR — a subsidiary of the National Association of REALTORS® — surveyed 225 real estate professionals. The headline number was **82% already using AI in their business**, with 92% either using it or planning to. Only 8% said never.

Then the survey asked what they were nervous about, and the picture got more interesting:

WHAT AGENTS WORRY ABOUT	SHARE	WHAT IT ACTUALLY MEANS
Accuracy of what it produces	63%	They do not know how to check it
Compliance or legal exposure	49%	Nobody taught them the guardrails
Misreading market data	47%	They are pasting numbers without sourcing them
Fair Housing violations	28%	A real risk, and the one most often ignored

Meanwhile, the tasks agents actually run it on are almost entirely cosmetic: listing descriptions (68%), social content (59%), emails and newsletters (53%). Seventy-one percent say the main benefit is time savings — 68% save **at least an hour a week**, and only 34% save more than four.

> **Read that again.** Four in five agents have adopted AI, and for two-thirds of them the return is an hour or two a week of faster copywriting. That is not a technology problem. That is a *use-case* problem. Everyone pointed the most capable tool of their careers at the easiest task on their desk.

Where the hours actually are

The work that eats a Charleston agent's week is not writing listing copy. It is the transaction: reading a 40-page inspection report at 9pm, rebuilding a deadline calendar after a contract amendment, chasing a lender for a clear-to-close, explaining to a seller why the appraisal came in low. That work is document-heavy, deadline-driven, repetitive, and almost nobody is using AI on it — because a chat box cannot read your transaction folder.

That is the entire reason this guide is about Claude specifically.

A note on why Claude, honestly

NAR's own 2025 technology survey (1,241 responses) asked agents which AI tools they use. ChatGPT led at 58%, Gemini 20%, Copilot 15%. **Claude was not on the list at all.**

That cuts two ways, and you deserve both edges:

- **Against it:** your peers are not using it, your brokerage's tech stack probably does not mention it, and you will not find a Facebook group full of Claude-for-realtors tips the way you will for ChatGPT.
- **For it:** the file-and-folder working model described in this guide is the thing that turns AI from a copywriter into a transaction coordinator. That is where the unclaimed hours are. And your competition is not there yet.

> **What this guide will not tell you:** that one tool is objectively best. Use what your brokerage supports and your license law allows. If you are deep in ChatGPT and it is working, most of the prompt library starting on page 11 will transfer with minor edits. The setup chapter will not.

CHAPTER ONE

Setup, in about twenty minutes

Five steps. Do them in order. Do not skip step three — it is the only one that matters.

Step 1 — Pick a plan (and do not overbuy)

PLAN	PRICE	HONEST VERDICT FOR AN AGENT
Free	$0	Fine for trying the chat box. **Cannot do the file work in this guide.** Do not build a workflow on it.
Pro	$20/mo $17/mo annual	**Start here.** Unlocks working sessions, connected folders and projects. This is the plan the rest of this guide assumes.
Max	from $100/mo	5× or 20× the usage. Only worth it once you are actually hitting limits — which takes most agents a few months, if ever.
Team	$25/seat/mo $20 annual	For a team of 2–150 with shared projects. Right answer for a listing team; overkill for a solo agent.

Prices verified at claude.com/pricing on September 18, 2026. Anthropic changes plans and limits; check before you buy.

> **Budget reality:** $20/month is roughly one-sixtieth of a single side on a $400,000 Charleston sale. If this guide saves you two hours a month, it has paid for itself several times over. If it saves you nothing, cancel in month two. Do not let a subscription sit there generating guilt.

Step 2 — Install the desktop app

Claude runs in a browser, on your phone, and as a desktop application for macOS, Windows, Linux and ChromeOS. **Install the desktop app.** It is the only version that can reach files sitting on your own computer, and files are the whole point.

Sessions keep running when you close the app or your laptop sleeps — but if the job touches your local files, leave the app open so Claude can actually reach them.

Step 3 — Connect exactly one folder

This is the step that separates agents who get value from agents who quit. In the desktop app, connect a folder. Claude can then read, search, and write files inside it — and nothing outside it.

Pick the right first folder

Good first folder: one active transaction. `/145 Rutledge Ave/` containing the executed contract, the inspection report, the disclosure package, and your notes. Small, real, and you already know what is in it, so you can tell when Claude gets something wrong.

Bad first folder: your entire Dropbox. Twelve years of files, four naming conventions, three dead clients' tax documents. You will get vague answers and learn nothing.

Worse: a folder containing anyone's Social Security number, bank statements, or full loan file. See the compliance chapter before you connect anything with client financials in it.

Step 4 — Write folder instructions

Once a folder is connected you can give it standing instructions — context that applies every time you work in it, so you stop re-explaining yourself. Put in the things that never change:

FOLDER INSTRUCTIONS · EXAMPLE

A transaction folder

```
This folder is one residential transaction in Charleston, South Carolina.
I am the [listing / buyer's] agent. My brokerage is [Brokerage Name].

Contracts here use South Carolina REALTORS® (SCR) forms. Dates are calendar days
unless the form says business days. Always show me the form name and paragraph
number you pulled a date or term from.

Never draft anything that states a legal conclusion or interprets the contract for
my client. Draft it as an internal note for me, and flag anything that should go
to my broker-in-charge or an attorney.

When you write a document, save it into this folder. Do not overwrite anything.
```

Why it works: it establishes the jurisdiction, the forms, the citation requirement, and the compliance boundary once — instead of you remembering to say it in every prompt.

Step 5 — Turn on a Project for the standing stuff

A **Project** holds context that spans many conversations: your bio, your market, your brokerage's advertising requirements, your voice, your standard disclaimers. Build one called "My Practice" and put the boilerplate in it once. Then you never type it again.

Twenty minutes, honestly spent: five on the plan, five on the install, and ten on picking and describing one folder. The last ten minutes are the ones that produce the returns.

CHAPTER TWO

The one idea that changes the return

Stop pasting. Start pointing.

Almost every agent using AI today is doing the same thing: copying a chunk of text out of something, pasting it into a chat box, reading the answer, and copying it back out. That is a faster typewriter. It is not leverage.

The shift is small to describe and large in effect. Instead of bringing the material to the tool, you point the tool at the material and describe the outcome.

THE WAY MOST AGENTS WORK	THE WAY IT SHOULD WORK
"*Summarize this contract.*" — then you paste eleven pages. • You have to find and open every document first • Long documents get truncated or pasted badly • The answer lives in a chat window and dies there • Tomorrow you start from zero • One document at a time, forever	"*Read every PDF in the 145 Rutledge folder and build me a deadline calendar.*" • It opens the files itself — all of them • It cross-references the contract against the amendment • It writes a new file back into the folder • The folder instructions still apply next week • Eleven documents is the same effort as one

What "working session" actually looks like

When you give Claude a real job rather than a question, it will tell you its plan before it starts, then work through it — opening files, taking notes, building the output, checking back with you when something is ambiguous. A job that would be forty minutes of your evening runs while you drive to a showing.

Three sentences that unlock most of the value

- **"Read everything in this folder and tell me what you found before you do anything."** — forces an inventory first, so you catch a missing document.
- **"Save that as a file in this folder."** — turns an answer into an asset.
- **"Show me which document and which paragraph each date came from."** — makes it checkable, which is the difference between a tool and a liability.

The rule that keeps you licensed: Claude reads and drafts. *You* verify and send. Every date it hands you gets checked against the executed contract before it touches a client. Every number gets checked against the MLS. This is not optional caution — it is the difference between a productivity tool and a complaint to the Commission.

CHAPTER THREE

Five workflows that pay for the subscription

In rough order of how much time they give back. Start with the first one.

1. The Transaction Brief

INPUT: EXECUTED CONTRACT + AMENDMENTS · OUTPUT: ONE-PAGE SUMMARY + DEADLINE CALENDAR · ~35 MIN SAVED PER FILE

The problem: a ratified contract arrives and you now owe yourself a clean picture of dates, contingencies, who owes what, and when. Most agents rebuild this by hand for every deal, and the errors are the expensive kind.

What to say: "*Read the executed contract and every amendment in this folder. Build me a one-page transaction brief: parties, price, financing type, earnest money, every contingency with its deadline as an actual calendar date, and who is responsible for each. Then list anything that is ambiguous or missing. Cite the paragraph for every date.*"

The guardrail: check every date against the contract yourself before you calendar it. Ask it to flag which dates it calculated versus which were written on the form.

2. The Inspection Response

INPUT: INSPECTION REPORT PDF · OUTPUT: TRIAGED REPAIR LIST + NEGOTIATION OPTIONS · ~50 MIN SAVED

The problem: a 40-page report lands at 8pm, your buyer is anxious, and the response deadline is in three days. Reading it carefully is an hour you do not have; reading it carelessly is a liability.

What to say: "*Read the inspection report in this folder. Sort every finding into three groups: safety or structural, material defects worth negotiating, and normal wear for a home of this age. For each item in the first two groups, note the page number and what the inspector actually wrote. Do not estimate repair costs. Then draft three negotiation approaches — ask for repairs, ask for credit, walk — with the argument for each.*"

> **Hard line:** never let AI characterize the severity of a structural or safety finding to a client. It sorts and summarizes so *you* can read faster. The opinion is yours, or a licensed inspector's, or an engineer's.

3. The Listing Launch Pack

INPUT: PROPERTY FACTS + YOUR NOTES · OUTPUT: DESCRIPTION, 5 SOCIAL POSTS, EMAIL, FLYER COPY · ~70 MIN SAVED

The problem: every new listing needs eight pieces of copy in four voices, and you write them at 11pm.

What to say: "*Using the property facts in this folder and my brand voice from my Practice project, write: an MLS description under [character limit], a long-form version for my website, five social captions in different angles, a just-listed email to my database, and open house flyer copy. Save each as a separate file.*"

The guardrail: this is where Fair Housing violations get generated. See Chapter Six before you run it. Every draft gets read for language about who lives there, not just what is there.

4. The CMA Narrative

INPUT: YOUR COMPS EXPORT · OUTPUT: THE STORY YOU TELL THE SELLER · ~30 MIN SAVED

The problem: you have the comps. What you need is the three-paragraph explanation that makes an optimistic seller accept the number.

What to say: "*Here are the comparables I selected. Do not change my adjustments or my price opinion. Write the narrative I will present: what the market is doing in this submarket, why these four properties are the right comparisons, and what the pricing risk is if we list above [X]. Plain language, no jargon, and anticipate the three objections a seller will raise.*"

> **Note the phrasing.** You pick the comps and you set the price. It writes the explanation. Handing an AI your pricing opinion is how you end up defending a number you cannot support.

5. The Weekly Database Sweep

INPUT: CRM EXPORT (NAMES REMOVED) · OUTPUT: A PRIORITIZED CALL LIST WITH REASONS · ~40 MIN SAVED

The problem: you have 900 contacts and you call the same eleven people.

What to say: "*Here is an export of my database with last-contact dates, source, and stage. Build me a call list of 15 for this week, ranked. For each, tell me why now and give me a one-line opener that references something real from the notes column. Flag anyone who has gone more than 180 days without contact.*"

The guardrail: strip phone numbers, emails and addresses before you export. Claude does not need them to prioritize, and you do not need them in the file.

> **Do not try all five this month.** Pick number one, run it on your next three transactions, and get to the point where you trust it and know exactly where it gets things wrong. Then add the second. Agents who try to automate everything in week one automate nothing by week four.

CHAPTER FOUR

The prompt library

Twenty-six prompts you can run this week. Anything in **[gold brackets]** is a fill-in.

Three rules before you copy anything

- **Never paste client identifiers.** No Social Security numbers, account numbers, dates of birth, or full loan documents. Ever. Not once. Chapter Six explains why.
- **Replace the brackets.** A prompt with the placeholders still in it produces generic output, and generic output is why people conclude AI does not work.
- **The first answer is a draft.** The best results come from the second and third pass. Chapter Five shows you how to push.

A. Listings & marketing

PROMPT 01

The listing description that is not AI slop

```
You are writing an MLS listing description for [address, city].

Facts: [beds, baths, sq ft, year built, lot, key features]
What I noticed walking it: [2-3 specific observations in your own words]
Buyer we are targeting: [who realistically buys this]

Write it under [character limit] characters. Lead with the single most
compelling true thing, not the square footage. No "nestled," "boasts," "oasis,"
"dream home," or "must see." Describe the property, never the neighbors or who
would live here. Give me three versions with different opening lines.
```

Why it works: your walk-through observations are the only input the tool cannot generate. That is what makes the copy sound like a person saw the house.

PROMPT 02

Five social captions, five different angles

```
From the listing description in this folder, write five social captions for
[Instagram / Facebook]. Use a different angle in each: the feature angle,
the lifestyle angle, the price/value angle, the neighborhood angle, and one
that opens with a question.

My voice: [describe it, or reference your Practice project]
Keep each under 60 words. No hashtag walls — three max, and only ones a real
Charleston buyer would follow. Include my brokerage name in each per SC
advertising rules.
```

Watch for: the "neighborhood angle" is the one most likely to drift into Fair Housing trouble. Read it twice.

PROMPT 03

Turn one listing into a week of content

```
Take the listing at [address] and build me a week of content that is
not all "look at this house."

Give me: one post about a design or construction detail in it that teaches
something, one about the submarket's numbers [paste your own stats], one
behind-the-scenes about prepping a listing, one answering a question buyers
actually ask me [the question], and one open house promo.

Format each with the hook on its own line. Tell me which one to post when.
```

Why it works: five posts about one house reads as desperate. Five posts *from* one house reads as expertise.

PROMPT 04

The just-listed email that gets opened

```
Write a just-listed email to my sphere about [address].

Constraint: most of my list will never buy this house. So the email has to be
worth reading anyway. Lead with one genuinely interesting thing about the
property or the street, then the listing details, then a soft ask to forward it.

Subject line: give me five options, none with emoji, none with "JUST LISTED"
in all caps. Under 200 words total.
```

Push it further: follow with "*Now write the version I'd send to the twelve people who actually might buy it.*"

PROMPT 05

Price improvement, without the apology

```
We are reducing [address] from [$X] to [$Y] after [N] days and
[N] showings.

Write three things: (1) the note to my seller explaining what the market told
us, framed around data not failure; (2) a social post announcing the new price
that reads like news, not a retreat; (3) an email to the agents who showed it.

Never use the words "motivated seller," "price reduced," or "bring all offers."
```

The seller note is the valuable one. That conversation is where listings are lost.

B. Client communication

PROMPT 06

Buyer consultation prep

```
I have a buyer consultation [when]. Here is what I know: [budget range,
timeline, financing type, must-haves, what they said on the phone].

Build me a prep sheet: the five questions I should ask that I probably won't
think of, the three things about the current [submarket] market they need
to hear early, and the two objections this specific buyer profile usually
raises — with how I'd answer each.

One page. I'm reading it in the car.
```

Why it works: it is preparation, not automation. You still have the conversation.

PROMPT 07

The weekly seller update that stops the "any news?" text

```
Write my weekly update to the seller at [address].

This week: [showings, feedback, market activity, what you did]

Structure it as: what happened, what it means, what I'm doing next week, what
I need from you. Be honest about a slow week — do not manufacture momentum.
If the honest read is that we have a pricing problem, say so plainly and give
me the sentence that opens that conversation.
```

The "do not manufacture momentum" line matters. Without it you will get cheerful nonsense.

PROMPT 08

Rewrite the email I should not send

```
Here is a draft I wrote while annoyed: [paste your draft]

Rewrite it so it is direct, unemotional, and impossible to screenshot against
me. Keep every substantive point — do not soften the position, soften the
tone. Then tell me the one sentence in my original that would have caused the
most damage, and why.
```

Use this one. It is the single highest-ROI prompt in this guide and it takes nine seconds.

PROMPT 09

Explain it like they are not in the business

```
My client asked: [their question, in their words]

Explain the answer in plain language, under 150 words, no industry terms unless
you define them in the same sentence. Assume they are smart and busy, not
uninformed.

Then flag anything in my answer that is legal advice, tax advice, or a question
for their lender — because I am not answering those.
```

That last paragraph is a compliance habit. Build it into every client explainer prompt you write.

PROMPT 10

The past-client check-in that is not "just checking in"

```
Write a check-in to a past client. Details: bought [when], [neighborhood],
what I remember about them: [something real].

It must give them something before it asks for anything: what their home is
likely worth now given [paste your own market data], or a heads-up about
[reassessment, insurance, a neighborhood change].

Under 120 words. No "I was just thinking about you." No "let me know if you
know anyone looking."
```

Never let it invent the market data. You paste the numbers; it writes the sentence around them.

C. Transaction management

PROMPT 11

Contract to deadline calendar

```
Read the executed contract and every amendment in this folder.

Build a deadline table: item, date as an actual calendar date, source document
and paragraph, who is responsible, and whether the date was written on the form
or calculated from the effective date.

Assume calendar days unless the form specifies business days — and tell me
which ones you had to assume. List separately anything ambiguous, missing, or
inconsistent between documents.
```

The "written vs. calculated" split is the whole trick. It shows you exactly which dates to double-check.

PROMPT 12

Triage the inspection report

```
Read the inspection report in this folder. Sort every finding into:
(1) safety or structural, (2) material defects worth negotiating, (3) normal
wear for a [year built] home in the Lowcountry.

For groups 1 and 2, quote what the inspector actually wrote and give the page.
Do not estimate repair costs. Do not characterize severity beyond the
inspector's own words. Flag anything the report says needs further evaluation
by a specialist.
```

Lowcountry specific: add "*pay particular attention to moisture, crawlspace, HVAC, and any flood or elevation references.*"

PROMPT 13

Draft the repair request three ways

```
Based on the triaged inspection findings, draft three versions of the repair
request for my buyer to consider:

A. Ask for repairs — the shortest defensible list
B. Ask for a closing cost credit instead — with the reasoning
C. The aggressive version, and an honest note on what it risks

Write these as internal options for me and my client to discuss, not as the
final document. Note which items I should not ask for and why.
```

Then you write the actual form. This drafts the thinking, not the contract.

PROMPT 14

The Monday transaction sweep

```
Look at every transaction folder connected here. For each one, tell me:
what is due in the next 7 days, what is overdue, what document I am still
missing, and the single next action I owe someone.

Sort by urgency. Put anything that could blow a deadline at the top in its own
section. If a folder has had no new document in 10+ days, flag it.
```

This is the workflow that makes the subscription obviously worth it — once you have three or four folders connected.

PROMPT 15

Closing week checklist

```
We close [address] on [date]. I am the [listing / buyer's] agent.

Build the checklist for the final 10 days from the documents in this folder:
what I need from the lender, the attorney, the client, and the other side; what
I owe each of them; and what typically goes wrong in this window that I should
get ahead of now.

Charleston closings are attorney-conducted — account for that.
```

Add: "*and tell me what my brokerage's file needs for compliance*" if your BIC has a checklist.

D. Pricing & market

PROMPT 16

The CMA narrative (you keep the pricing)

```
Here are the comparables I selected and my adjustments: [paste]
My price opinion: [$X]. Do not change it, and do not suggest a different
number.

Write the narrative I will present to the seller: what the market is doing in
[submarket], why these specific comps are the right comparisons, and what
the risk is of listing above my number. Plain language. Then list the three
objections this seller is most likely to raise and how I'd answer each.
```

"Do not change it" is load-bearing. Without it you will get a second opinion you did not ask for and cannot defend.

PROMPT 17

Monthly market update from your own data

```
Here is this month's data for [area]: [paste median price, DOM, inventory,
months of supply, closed volume, and the same figures from 12 months ago]

Write a market update for consumers: what changed, what it means for a buyer,
what it means for a seller, and one thing most people will get wrong about
these numbers.

Use only the figures I gave you. Do not add context you cannot source to them.
Cite [your MLS/data source] at the bottom.
```

The "use only the figures I gave you" constraint is mandatory. Market commentary is exactly where AI invents plausible numbers.

PROMPT 18

Explain the appraisal gap

```
The appraisal on [address] came in at [$X] against a contract price of
[$Y].

Write two things: the explanation I give my [buyer / seller] of what this
actually means for them, and a plain list of the options available under our
contract [paste the relevant paragraph] — with the practical trade-off of
each.

Do not tell them what to do and do not interpret the contract as legal advice.
Flag where they should talk to the attorney or lender.
```

Notice the pattern. Every high-stakes prompt ends with an instruction about where your license stops.

PROMPT 19

Listing presentation, tailored

```
I am presenting to a seller at [address] on [date]. What I know about
them: [situation, timeline, motivation, who else they're interviewing].

Build the outline of my presentation around what this seller cares about —
not a generic deck. Tell me which three slides matter most for them, what to
cut, and the one question I should open with.

Then give me my answer to "why you and not [competitor]?" in under 40 words.
```

Under 40 words is the constraint that makes this useful. Long answers to that question lose listings.

E. Business operations

PROMPT 20

The prioritized call list

```
Attached is a database export with last-contact date, source, stage, and
notes. I have removed phone numbers, emails and addresses.

Build a ranked call list of 15 for this week. For each: why now, and a one-line
opener referencing something real from the notes. Flag anyone past 180 days
without contact in a separate section.

Then tell me what the export says about my follow-up habits that I won't like.
```

That last line is the good part. It will find the pattern you are avoiding.

PROMPT 21

Write the SOP you keep meaning to write

```
I am going to describe how I handle [new listing intake / buyer onboarding /
closing file]. Ask me questions one at a time until you have the full process,
then write it as a checklist an assistant could follow without asking me
anything.

Flag the steps where I am the bottleneck and the steps that could be delegated
today. Save it as a file in this folder.
```

"One at a time" matters. Otherwise you get twelve questions at once and answer three.

PROMPT 22

Year-to-date reality check

```
Here is my production data: [closed sides, volume, GCI, sources, average price,
by month]. Here is last year's: [same].

Tell me what actually changed, what is a trend versus a rounding error at my
volume, and which lead source is quietly carrying my business. Then tell me the
one number I should be managing for the rest of the year and why.

Be blunt. Do not congratulate me.
```

"Do not congratulate me" saves you two paragraphs of praise you did not ask for.

PROMPT 23

Vendor and expense audit

```
Here are my business subscriptions and what I pay: [list with monthly cost].
Here is what I actually used each one for in the last 90 days: [honest notes].

Group them into: paying for itself, unclear, and cancel. For the unclear group,
tell me the one question I'd need to answer to decide. Total the annual cost of
the cancel pile.
```

Run this in January. Most agents are carrying $200+/month of tools they stopped opening.

F. Content & visibility

PROMPT 24

The neighborhood guide that ranks

```
Write a guide to [neighborhood] for people considering buying there.

Cover: what the housing stock actually is, the price range as of [paste your
data], commute realities, what it's like day to day, and — honestly — who
should not buy here and why.

Describe the place, the housing, and the amenities. Never describe the people
who live there, and never use language that signals who a neighborhood is "for."
Cite my data source. 800–1,000 words.
```

The honest "who shouldn't buy here" section is what makes a neighborhood guide worth reading — and what gets it cited by AI search.

PROMPT 25

Video script for an agent who hates video

```
Write a 60-second script on [topic].

Structure: a hook in the first 3 seconds that is a specific claim, not a
question; the point; one concrete Charleston example; one sentence of what to
do about it. No "hey guys." No "in today's video." No sign-off.

Write it the way I talk, not the way people write. Short sentences. Mark where
I should pause.
```

Then read it out loud once. Anything you stumble on, cut.

PROMPT 26

Answer the question buyers actually ask

```
Buyers keep asking me: [the question]

Write the definitive answer for my website. Assume the reader found this through
a search or an AI assistant and has no idea who I am. Answer the question in the
first two sentences — do not build up to it.

Then add the nuance, then the Charleston-specific detail nobody else will
include. End with what they should ask their agent next, not a pitch.
```

Answer-first structure is how you get quoted by ChatGPT, Perplexity and Google's AI summaries. Build-up gets skipped.

CHAPTER FIVE

Writing your own prompts

The library runs out. The method does not.

Every prompt in Chapter Four is built from the same four parts. Once you see them, you can write your own.

PART	WHAT IT DOES	WEAK VERSION → STRONG VERSION
1. Role & context	Tells it whose problem this is and what world it is in	"Write a listing description" → "You are writing an MLS description for a 1920s Charleston single at 145 Rutledge, targeting a buyer relocating for MUSC"
2. Material	Points it at the real inputs	Pasting three facts → "Read every document in this folder"
3. The job	Says what to produce — and what *not* to	"Summarize it" → "Sort every finding into three groups, quote the inspector, do not estimate costs"
4. Format & limits	Shape, length, banned words, citation rules	(nothing) → "Under 200 words, table format, cite the paragraph for every date"

The part most agents skip: negative instructions

Telling a tool what *not* to do improves output more than any other single change — left alone, it defaults to the most average version of the thing.

A starter ban list for real estate

nestled · boasts · oasis · dream home · must see · stunning · charming (unless you mean it) · hidden gem · truly · unparalleled · a rare opportunity · won't last · motivated seller · bring all offers · in today's market · let me know if you have any questions · just checking in · I hope this email finds you well · at the end of the day · delve · tapestry · testament to

Also ban: em dashes if you never use them, exclamation points, emoji in professional email, and any sentence that begins "In a world where."

Four follow-ups that fix almost anything

- **"That's too generic. Give me the version that could only be about this property."**
- **"Cut it by half. Keep the specifics, lose the transitions."**
- **"What did you assume that I didn't tell you?"** — this one surfaces the invented details before they reach a client.
- **"Now argue against your own draft. What's weak about it?"**

> **The 80/20:** if you only change one habit, stop accepting the first answer. The first answer is the average of everything ever written about your question. The third answer, after two rounds of "more specific, and cut it," is usually the one worth sending.

CHAPTER SIX

Guardrails: the chapter that keeps your license

Forty-nine percent of agents name compliance as their top AI worry. They are right to. Here is the actual map.

1. Fair Housing is the real exposure

AI writes in the voice of everything it has read, and a great deal of what it has read is old real estate marketing — which is full of language that is now actionable. It will produce Fair Housing problems cheerfully and at speed.

> **Never let a draft describe who lives somewhere, who would like it, or who it is right for.** Describe the property and the amenities. Nothing about people.

Phrases to strike on sight

"Perfect for a young family" · "walking distance to *[specific house of worship]*" · "safe neighborhood" · "good schools" or any school quality claim · "great for empty nesters" · "exclusive community" · "traditional neighborhood" · "master bedroom" (use primary) · "handicap accessible" (use accessible features) · "ideal for professionals" · "no children" or any occupancy framing · "up-and-coming area" · "quiet, established residents"

The test: if a sentence tells the reader what kind of person belongs here, it comes out — no matter how well-meant. Schools in particular: give the district and the attendance zone as fact, never a quality judgment, and point people to the district's own data.

Add this line to every marketing prompt you write

```
Follow Fair Housing rules strictly. Describe the property, never the people.
No references to family status, age, race, religion, national origin, disability,
sex, or familial makeup. No school quality claims and no safety claims.
```

2. What never goes into any AI tool

- Social Security numbers, tax ID numbers, dates of birth
- Bank account, routing, or card numbers
- Full mortgage applications, loan estimates with account detail, or credit reports
- Anything covered by your brokerage's confidentiality policy
- MLS data feeds or photos you do not have the right to redistribute
- Another agent's copyrighted listing copy or photography

If you must work with a document containing this material, **redact it first.** Claude does not need a client's SSN to summarize their purchase contract.

3. Talk to your broker-in-charge before you scale this

Many brokerages adopted formal AI policies in 2025 and 2026 — covering what tools are approved, what client data may be processed, what disclosure is required, and what must stay in the brokerage's own systems. **Your BIC's policy overrides anything in this guide.** Ask before you connect a folder of client files, not after.

4. South Carolina advertising rules still apply

SC license law requires your advertising to identify the brokerage. AI drafts drop that detail constantly — it does not know your brokerage exists unless you tell it. Put your brokerage name and any required disclosure into your Project instructions so it appears in every draft, and check for it anyway before anything is published.

5. It is not your attorney, your lender, or your inspector

Claude will produce a confident-sounding answer about contract interpretation, tax consequences, or what a structural finding means. Those answers are drafting material for *you*, never advice for a client. South Carolina closings are attorney-conducted for a reason. Draw the line in the prompt itself — several prompts in Chapter Four show you how.

6. Verify every number, every time

The failure mode that will embarrass you is not a wrong opinion. It is a plausible, specific, invented number — a median price, a days-on-market figure, a deadline — delivered with total confidence. **Every figure that reaches a client gets checked against the MLS or the executed document first.** No exceptions, and no "it's probably right."

> **Disclosure:** there is no universal rule requiring you to disclose AI assistance in marketing copy, and practice varies. But if a client asks whether AI was involved in something, answer honestly. The reputational cost of being caught hedging is far higher than the cost of saying yes.

CHAPTER SEVEN

Nine things not to do with it

Most of these are things people tried in 2026 and regretted.

1. **Do not let it answer clients directly.** No autoresponder on your business email, no unsupervised chatbot on your site handling real inquiries. The one time it invents a commission structure or a property detail, it happens in writing, to a consumer.
2. **Do not let it set your price.** You are the one with a license and an errors-and-omissions policy. It writes the narrative; you own the number.
3. **Do not paste client financials.** Covered above, and worth repeating because it is the mistake with the largest downside.
4. **Do not publish market statistics it produced.** If you did not pull the number from the MLS yourself, it does not go in a post.
5. **Do not use it to write anything legally operative** — addenda, amendments, disclosures, agency agreements. Use the forms. That is what they are for.
6. **Do not automate your database before you have tested it manually.** A bad sequence sent to 900 people is not a learning experience, it is an unsubscribe event.
7. **Do not let it write in a voice that is not yours.** Clients who have met you can tell. The gap between your emails and your in-person self is a trust problem, not a style problem.
8. **Do not connect your whole drive on day one.** One folder. See Chapter One.
9. **Do not tell yourself you will check it later.** You will not. Check it now, or do not send it.

The honest summary of the risk

Nothing in this guide is risky if you treat every output as a draft from a fast, well-read, occasionally overconfident assistant who has never been to Charleston and does not hold a license. It becomes risky the moment you treat it as a source of truth. That distinction is the entire job.

CHAPTER EIGHT

Your first week

Roughly twenty minutes a day. By Friday you will know whether this is worth keeping.

DAY	DO THIS	YOU SHOULD END UP WITH
Monday	Subscribe to Pro. Install the desktop app. Connect *one* active transaction folder and write folder instructions (Chapter One, Step 4).	A connected folder and five minutes of mild skepticism.
Tuesday	Run Prompt 11 — contract to deadline calendar — on that transaction. Then check every single date against the contract yourself.	A calendar, and a clear sense of what it got right and where it guessed.
Wednesday	Run Prompt 08 on a real email you are annoyed about. Then Prompt 01 on your next listing.	One email you are glad you did not send as written.
Thursday	Build your "My Practice" project. Put in your bio, brokerage, market, voice, banned words and the Fair Housing line from Chapter Six.	Every future draft starting from your standards instead of the internet's.
Friday	Run Prompt 12 on any inspection report you have — even a closed file. Compare its triage to what actually happened in that deal.	An honest read on whether you trust it with the document work.
Week 2	Connect a second transaction folder. Run Prompt 14 on Monday morning.	The first moment it does something you could not have done manually.

> **If Friday comes and you are not convinced, cancel.** Seriously. A subscription you are not using is worse than no subscription, because it sits there as evidence that "AI didn't work for me." Better to cancel, and come back when you have a specific job for it.

Where agents actually get stuck

- **"It can't see my files."** You are in the browser, not the desktop app — or the folder is not connected. Both are Chapter One.
- **"The output is generic."** You left the brackets in, or you gave it no material. Give it the folder and your own observations.
- **"It made something up."** It will. That is why every prompt in Chapter Four asks for citations and every number gets verified. This is a feature of the tool, not a bug you can configure away.
- **"I ran out of usage."** Working sessions consume far more than chatting. Space the big jobs out, or move up a plan — but only once it is clearly earning.
- **"The screen doesn't match the guide."** The product changed. Read Chapter One again.

You've got the map. Want someone in the room?

This guide covers the setup, eight chapters and twenty-six prompts. What it cannot do is sit next to you while you connect your own folder, look at your own transaction, and fix the one thing that is not working.

Free AI Workflow Audit

60–90 minutes, no cost, no pitch. We look at where your week actually goes and you leave with a written report of the three workflows worth automating first.

Live workshops & the four-week series

Small groups of licensed agents, on your own laptop, in your own accounts. Transaction management, listing marketing, and building the dashboard that runs your deals. Charleston area, in person.

Brokerage & team training

On-site programs from a 60-minute introduction to a full rollout, built around your forms, your CRM and your compliance requirements.

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