



Becoming a Data Driven Real Estate Decision Maker with AI (120 min)

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Training Structure

Session Goal: Empower individuals and teams to integrate data analytics and AI-enhanced insights directly into their investment, valuation, and strategic planning processes, enabling faster and sharper decisions across both residential and commercial sectors.

Agenda (120 min):

1. Executive context (20 min):

- The "Data-Driven" mindset in Real Estate: Moving beyond gut feel
- The Data Hierarchy: Public records, MLS data, and proprietary firm data
- AI as your Analyst: Capability to clean, structure, and interpret messy real estate data
- Safe usage in Data Analysis:
 - Verification of sources; spotting "hallucinations" in math
 - Data privacy: processing client financial data securely

2. Setup for performance (25 min):

- Data Ingestion Techniques:
 - Uploading spreadsheets (Excel/CSV) and PDFs (OMs, inspection reports)
- Using Advanced Data Analysis tools (e.g., ChatGPT Data Analyst, Claude Artifacts)
- Structuring the Unstructured: Converting loose client notes or emails into structured tables
- Evaluation Mindset: "Does this trendline make sense?" (Human-in-the-loop validation)

3. Advanced usage (30 min):

- **Market Analysis:** Generating hyper-local market reports from raw sales data
- **Valuation & Underwriting:** Automating the "napkin math" to pro-forma workflow
- **Predictive Insights:** Identifying high-probability sellers or off-market opportunities (Residential & Commercial examples)
- **Visualizing the Story:** Asking AI to create charts, graphs, and dashboards for client presentations

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.
- **Sample datasets** (Excel/CSV export of sales comps, rent roll, or operating expenses): We will provide some examples, but it is highly beneficial to bring 2-3 of your own datasets related to a project you are currently working on where you need AI assistance.