A CLAUDE PLAYBOOK FOR REAL ESTATE AGENTS

Stop asking. Start delegating.

Every setup step, the Second Brain kit and every prompt from the class. Claude does the work. You make the call.

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Start here

Most agents use AI like a search bar. One question, one answer, copy, paste, close the tab. That's asking. This playbook is about the other thing: having Claude do the work.

Read your inbox and tell you what's due today. Pull the red flags out of an 87-page HOA packet, with page numbers. Turn one new listing into six pieces of marketing. Have your morning brief waiting before you're out of bed.

The numbers say most of the industry is still asking. Writing tools are the most-used AI tool among agents, at 78% (NAR 2025 Technology Survey). And while 82% of agents now use AI, only 17% report

a measurable positive impact on their business (RealScout). The gap isn't the tool. It's using it to write instead of using it to work.

The four levels

1. **Ask.** You type a question, Claude answers. Where most agents are.
2. **Teach.** Claude knows who you are, how you write and what you never say. Every answer starts closer to done.
3. **Connect.** Claude can see your Gmail, calendar and files, so it works from your real deals instead of what you remember to paste in.
4. **Delegate.** Claude runs a task on a schedule or clicks through a website for you, while you do something else.

Each play below is tagged with the level it needs. You don't need level 4 to get value. You need level 2 for almost everything.

How this playbook is laid out

- **Part 1: Setup.** About 30 minutes, once.
- **Part 2: The building blocks.** What each piece of Claude is and when to use it.
- **Part 3: Your Second Brain.** One source of truth that every AI tool reads from.
- **Part 4: Twelve plays.** Each one has what it does, what you need, the steps, a copy-paste prompt, and what to watch for.
- **Part 5: Guardrails.** Privacy, Fair Housing and what Florida Realtors is telling agents about AI.
- **Part 6: A 30-day rollout.** One play a week.
- **Prompt library, FAQ and your giveaways** at the end.

Three ground rules

1. **Claude drafts. You decide.** Nothing goes to a client, an MLS or a contract without your eyes on it. You're still the licensee.
2. **One play at a time.** Get one running every day before you add the next. The agents who try all twelve this week use none of them next month.

3. **Fill in the brackets.** Every [bracket] in a prompt is where your details go. Specific in, specific out.

Part 1: Setup in 30 minutes

Do this once, in this order. Every play in this guide gets better because of it.

A heads-up: Claude's menus move around as the app updates, and some accounts show an older layout. If a button isn't exactly where this says, search the setting name at support.claude.com.

Step 1: Pick your plan

The free plan is fine for trying Claude out. Most of what makes Claude do work (scheduled tasks, Claude in Chrome, the Word and Outlook add-ins) needs a paid plan.

PLAN	PRICE	WHO IT'S FOR
Free	$0	Testing. Chat and up to five Projects.
Pro	$20 a month (about $17 billed yearly)	Most working agents. Start here.
Max	$100 or $200 a month	Heavy daily users who keep hitting Pro's limits.
Team	Priced per seat	Teams and brokerages that want shared Projects and admin controls.

Start on Pro. Move up only if you're hitting the usage limit several times a week.

Step 2: Get Claude everywhere you work

1. **Desktop app** (Mac or Windows) from claude.com/download. This is where you'll do most of the real work.
2. **Phone app** (iPhone or Android). For voice mode in the car and quick questions between showings.
3. **Browser** at claude.ai works too. Same account, same history everywhere.

Step 3: Set your privacy first

You're going to put deal documents in here, so decide this before you upload anything.

1. Click your initials in the bottom left, then **Settings**, then **Privacy**.
2. Find **Help improve Claude**. When it's off, your new chats aren't used to train Claude's models. Most agents should turn it off.
3. For a one-off sensitive conversation, start an **Incognito** chat. Those are never used for training.
4. Check your brokerage's AI policy. If your broker hasn't approved a tool for client information, don't put client information in it.

Step 4: Write your Instructions

Instructions are the standing directions Claude reads before every conversation: who you are, your market, how you write, what you never say.

1. **Settings**, then look for **Instructions** (some layouts call it **Instructions for Claude** or put it under **Your Claude** or **General**).
2. Paste your profile. Play 1 gives you a prompt that writes it for you.

Step 5: Turn on memory

1. **Settings**, then **Capabilities** (or **Memory**).
2. Turn on **Search and reference chats** and **Generate memory from chat history**.
3. Once a month, open the Memory page and read what Claude has saved. Delete anything wrong or anything you wouldn't want there.

Step 6: Turn on file creation

This lets Claude make real Word docs, PDFs, spreadsheets and slides, and it's required for Skills.

1. **Settings**, then **Capabilities**.
2. Turn on **Code execution and file creation** (newer layouts call it **Create and edit files**).

Step 7: Connect Gmail, Google Calendar and Google Drive

1. **Settings**, then **Connectors**.
2. Find Gmail and click **Connect**. Sign in to Google and allow access. Repeat for Google Calendar and Google Drive.
3. In any chat, click the **+** button, hover over **Connectors**, and make sure the ones you want are switched on.

What to know: Claude can search and read your email and create drafts, but it can't send email. You still hit send. It also can't open email attachments through the Gmail connector, so download the PDF and upload it when you need Claude to read one. Anthropic says it doesn't train its models on your Gmail, Calendar or Drive connector data.

On Outlook? Use the Microsoft 365 connector, or the Claude add-in for Outlook (in beta, paid plans).

Step 8 (optional): Install Claude in Chrome

This lets Claude read, click and fill in forms on websites you're signed in to. Paid plans only, Google Chrome only (not Edge, Brave or your phone).

1. Install the Claude extension from claude.com/chrome.
2. In Claude: **Settings**, then **Connectors**. Find **Claude in Chrome**, click **Configure**, and switch it on.
3. Read Play 6 before you hand it anything important.

Check yourself

- [ ] Paid plan (or decided to test on free first)
- [ ] Desktop and phone apps installed
- [ ] Privacy setting decided
- [ ] Instructions pasted
- [ ] Memory on
- [ ] File creation on
- [ ] Gmail, Calendar and Drive connected

- [ ] Chrome extension (optional)

Part 2: The building blocks

Claude isn't one tool. It's a handful of pieces that stack. Learn what each one is for and you'll know which to reach for.

PIECE	WHAT IT IS	USE IT WHEN	AGENT EXAMPLE
Chat	A conversation. Upload files, ask, get work back.	It's a one-time job.	"Summarize this inspection report."
Instructions and memory	Who you are and how you work, read before every chat.	Always. Set it once.	Claude already knows your market, voice and Fair Housing rules.
Projects	A workspace with its own instructions, files and chat history.	You keep coming back to the same deal, client or system.	One Project per active listing with the contract, disclosures and survey inside.
Skills	A saved how-to Claude pulls up on its own, in any chat.	You've figured out how you like a task done and want it done that way every time.	Your Listing Launch format, your CMA narrative style.
Connectors	Access to your Gmail, Calendar, Drive, CRM and more.	Claude needs your real data instead of what you paste.	"Find every email on 123 Oak and tell me what's still open."
Scheduled tasks	A prompt Claude runs on a schedule, even when your computer is asleep.	The same job happens every day or week.	Your morning brief at 6:30 AM, weekdays.
Claude in Chrome	Claude reads, clicks and fills in forms in your browser.	The info lives on a website with no connector.	Pull this weekend's open houses in a zip code into a table.

PIECE	WHAT IT IS	USE IT WHEN	AGENT EXAMPLE
Office add-ins	Claude inside Word, Excel, PowerPoint and Outlook.	You live in Microsoft 365.	Plain-English read of an addendum, right in Word.
Voice mode	Talk to Claude on your phone, hands-free.	You're driving between showings.	Debrief a listing appointment on the way back to the office.

Projects or Skills?

They sound alike. They're not.

A **Project** is a place. It holds the stuff for one thing: a listing, a client, your past-client system. Open it and Claude already has the files.

A **Skill** is a habit. It holds the how-to for one task, and it travels to every chat. Ask for a listing description anywhere and Claude uses your Listing Launch skill without being told.

Rule of thumb: if you're tired of re-uploading files, make a Project. If you're tired of re-explaining how you want something done, make a Skill.

How to make a Skill without writing one

1. Do the task in a chat until the result is exactly how you like it.
2. Type: "Turn what we just did into a skill called [name]. Include my format, my rules and one example."
3. Review what Claude drafts, then save it. You'll find your Skills under **Customize**, then **Skills** (older layouts: **Settings**, then **Capabilities**). You can switch any Skill on or off there.

Skills need file creation turned on (Setup, Step 6).

How to make a Project

1. Click **Projects** in the left sidebar, then **New project**.
2. Name it ("123 Oak St listing" or "Past Client Nurture").
3. Click **Set project instructions** and paste how Claude should work inside it.
4. Add files to the Project's knowledge: contracts, disclosures, your past emails, a client list export.
5. Every chat you start inside the Project already has all of it.

Part 3: Build your Second Brain

A Second Brain is one place that holds the truth about you and your business, and every AI tool you use reads from it. When a tool's memory disagrees with your Second Brain, the Second Brain wins.

Here's why I care about this. Not long ago I noticed ChatGPT had one version of me, Claude had another, and an old bio had a third. Different numbers, different titles, rules I'd changed long ago. Every tool was confidently wrong in its own way. So I built one source of truth and pointed everything at it. It's the single biggest upgrade I've made to how I use AI.

You don't need anything fancy. You need one place, kept current.

What goes in it

PAGE	WHAT GOES ON IT
Start Here	How it works, your rules of the road, quick facts, the page list
About Me	License, brokerage, market, niches, how long you've been licensed, bios, the production numbers you're allowed to say
Voice and Writing Rules	Words you use and never use, tone, sign-offs, three samples of your real writing
Compliance Rules	Fair Housing language rules, your brokerage's advertising rules, MLS rules, what needs broker approval
My Business	Your listing process, your buyer process, your pricing philosophy, what makes you different
People	Your lender, title partners, inspectors, transaction coordinator, vendors and how you work with each
Tools and Systems	CRM, MLS, transaction software, where files live. No passwords.
Active Projects	What you're building or working on now, with the next step
Update Log	A dated list of what changed and why
Inbox	New facts waiting to be added. AI tools add rows here instead of rewriting your pages.
Raw Transcripts	Your recorded trainings, podcasts and voice notes, waiting to be mined for new facts

What never goes in it: passwords, logins, Social Security numbers, account numbers, or your clients' private details.

Pick where it lives

OPTION	BEST FOR	HOW CLAUDE READS IT
A Claude Project	Starting today, no new apps	Upload the pages as Project knowledge. Re-upload when you change one.
Google Drive	Agents already in Google Workspace	One Google Doc per page in a "Second Brain" folder. Claude reads it through the Drive connector.
Notion	Anyone willing to learn one new app	One page per topic. Claude, ChatGPT and other tools read it through their Notion connectors.

My pick: Notion if you'll learn it, Google Drive if you already live there, a Claude Project if you want to start tonight. You can move later.

Build it in four moves

1. **Export what your tools already know.** In every AI tool you've used, run the export prompt below. No history? Use the interview prompt instead.
2. **Merge it.** Paste every export, your old bios and your brand kit into one chat with the merge prompt. Answer the questions it flags.
3. **Clean up.** Find old bios, saved prompts and templates with stale numbers or rules. Fix them or delete them so nothing contradicts your Second Brain.
4. **Point every tool at it.** Add the line below to your Claude Instructions and to any other AI tool you use.

Export prompt (run in each tool you've used):

```
Tell me everything you know or remember about me and my real estate business: my name, brokerage, market, niches, how I write, words I use or avoid, rules I've given you, people I work with, tools I use, and projects I've mentioned. Organize it by those headings. Mark anything you're unsure of as "to confirm." Don't invent anything.
```

Interview prompt (if you're starting from scratch):

```
Interview me to build my Second Brain as a real estate agent. Ask one question at a time. Cover: About Me, Voice and Writing Rules, Compliance Rules, My Business, People, Tools and Systems, and Active Projects. When I paste writing samples, pull out how I actually sound. When we're done, write each page as its own section I can copy into [Notion / a Google Doc / a Project file].
```

Merge prompt:

```
Below are exports from my AI tools, plus my old bios and notes. Merge them into one set of Second Brain pages using these headings: Start Here, About Me, Voice and Writing Rules, Compliance Rules, My Business, People, Tools and Systems, Active Projects. Where sources disagree, don't pick one. List the conflict under "Needs Me" so I can decide. Leave out passwords, account numbers and client private details.
```

The line for your Instructions:

```
My Second Brain in [Notion / Google Drive / this Project] is the source of truth about me and my business. Read it before writing anything in my name. If your memory conflicts with it, the Second Brain wins. When you learn something new and lasting about me, give me a one-line Inbox entry to add instead of assuming.
```

Keep it alive: the weekly review (30 minutes)

1. Add new transcripts and voice notes. Ask Claude to pull new facts from them into Inbox rows.
2. Go through the Inbox. Each row gets added, rejected or flagged for you to decide.
3. Check the numbers, titles and rules. Are they still right?
4. Ask Claude to read your sent email from the week: "Where does my real writing differ from my Voice page?"
5. Log what changed in the Update Log.

Nothing sexy. Nothing new. It's the habit that makes every other play in this guide work better.

Part 4: Twelve plays

Each play follows the same pattern: what it does, the level it needs, what you need, the steps, the prompt, and what to watch for. Start with Play 1. Then pick the one that saves you the most time this week.

Play 1: Teach Claude who you are

What it does: Gives Claude your market, your voice, your rules and your Fair Housing guardrails, so every answer starts closer to done. If you only do one play, do this one.

Level: Teach. **Time:** 20 minutes, once.

What you need: Three things you've written that sound like you (a listing description, an email to a client, a social post).

Steps:

1. Open a new chat and paste the interview prompt below.
2. Answer one question at a time. Paste your three writing samples when it asks.
3. Copy the profile it writes into **Settings**, then **Instructions** (Setup, Step 4).
4. Paste the Fair Housing block and the banned-words list under it.
5. Test it: ask for a listing description with and without the profile and compare.

The interview prompt:

```
Interview me one question at a time to build my agent profile for Claude.
Ask about: my name, brokerage and license; my market, neighborhoods and
price points; the clients I work with most; what makes me different; how I
like answers formatted; and words or phrases I never use. Then ask me to
paste three things I've written so you can learn how I actually sound. When
we're done, write a profile of about one page, in the second person ("You
are working with..."), that I can paste into my Instructions. Don't invent
anything I didn't tell you.
```

The Fair Housing block (paste under your profile):

```
Fair Housing: In any listing, ad, post, email or neighborhood content, describe the property, the features and the location, never the people who should live there. Don't use words like family-friendly, perfect for young couples, ideal for retirees, bachelor pad, safe neighborhood, exclusive, or walking distance to a house of worship. Present schools only as the factual district and school names with a link to the district, never as good or bad. Never steer. If anything I ask for could read as a preference for or against a protected class, flag it and suggest neutral wording.
```

The banned-words list (edit to taste):

```
Never use: stunning, nestled, boasts, must-see, won't last, dream home, pride of ownership, cozy (when it means small), turnkey (unless it is), a rare gem, priced to sell. No exclamation points in listing remarks. No emojis unless I ask.
```

What you'll see: Before, "Stunning 3/2 nestled in a desirable neighborhood, perfect for families!" After, "Three bedrooms, two baths and a screened lanai facing a retention pond, on a quarter acre with no rear neighbors. New roof in 2023. Ten minutes to I-295."

Watch for: Your profile is only as good as what you tell it. Update it when your market, brokerage or rules change. It belongs in your Second Brain (Part 3) too.

Play 2: Document Shred

What it does: Reads the whole HOA packet, inspection report, seller's disclosure, CDD document, survey or title commitment and hands back the red flags with page numbers. What used to take an hour of skimming takes five minutes of reviewing.

Level: Ask (better with Teach). **Time:** 5 minutes per document.

What you need: The document as a PDF. A Project for the listing or buyer is a bonus.

Steps:

1. Download the PDF. (The Gmail connector can see that an attachment exists but can't read inside it, so download it first.)
2. Open the listing's Project, or a new chat.
3. Drag the PDF in and paste the prompt below. Fill in the brackets.
4. Spot-check two or three of the page references yourself.
5. Ask for the client summary (second prompt).

The prompt:

```
I represent the [buyer / seller] on [address]. Attached is the [HOA packet / inspection report / seller's disclosure / CDD document]. Read all of it, not just the first pages. Give me:

1. The five things my client most needs to know, with page numbers.
2. Anything that could cost money in the next 12 months: assessments, fee increases, special assessments, repairs, CDD bond payments.
3. Rules that could block how my client plans to use the home: [rentals / short-term rentals / pets / vehicles / boats / fences / home business].
4. Anything missing, unsigned, expired or inconsistent.
5. Questions I should send to the [HOA / inspector / listing agent].

Quote the exact language for anything important. If something isn't in the document, say so. Don't guess.
```

The client summary:

```
Now write a plain-English summary for my client, under 200 words, at an
8th-grade reading level. No legal opinions. Tell them to read the full
document and to talk to [an attorney / the inspector / the HOA] about
anything that affects cost or use.
```

Florida examples worth trying: a CDD disclosure in a newer St. Johns County community, an HOA's rental restrictions before a buyer plans to lease, or a wind mitigation and 4-point inspection before the insurance quote comes back.

Watch for: This is a first pass, not legal advice. Claude can misread a scanned or blurry page, so verify anything that changes the deal. Client documents carry private information: check your privacy setting (Setup, Step 3) and your broker's AI policy before you upload.

Play 3: Listing Launch and photo audit

What it does: One prompt turns a new listing into every piece of launch marketing you need. A second prompt gives your listing photos a second set of eyes before they go live.

Level: Teach. **Time:** 10 minutes per listing, down from about 90.

What you need: The property facts, your listing notes, the photos. Your profile and Fair Housing block from Play 1.

Steps:

1. Create a Project for the listing (Part 2). Add the property details, your listing notes and any disclosures.
2. Run the Listing Launch prompt. Review every fact against your listing paperwork.
3. Upload your photos (batches of about 20 work well) and run the photo audit prompt.
4. Once the output is how you like it, say: "Turn this into a skill called Listing Launch." Next time, just say "Listing Launch for [address]" in any chat.

The Listing Launch prompt:

```
I just listed [address]. Facts: [beds, baths, square feet, lot, year built, upgrades with years, HOA or CDD fees, flood zone if known, price]. What sellers love about it: [your notes]. Target buyer: [describe the home's strengths, not the people].

Write:
1. MLS public remarks, under [your MLS character limit] characters.
2. An Instagram caption, 60 to 120 words.
3. A Facebook post for my sphere, 80 to 180 words.
4. A LinkedIn post for agents and referral partners.
5. A short email to my database announcing it.
6. A text I can send to buyer agents who've shown similar homes.
7. A thank-you note to the sellers for trusting me with the listing.
8. An open house invitation for [date and time].

Follow my Fair Housing rules and banned-words list. Use only the facts I gave you. If something important is missing, ask me instead of filling it in.
```

The photo audit prompt:

```
You're a listing photographer's second set of eyes. Review each photo for anything that hurts the listing: clutter, cords, open doors or cabinets, lights off, toilet seats up, personal photos, reflections of the photographer, crooked frames or blinds, wet spots, stains, visible damage. List fixes by photo number. Then recommend the order for the MLS with the strongest photo first, and tell me which shots are missing.
```

One broker who uses this caught an open laundry room door, a crooked outlet cover, a cord behind the TV, floor scratches and a fingerprint on the fridge before the photos went live (Neuhaus Realty).

Watch for: Verify every number: square footage, year built, fees, school names. Florida Realtors' outside counsel put it simply: never publish facts you don't know to be 100% true, and never alter an image in a way that would be deceptive (Florida Realtors). Disclose virtual staging and edited photos the way your MLS requires.

Play 4: The Morning Brief

What it does: Every weekday before you're up, Claude reads your calendar and last night's email, flags what's due, drafts your first replies, pulls the real estate news your clients care about, and writes a post idea. You open one summary with your coffee and know exactly where to start.

Level: Delegate. **Time:** 20 minutes to set up, then about a week of tuning.

What you need: A paid plan. Gmail and Google Calendar connected (Setup, Step 7). Your profile from Play 1.

Steps:

1. Open a new chat. Make sure Gmail and Calendar are switched on under **+**, then **Connectors**.
2. Paste the prompt below and fill in the brackets. Run it once by hand and read the result.
3. Fix what's off: "Skip newsletters." "Always flag anything from [TC's name]." "Shorter." Run it again.
4. When it's right, type: "Schedule this every weekday at 6:30 AM." Claude proposes the task name, schedule and instructions. Review them and click **Schedule**.
5. Find it under **Scheduled** in the left sidebar. Results show up there each morning.

Scheduled tasks run on Anthropic's servers, so they run even when your computer is asleep or the app is closed. They can use your connectors and files saved to your Claude account, but not a folder on your computer. Keep anything the brief needs (a buyer watchlist, your active deal list) in Google Drive.

The prompt:

```
Morning brief for [your name], [brokerage], [market]. Keep the whole brief
under 350 words. Scannable, no filler.

1. Today: Every calendar item with time, address and who it's with. Flag
double-bookings and tight drive times.

2. Inbox: Email from the last 24 hours (on Mondays, since Friday at 5 PM).
List client questions that need an answer today, deal deadlines
(inspection, appraisal, financing, title, HOA approval, closing), and new
leads or referrals. One line each: who, what they need, by when.

3. Deadline watch: Search my email for active contracts and list any
contract date in the next 7 days. If you can't confirm a date, say so.

4. Drafts: For the three most important items, create Gmail drafts in my
voice. Do not send anything.

5. Market pulse: Search for real estate and housing news from the last 24
hours in [your market] and Florida. Check [your local paper], [your local
business journal], [your Realtor association], Florida Realtors and Inman.
Give me the three stories my clients would care about, one line each, with
a link.

6. Post idea: For the best story, write a 60 to 100 word social post in my
voice that ends with a question. Follow my Fair Housing rules.

Never invent dates, numbers or names. If something is missing, say so.
```

Want more? Add sections once the basics work: "Leads I haven't touched in 7 days" (from email), "Birthdays and home anniversaries this week" (from a client sheet in Drive), "New listings that match my buyers" (from your MLS saved-search emails).

Watch for: Expect it to be noisy in week one, to miss something in week two, and to be dialed in by week three (Neuhaus Realty). The brief is only as good as your inbox. And drafts are drafts: you read and send every one.

Play 5: Your inbox and calendar assistant

What it does: The Morning Brief runs on a schedule. This is the same power on demand. Ask Claude where a deal stands, prep you for tomorrow's appointments, or line up every milestone email for a closing, all from your real email and calendar.

Level: Connect. **Time:** 2 minutes per ask.

What you need: Gmail and Google Calendar connected (Setup, Step 7). On Outlook, the Microsoft 365 connector or the Claude add-in for Outlook.

Steps: Open a chat, make sure the connectors are on, and use any of these.

Where does this deal stand?

```
Find every email about [address or client last name] from the last 30 days. Give me: where we are in the transaction, what's still open, who owes what to whom, and the next deadline. Then list any email I haven't answered.
```

Prep me for my appointments:

```
Look at my calendar for [tomorrow / this week]. For each appointment, build a prep sheet: who it's with, the property, everything relevant from my email history with them, and three questions I should ask. Flag anyone I haven't followed up with since our last meeting.
```

Milestone emails for a closing:

```
My buyer [name] is under contract on [address], closing [date]. Draft emails for each milestone: inspection scheduled, inspection response sent, appraisal ordered, appraisal back, clear to close, and closing day details. Keep each under 120 words, warm and clear. Save them as Gmail drafts with the subject lines filled in. I'll send each one when the time comes.
```

Find showing windows:

```
Find three open one-hour windows this Saturday between 9 AM and 4 PM, with 30 minutes of drive time around my other appointments. Draft a text to my buyer offering those times.
```

Clean up after a busy week:

```
Search my email from the last 14 days for anyone who asked me a question I never answered, and any lead I never replied to. List them with the date and what they asked.
```

Watch for: Claude can create drafts but can't send email. That's a feature. It also can't read attachments through Gmail, so download and upload PDFs when you need them read. Claude asks for your approval before it acts in your accounts, so read what you're approving.

Play 6: Claude in Chrome does the clicking

What it does: Claude works inside your Chrome browser, on sites you're already signed in to. It reads the page, clicks, scrolls, types and fills in forms while you watch, or in the background while you do something else. Anything you'd do by hand on a website with no connector, Claude can take a shot at.

Level: Delegate. **Time:** 10 minutes to install, then minutes per task.

What you need: A paid plan, Google Chrome on a computer, and the Claude extension (Setup, Step 8).

Steps:

1. Open Chrome and click the Claude icon to open the side panel.
2. Open a fresh tab for the job. Keep personal tabs out of it.
3. Paste a prompt. Watch the first run so you see how it works.
4. Tell Claude where to stop: before anything that submits, signs, pays, posts or sends.

Ideas that work well:

- **Weekend open house list:** gather this weekend's open houses in a zip code into one table with address, price, time and listing agent. Great for picking which to preview, or which listing agents to meet.
- **Property appraiser lookups:** pull owner-of-record name, assessed value, homestead status and sale history for a list of addresses from the county property appraiser site.
- **CMA prep:** collect the facts on six comps you've already picked and organize them into a table for your CMA narrative.
- **Repetitive forms:** fill the same fields into a showing request or vendor portal for a list of properties, stopping before submit.
- **Expired and FSBO research:** compile a list of public FSBO listings in your area with the details posted.

The open house prompt:

```
Open [site]. Search [zip code] for open houses this Saturday and Sunday. For each one, capture the address, list price, beds and baths, open house time, listing agent and brokerage. Put it all in a table sorted by time. Don't click anything that contacts an agent, registers, submits or signs up. If a site asks me to log in, stop and tell me.
```

The property appraiser prompt:

```
Go to the [county] Property Appraiser website. For each address below, look up the owner of record, assessed value, homestead exemption status, last sale date and price. Put the results in a table. If an address doesn't come up, note it and move on.

[paste addresses]
```

Watch for:

- **Read the site's rules.** Many websites, and most MLS systems, restrict automated access, scraping or copying data. Check your MLS rules and each site's terms before you point Claude at it.
- **Keep your hands on the wheel.** Claude acts as you on sites where you're signed in. Never let it submit an offer, sign a document, send a message to a client or pay anything without you.
- **Watch for odd instructions.** A web page can contain hidden text meant to trick an AI. If Claude suddenly wants to do something you didn't ask for, stop it. Anthropic's safety guide is at support.claude.com.
- **Privacy.** Don't run Chrome tasks in a browser window full of client portals you don't need for the job.

Play 7: Claude builds the thing

What it does: Claude doesn't just write about the thing. It makes it. A seller net sheet calculator you can text to a seller. A one-page property website. A buyer guide as a finished PDF. An open house flyer. A relocation one-pager. You describe it, Claude builds it, you share a link or download the file.

Level: Teach. **Time:** 15 to 30 minutes for your first build.

What you need: File creation turned on (Setup, Step 6). Your brand colors as hex codes and your logo file, if you have them.

Steps:

1. Describe what you want in plain English: who it's for, what goes in, what comes out, how it should look.
2. Claude builds it right in the chat so you can see it and click around.
3. Ask for changes in plain English: "Make the total bigger." "Add my headshot." "Use navy and gold."
4. When it's right, ask Claude to publish it as a page you can share with a link, or to download it as a PDF, Word file or PowerPoint.

Proof it works: I built a Florida Amendment 3 homestead savings calculator with Claude. Pick a county, it fills in the tax rate, and it shows the estimated savings. It's yours to use with clients. See Your giveaways at the end of this playbook.

The seller net sheet prompt:

```
Build me a seller net sheet calculator I can share with a link. Inputs: sale price, mortgage payoff, any second lien or HELOC payoff, listing brokerage commission (%), buyer brokerage compensation (% or $), seller-paid closing costs or concessions, title and settlement fees (a $ amount I enter), Florida deed documentary stamp tax (calculate at $0.70 per $100 of sale price, with an override field), HOA estoppel and transfer fees, repairs, and prorated property taxes (a $ amount I enter). Show each line and the estimated net to the seller in large type. Add a note at the bottom: "Estimate only. Not a closing statement. Your title company will provide final figures." Make it clean and easy to use on a phone, with my name, brokerage and phone number at the top. Colors: [hex codes].
```

More things to build:

```
Create a one-page website for [address] with a photo gallery, the property highlights, a map link, open house times and a button to text me. Follow my Fair Housing rules. Use only the facts I give you: [paste facts].
```

```
Turn my notes below into a 6-page first-time buyer guide as a PDF, in my brand colors, with my contact info on the last page. Plain English, 8th-grade reading level. [paste your notes or your current buyer presentation]
```

```
Make a letter-size open house flyer for [address] as a PDF with the hero photo, four highlights, the time and date, a QR code to the property page, and my contact info and brokerage name.
```

Watch for: Have your title company check the net sheet's assumptions for your county before you use it with a seller (doc stamp rates differ in Miami-Dade, and who customarily pays what varies). Florida advertising rules generally require your brokerage's licensed name on anything you advertise with, so put it on every flyer and page. Confirm the details with your broker.

Play 8: The past client nurture system

What it does: Your past clients are your cheapest source of business, and most agents go quiet on them after closing. This play builds a Project that knows your past clients and drafts personal touches in your voice: home anniversaries, check-ins, market updates for their neighborhood, holiday notes. You spend 15 minutes a week and send five real, personal messages.

Level: Teach (Connect if your list lives in Google Drive). **Time:** 30 minutes to set up, 15 minutes a week.

What you need: An export of your past clients from your CRM with only what you need: first name, property address, closing date, and a short note (how you met, what they cared about). Leave out financial details and anything private.

Steps:

1. Create a Project called **Past Client Nurture** (Part 2).
2. Paste the instructions below into **Set project instructions**.
3. Upload your client export, three of your best past-client emails or texts, and your current market stats.
4. Each week, open the Project and run the weekly prompt. Edit, personalize, send.

Project instructions:

```
You help me stay in touch with past clients in a way that feels personal, not like a drip campaign. Use my voice from the sample messages. Every message references something specific about that client or their home. No sales pitch, no "just checking in," no "if you know anyone looking to buy or sell." Keep texts under 50 words and emails under 120 words. Never state a home value. If I want to offer one, say "I'd be happy to run the numbers on your home." Follow my Fair Housing rules.
```

The weekly five:

```
From my client list, pick five people for this week: anyone with a home anniversary in the next 14 days first, then anyone I haven't contacted in the longest time. For each one, tell me why you picked them and draft a text or short email. Give me one idea for something useful I could send or drop off.
```

More prompts for the Project:

```
Write a short note to past clients in [neighborhood] about what's sold near them in the last 90 days, using these stats: [paste from MLS]. No price predictions.
```

```
Draft a home anniversary card for [name] at [address], closed [date]. Mention [detail from my notes]. Three sentences.
```

Watch for: You're uploading client names and addresses, so check your privacy settings and your broker's policy first. Only upload what the messages actually need. You send every message yourself. Fifteen minutes a week, every week, beats a three-hour blitz once a quarter.

Play 9: After the appointment

What it does: You walk out of a listing appointment or buyer consult with everything in your head. Instead of typing notes in the parking lot (or forgetting them), you talk to Claude on the drive back. It turns your debrief into a recap email, a CRM note and a task list before you're back at the office.

Level: Teach. **Time:** 3 minutes of talking.

What you need: The Claude phone app with voice mode, or the microphone button in any chat.

Steps:

1. Open the Claude app and start voice mode (or tap the microphone to dictate). Use your car's hands-free setup.
2. Talk it through: who, where, what they want, their timeline, concerns, what you promised.
3. When you're parked, open the chat and paste the prompt below.
4. Copy the CRM note into your CRM. Review the email before you send it.

The prompt:

```
From my debrief above, give me:
1. A recap email to [client name] thanking them, confirming what we
discussed and what happens next. Under 150 words, in my voice.
2. A CRM note: motivation, timeline, price expectations, decision makers,
concerns, next step and date.
3. My task list with due dates.
4. Anything I promised that I need to deliver, and anything I forgot to
ask.
```

Watch for: Debrief your own thoughts. Don't secretly record clients. Florida is an all-party consent state for recording private conversations, so get permission before you record anyone. Keep sensitive details (finances, health, family situations) out of the CRM note unless they truly matter to the deal.

Play 10: The roleplay coach

What it does: Practice the hard conversations before they cost you a listing. Claude plays the seller who thinks the house is worth $50,000 more, the buyer who wants to wait, or the FSBO who thinks agents are overpaid. Then it scores your answers and tells you what to fix.

Level: Ask. **Time:** 10 minutes.

What you need: Nothing. Voice mode makes it feel real.

The prompt:

```
Roleplay with me. You're a homeowner in [area] who [believes their home is worth $50,000 more than the comps support / is interviewing three agents / wants to sell FSBO to save the commission]. Push back the way a real person would. Don't make it easy. After each of my answers, step out of character and score me from 1 to 10 on clarity, empathy and confidence. Tell me one thing to change and give me a better line I could have used. Then step back in. Start now with your first objection.
```

Scenarios worth practicing:

- The price conversation with a seller anchored to a Zillow estimate.
- Explaining your buyer agreement and how you're paid, plainly and confidently.
- A buyer who wants to wait for rates to drop. (Talk about their plan, not a rate forecast.)
- An expired listing owner who's angry at their last agent.
- Delivering bad inspection news to a first-time buyer.

Watch for: Claude is a sparring partner, not a script. Practice until the words sound like you, then put the phone down and have the real conversation.

Play 11: The Conflict Check before closing

What it does: About ten days before closing, load every document in the file into one chat and ask Claude to find where they disagree. A misspelled name, a legal description that doesn't match the survey, a repair credit that never made it into an addendum, an HOA fee that doesn't match the estoppel. Catch it now, not at the closing table.

Level: Teach. **Time:** 10 minutes.

What you need: The executed contract and all addenda, the title commitment, the survey, the HOA estoppel or approval, the repair agreement, and anything else in the file, as PDFs.

Steps:

1. Open the deal's Project (or a new chat) and upload every document.
2. Run the prompt.
3. Send anything real to your title company or closing attorney the same day.

The prompt:

```
These are the documents for [address], closing [date]. Compare them against each other and list every inconsistency. Check: buyer and seller names and spellings, property address and legal description, parcel number, purchase price and deposits, closing date and every contract deadline, who pays which costs, repair credits and agreed repairs, items that convey, HOA or CDD fees and assessments, easements or encroachments on the survey versus the title commitment, and any title requirements that haven't been met. Show each issue in a table: what, which documents, page numbers, and who should fix it. If two documents agree, don't list them.
```

Watch for: You're not the closing attorney and neither is Claude. This is a second set of eyes, and anything it finds goes to the professionals handling the closing.

Play 12: Neighborhood guides and market updates

What it does: Two pieces of content every agent should be putting out and few have time for. A relocation guide for out-of-area buyers built from real research. And a monthly market update script built from your actual MLS numbers.

Level: Teach. **Time:** 20 minutes each.

What you need: Your Fair Housing block (Play 1). For market updates, your MLS stats for the area and month.

The relocation guide prompt:

```
Research and write a relocation guide for buyers moving to [area]. Cover: commute times to [major employers, bases, downtown, the airport], parks and recreation, shopping and dining, healthcare, flood zone and insurance basics with links to official tools, HOA and CDD basics, and the school district names with links to the district's own site. Describe places and facts, never the people who live there or who it's "perfect for." Cite your sources with links. Format it as a PDF with my contact info on the last page.
```

The market update prompt:

```
Here are this month's MLS stats for [area]: [paste median price, closed sales, new listings, days on market, months of supply, and the same month last year]. Write: a 60-second video script I can read on camera, a 120-word Facebook post, and a 3-sentence email blurb. State only what these numbers show. No predictions about prices or rates. End with an invitation to ask me what it means for their home.
```

Watch for: Use the numbers you pulled, never numbers Claude remembers. Check the school, flood zone and commute details yourself before a buyer relies on them. Describe the area, not the people.

Part 5: Guardrails

AI doesn't change who's responsible. You are. At the 2026 Florida Realtors convention, the message was that agents should stay the "human in the middle" and personally verify the final product (Florida Realtors).

The safer-use checklist from the Florida Real Estate Legal Summit: treat every output as a draft, verify property facts, disclose altered images, protect customer information, and adopt a written brokerage AI policy (Florida Realtors).

Before anything goes out

- [ ] Every fact checked: square footage, year built, fees, dates, names, school names.
- [ ] No language about who should live there. Property and location only.
- [ ] Edited or virtually staged photos disclosed the way your MLS requires.
- [ ] Brokerage name on all advertising, per Florida rules and your broker.
- [ ] No promises about value, appreciation or rates.
- [ ] It sounds like you, not like a robot.

Client information

- Turn off **Help improve Claude** if you'll upload client documents (Setup, Step 3).
- Only upload what the task needs. Redact Social Security numbers, account numbers and anything financial that isn't relevant.
- Never put client information in a tool your brokerage hasn't approved.
- Team plans and shared Projects: everyone in the Project can see what's in it.

Fair Housing

The Fair Housing Act applies to your advertising no matter who wrote the first draft. Keep the Fair Housing block from Play 1 in your Instructions, and read every listing, post and guide for words that describe people instead of the property. If you run ads, be careful with audience targeting tools too.

Recording

Florida requires consent from everyone in a private conversation before you record it. Debrief your own thoughts (Play 9). If you want to record a meeting, ask first and get the yes on the record.

Websites and the MLS

Before you use Claude in Chrome on a site, check its terms and your MLS rules on automated access and copying data. When in doubt, ask your MLS.

When Claude is wrong

It will be, sometimes. It can misread a scanned page or fill a gap with something that sounds right. Ask for page numbers and sources. Tell it "If you don't know, say so." And when it gets something wrong, correct it. If it's a lasting preference, add it to your Instructions or your Second Brain.

Part 6: Your 30-day rollout

One play a week. Get it running daily before you add the next one.

WEEK	DO THIS	YOU'LL HAVE
Week 1	Setup (Part 1) and Play 1. Run Document Shred (Play 2) on a real HOA packet or inspection report.	Claude knows who you are and has saved you an hour.
Week 2	Listing Launch (Play 3) on your next listing or a past one. Turn it into a Skill.	Launch marketing in minutes, the same way every time.
Week 3	Connect Gmail and Calendar. Set up the Morning Brief (Play 4) and tune it daily.	A brief waiting for you every weekday.
Week 4	Pick one: Second Brain (Part 3), past client nurture (Play 8), Chrome (Play 6), or build a tool (Play 7).	Your first real system.

After that: a 30-minute weekly review. Update your Second Brain, fix the prompts that missed, and pick the next play.

It's okay not to do all twelve. Do three of them every day and you'll be ahead of most of your market.

Quick prompt library

Short prompts for everyday jobs. Your profile from Play 1 does the heavy lifting, so these can stay short.

JOB	PROMPT
Rewrite an email	"Rewrite this so it's clear, warm and half as long. Keep my voice: [paste]"
Tough reply	"A client sent this. Draft a calm, professional reply that acknowledges their frustration and gives a next step: [paste]"
Explain it simply	"Explain [appraisal gap / escrow / CDD / wind mitigation] to a first-time buyer in 5 sentences."
Review response	"Draft a thank-you reply to this online review. Under 60 words. No client details: [paste]"
Bio	"Write a 75-word and a 150-word bio from my profile for [Zillow / my website / an event]."
Social calendar	"Plan 12 posts for next month for agents in [market]: 4 education, 4 local, 4 personal. One line each."
Price reduction talk	"Help me prepare for a price conversation with my seller. Here's the activity on the listing: [showings, feedback, days on market, competing listings]."
Offer comparison	"Compare these offers side by side in a table: price, financing, contingencies, timelines, net to seller. Flag the risks in each: [paste or upload]"
Vendor list	"Turn my notes into a one-page vendor list for new buyers: [paste names, trades, phone numbers]."
Meeting notes	"Turn these notes into a summary, decisions and action items with owners: [paste]"

JOB	PROMPT
Prompt fixer	"Here's a prompt I'm using and what I got back. Rewrite the prompt so I get [what you wanted]: [paste both]"
Second opinion	"What am I missing? Poke holes in this plan before I take it to my client: [paste]"

Troubleshooting and FAQ

It doesn't sound like me. Paste three things you've actually written into the chat and say "Match this voice." Then put those samples in your Instructions or your Second Brain.

It made something up. Ask for page numbers or sources, and add "If you don't know, say so" to your prompt. Facts it couldn't have known (fees, dates, square footage) should come from you.

I can't find a setting. Menus move as Claude updates. Search the setting's name at support.claude.com.

My connectors aren't working. In the chat, click **+**, then **Connectors**, and make sure the one you need is switched on. If it still fails, disconnect and reconnect it under **Settings**, then **Connectors**.

I hit my usage limit. Long chats with lots of files use more. Start a fresh chat for each job, and use Projects so you're not re-uploading. If you hit the limit several times a week, look at Max.

Free or paid? Free is fine for Plays 1, 2, 3 and 10. The rest need a paid plan.

I already use ChatGPT. Why switch? You don't have to pick one forever. Try the same task in both and keep what works. Your Second Brain (Part 3) keeps every tool on the same page.

Can my team share this? Yes. On a Team plan, you can share Projects and Skills so everyone uses the same Listing Launch format and the same Fair Housing rules.

Is my client data safe? Turn off model training, upload only what you need, and follow your broker's policy. See Part 5.

Your giveaways

The Florida Amendment 3 homestead savings calculator

I built this with Claude, and it's yours to share with buyers, sellers and past clients. Pick a Florida county, and it fills in that county's tax rate and shows the estimated homestead savings under Amendment 3.

Where it is: jasonkindler.com/tools/florida-homestead-tax-calculator

The facts behind it: Amendment 3 raises the homestead exemption for non-school property taxes to $150,000 in 2027 and $250,000 in 2028, replacing today's exemption of up to $51,411. The $25,000 school exemption stays the same. The first lower bill is the one that arrives in November 2027. Savings follow your county's tax rate, not how expensive your home is. New Florida residents get the larger exemption starting in year five. (Source)

Ways to use it:

- **Buyer consultations.** Show buyers what homestead could mean for their future tax bill, and remind them to file for homestead after closing.
- **Past client touch.** Send it with a two-line note: "Thought you'd want to see what Amendment 3 could save you on your home in [county]."
- **Listing appointments.** A useful talking point for sellers who are moving within Florida.
- **Social.** Post the link with a question: "Have you checked what Amendment 3 saves in your county?"

Keep it to facts. These are estimates based on 2025 county tax rates held flat, not a tax bill. Local governments set rates every year, and your August TRIM notice shows the real ones. Share the facts, skip the opinions.

Want one like it? Play 7 shows you how to build your own tool with Claude.

About and sources

Jason Kindler, President, First Coast Mortgage Funding. Originating since 2001. I use Claude every day to run my business, and I teach agents and loan officers to do the same. Questions about anything in this playbook, or want help setting it up? Call or text 904-734-3255, email jkindler@firstcoastmtg.com, or visit jasonkindler.com.

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Claude features, menus and prices change often. Everything here was checked as of November 12, 2026.

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