

AI for Property Management: Practical Foundations Workshop

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Session Goal

Workshop Objective

Give property management teams a practical and effective foundation that improves output quality immediately and sets the stage for follow-on workflow build-outs.

Key Outcomes

- Understanding of AI vs AI Agents
- Proper ChatGPT setup and configuration
- Custom instructions and project organization
- Template library for team scaling
- Success metrics and ROI tracking



Why Listen to Me About AI in Commercial Real Estate?

Academic Foundation

- Ph.D. in Finance, Florida State University
- Assistant Professor, University of Tulsa Collins College of Business
- Co-founder, Agentic Assets (PhD-led AI consulting firm)

Research & Publications

- 5 peer-reviewed publications in top finance/real estate journals
- "Optimizing Real Estate Portfolios: The Role of Generative AI" (*JREPM*, 2025)
- Multiple manuscript awards, American Real Estate Society (2024)
- Best Paper Award, Afrimed Finance Society (2024)

AI Implementation

- Building "Orbis" - Real Estate AI agent with 50,000+ academic papers
- Created [REITfactors.ai](https://reitfactors.ai) - AI-powered REIT analytics
- Direct experience with property management AI integration
- Bridging academic AI research with industry applications

Approach

Combining rigorous academic research with practical AI implementation in real estate markets



Industry Context: AI in Corporate Real Estate

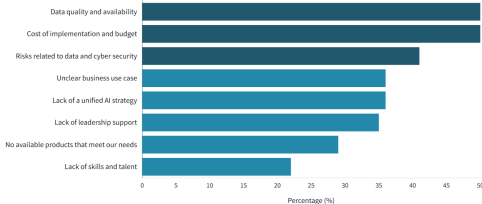
90% of organizations will accelerate investment in AI over the next 5 years



Source: JLL Research, 2024

Source: JLL Research, 2024

Barriers to CRE AI adoption



Source: JLL Research, 2024

Source: JLL Research, 2024



AI – in Plain English

Artificial Intelligence

Systems that learn from data to perceive, reason and act with minimal human direction—covering machine learning, NLP, computer vision and more (EY Standard for Trustworthy AI, 2024).

- **Three things to remember**

- 1 It trains on *data*—not hand-written rules
- 2 It gets better the more feedback you give it
- 3 It works fast and at huge scale, but still needs your judgment

- **What it's not**

- ▶ A thinking robot—it crunches numbers, it doesn't "feel"
- ▶ A magic wand—poor data ⇒ poor results



AI vs AI Agents: Understanding the Difference

Traditional AI

- Responds to queries reactively
- Single-turn conversations
- Requires constant human guidance
- Limited to analysis and suggestions
- ChatGPT, Claude, Gemini (current versions)

AI Agents (Next Generation)

- Takes autonomous actions
- Multi-step workflows and planning
- Executes tasks independently
- Creates and manages complex processes
- Orbus, Devin, AutoGPT (emerging)

Property Management Context

Today: AI helps draft emails and analyze data

Tomorrow: AI manages tenant relationships and coordinates maintenance

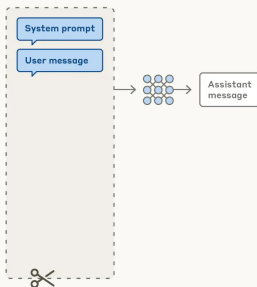


Prompt Engineering vs Context Engineering

Prompt engineering vs. context engineering

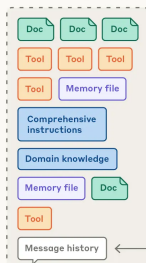
Prompt engineering for single turn queries

Context window

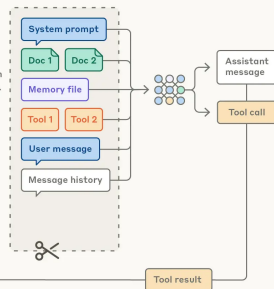


Context engineering for agents

Possible context to give model



Context window

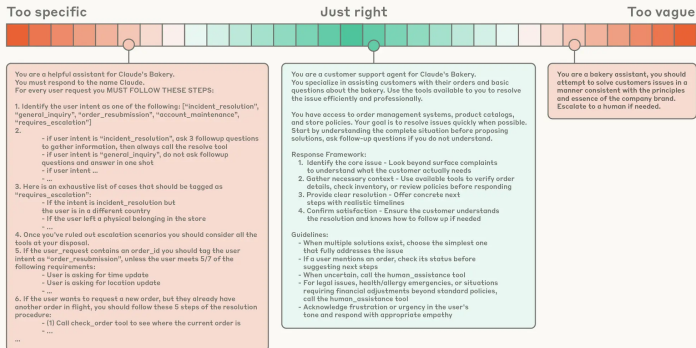


Source: Context Engineering Framework (2025)



The Anatomy of Effective Context

Calibrating the system prompt



Source: Effective Context Design Principles (2025)



Custom Instructions: Your AI Foundation

What are Custom Instructions?

- Permanent personality and behavior settings
- Applied to every conversation automatically
- Defines your role, expertise, and communication style
- Critical for consistent, professional outputs

Four Key Components

- **Background Context:** Who you are and what you do
- **Response Guidelines:** How you want AI to respond
- **Communication Style:** Tone and format preferences
- **Industry Knowledge:** CRE terminology and practices

Property Management Example

Background: I am a property manager at Paine CRE managing office and retail properties in Tulsa...



ChatGPT Account Tiers and Features

	Free	Plus	Pro	Team	Enterprise
Priority Supp	✗	✗	✗	✓ Yes	✓ Yes
Data Retention	✗	✗	✗	✗	✓ Yes
Admin Control	✗	✗	✗	~ Basic	✓ Advanced
SSO	✗	✗	✗	✓ Yes	✓ Yes
API Access	✗	✗	✗	~ Limited	✓ Full
Data Analysis	✗	✓ Yes	✓ Yes	✓ Yes	✓+ Yes+
Custom GPTs	~ Use Only	✓ Create	✓ Create	✓ Create	✓+ Create+
Deep Research	~ 5/mo	✓ 10/mo	✓+ 120/mo	✓ 10/mo	✓ Custom
Web Search	~ Limited	✓ Full	✓ Full	✓ Full	✓ Full
Voice Mode	~ Basic	✓ Advanced	✓ Advanced	✓ Advanced	✓ Advanced
Canvas	~ Limited	✓ Full	✓ Full	✓ Full	✓ Full
Memory	~ Basic	✓ Full	✓ Full	✓ Full	✓+ Full+
Projects	✓ Yes	✓ Yes	✓ Yes	✓+ Yes+	✓+ Yes+
Custom Instruct	✓ Yes	✓ Yes	✓ Yes	✓ Yes	✓ Yes
GPT-5 Access	~ Limited	✓ Full	✓+ Full+	✓ Full	✓+ Full+

Feature Level

✓+ Premium

✓ Full

~ Partial

✗ None

Source: OpenAI ChatGPT Feature Comparison (2025)



Projects: Organizing Your AI Work

What are Projects?

- Organized workspaces for specific workflows
- Persistent context across conversations
- File storage and reference materials
- Custom instructions per project

Paine CRE Project Types

- **Tenant Services:** Communication and issue resolution
- **Maintenance Coordination:** Work orders and vendor management
- **Lease Administration:** Document management and compliance
- **Market Intelligence:** Research and competitive analysis

Implementation Tip

Start with one project type, master it, then expand to others



Advanced Tools and Capabilities

Research Tools

- **Web Search:** Real-time market data and research
- **Deep Research:** Comprehensive analysis and synthesis
- **Document Analysis:** PDF and file content extraction
- **Data Analysis:** Excel/CSV processing and visualization

Integration Capabilities

- **Google Drive:** Seamless file access and storage
- **Gmail:** Email drafting and management
- **Calendar:** Meeting scheduling and coordination
- **CRM Integration:** Client data and relationship management

Property Management Applications

Market research, lease analysis, tenant communication, maintenance coordination



Building Team Templates and Libraries

Template Library Benefits

- Consistent quality across all team members
- Faster response times for common tasks
- Reduced training time for new employees
- Scalable processes as team grows

Paine CRE Template Categories

- **Tenant Communications:** Welcome letters, renewal notices
- **Maintenance Responses:** Work order acknowledgments, completion notices
- **Lease Documents:** Amendment templates, compliance checklists
- **Market Reports:** Research summaries, investment analyses

Implementation Strategy

Create templates for 80% of daily tasks, customize for 20



Success Metrics and ROI Tracking

Key Performance Indicators

- **Response Time:** Tenant inquiry resolution speed
- **Quality Consistency:** Professional communication standards
- **Administrative Efficiency:** Time savings on routine tasks
- **Error Reduction:** Accuracy improvements in documentation

Expected Outcomes

- **Short-term (1-3 months):** 25-40
- **Medium-term (3-6 months):** Improved tenant satisfaction scores
- **Long-term (6-12 months):** Enhanced competitive positioning
- **ROI:** 300%+ return through efficiency gains

Measurement Framework

Track baseline metrics before implementation, measure improvements quarterly



Implementation Roadmap

- 1 **Week 1:** Set up custom instructions and first project
- 2 **Weeks 2-4:** Test 5-10 common prompts, document successes
- 3 **Month 1:** Build team template library with 10+ reusable prompts
- 4 **Months 2-3:** Integrate with 2+ existing workflows
- 5 **Month 3+:** Achieve ≥50% team adoption rate

Quick Wins to Start

Draft tenant emails, triage maintenance requests, summarize lease terms



Agentic Assets Strategic Engagement Paths

Solution Studio (High-Touch Consulting)

- Rapid pilot implementations
- Custom workflow development
- Integration with existing systems
- Change management support

Agent Library (Agent-as-a-Service Platform)

- Standardized agents for common tasks
- Lease analysis and tenant onboarding
- Maintenance tracking and coordination
- Scalable subscription model

Typical Progression

Foundation Workshop → Prompt Library Development → Pilot Implementation → Scaled Adoption



Workshop Resources and Support

Immediate Resources

- Custom instructions templates
- Project setup guides
- 6+ ready-to-use prompts

Ongoing Support

- Template library expansion
- Advanced training workshops
- Custom GPT development
- ROI measurement and optimization

Contact Information

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Q&A and Next Steps

Questions?

What specific workflows would you like to automate first?

Workshop Deliverables

- Complete presentation slides
- Custom instructions templates
- Project setup guides
- Success metrics tracking framework
- 6+ ready-to-use prompts

Thank you for your attention!

