Driving ROI in Real Estate with AI Workflows (120 min)

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Training Structure

Session Goal: Build repeatable, efficient, and scalable processes for individuals and teams that directly enhance profitability, reduce friction, and create long-term competitive advantage across residential and commercial real estate operations.

Agenda (120 min):

1. **Executive context (20 min):**

   - Defining ROI in AI: Time saved vs. Deal velocity vs. Quality improvement
   - The "Workflow" Concept: Chaining multiple AI tasks together for complete outcomes
   - Buy vs. Build: When to use custom workflows vs. off-the-shelf software
   - Safe usage: Quality Control (QC) checkpoints in automated workflows

2. **Setup for performance (25 min):**

   - Process Mapping: Identifying bottlenecks in your Deal Cycle (Lead -> Close)
   - "Standard Operating Procedures" (SOPs) as Prompt Chains
   - Building a "Context Library": Storing team bios, past deal examples, and brand voice guidelines for consistent output
   - Integrating AI into everyday business tasks without over-engineering

3. **Advanced usage (30 min):**

   - **Deal Sourcing**: Automating the "first pass" review of listings and leads
   - **Transaction Management**: AI workflows for contract review, due diligence checklists, and timeline management
   - **Marketing & Client Experience**: Personalizing outreach at scale (e.g., "Just Sold" campaigns that sound human)
   - **Operations**: Streamlining tenant communications, vendor coordination, and property management tasks

4. **Guided practice & implementation (45 min):**

   - Working through real-world AI use cases together via guided examples
   - Using example documents to help set up personalized projects and custom instructions
   - Next steps for staying up-to-date and continuing education

Participant prerequisites:

- Laptop + stable Wi-Fi on-site

- A basic account already set up on at least one LLM platform (e.g., ChatGPT / Claude). A Pro-tier subscription is *not* required for this workshop.
- Example documents (leases, contracts, market data): We will provide some examples, but it is highly beneficial to bring 2-3 of your own documents related to a project you are currently working on where you need AI assistance.