AI CONTRACT REVIEW & TRANSACTION AUTOMATION

COMPLETE IMPLEMENTATION WORKBOOK

Edmund's Mastermind Session
Wednesday, February 18th, 2026
9:00 AM EST

EDMUND'S MASTERMIND
& GROUP COACHING

more efficiently—they do NOT replace the need for proper legal counsel. Always consult with a licensed attorney for legal matters.

YOUR MONEY-MAKING MISSION

WHY YOU'RE HERE

To stop trading your most valuable hours for paperwork that AI can handle better, faster, and without the errors that cost you deals and create liability.

YOUR GOAL TODAY

Master four AI-powered systems that will transform how you handle contracts, deadlines, client communication, and document management—reclaiming 5-10 hours per transaction.

SUCCESS METRIC

Within 30 days: Process your next transaction using these systems and document at least 5 hours saved compared to your previous workflow.

REMINDER: These systems are designed to make you more efficient and aware—NOT to replace legal counsel. AI is your "second set of eyes," not your attorney. When in doubt, consult a licensed professional.

WORKSHOP OVERVIEW: YOUR PROFIT-PROTECTING TOOLKIT

The 4 Transaction-Dominating Systems You'll Master:

1. "THE RISK RADAR" - AI CONTRACT REVIEW PROTOCOL

Analyze contracts for red flags, missing clauses, and unusual terms in minutes instead of hours. Your AI-powered second set of eyes that catches what you might miss.

2. "THE NEVER-MISS ENGINE" - DEADLINE AUTOMATION SYSTEM

Track every critical date automatically with proactive reminders. Never lose a deal because something "slipped through the cracks" again.

3. "THE CLIENT WHISPERER" - COMMUNICATION AUTOPILOT

AI-generated updates at every transaction milestone. Keep all parties informed without typing a single manual message.

4. "THE DOCUMENT COMMAND CENTER" - INTELLIGENCE & PLANNING SYSTEM

Handle the VOLUME of transaction documents with organization systems that find any file in seconds and ensure nothing gets lost.

SYSTEM 1: AI CONTRACT REVIEW PROTOCOL

"The Risk Radar"

WHAT THIS MEANS FOR YOUR BUSINESS:

- Review any contract in 5-10 minutes instead of 1-2 hours
- Catch red flags and unusual terms you might otherwise miss
- Know exactly when to escalate to an attorney (saving legal fees on routine reviews)
- Protect yourself from liability by having documented AI analysis

The Technology Behind Your Protection

Modern AI language models can read and analyze contracts with remarkable accuracy. They excel at:

- **Pattern recognition:** Identifying clauses that deviate from standard language
- **Completeness checking:** Flagging when typical protections are missing
- **Timeline extraction:** Pulling every date and deadline into a clear list
- **Risk identification:** Highlighting terms that could create problems

Why This Changes Everything

Most agents skim contracts looking for the big items—price, closing date, contingencies. But deals die in the details: unusual liability clauses, missing disclosures, conflicting terms, unrealistic timelines. AI doesn't skim. It reads every word, every time.

The competitive advantage: Agents using AI contract review catch issues BEFORE they become problems. They negotiate from strength because they understand every term. They protect their clients better—and that reputation builds referrals.

> **CRITICAL DISCLAIMER:** AI contract review is a TOOL, not a replacement for legal expertise. Use it as your "second set of eyes" to identify areas that need attention. For any legal questions, concerns about specific clauses, or situations with significant liability, ALWAYS consult a licensed attorney. We are NOT providing legal advice.

Real Revenue Applications

- Pre-signing review of listing agreements to ensure your interests are protected

- Purchase agreement analysis before presenting to clients

- Addendum review to catch conflicting terms

- Disclosure document completeness checks

- Lease agreement analysis for investor clients

- HOA document summary for buyer understanding

SYSTEM 1: CONTRACT REVIEW PROMPTS

Copy these prompts directly into ChatGPT, Claude, or your preferred AI assistant. Paste contract text after the prompt.

GENERAL CONTRACT REVIEW:

```
Review this real estate contract and provide:
1. A plain-English summary of the key terms (price, dates, parties,
property)
2. Any clauses that deviate from standard real estate contract language
3. Missing protections or clauses that are typically included
4. Potential red flags or areas of concern
5. Questions I should ask before signing

Format your response with clear headings for each section.

CONTRACT TEXT:
[Paste contract here]
```

RED FLAG IDENTIFICATION:

```
Analyze this contract specifically for red flags and risks:
1. Unusual liability clauses that shift risk to one party
2. Vague language that could be interpreted multiple ways
3. Missing standard protections (contingencies, disclosures, warranties)
4. Unrealistic timelines or deadlines
5. Penalty clauses or automatic provisions
6. Anything that seems "off" compared to standard contracts

Rate each finding as HIGH/MEDIUM/LOW risk and explain why.

CONTRACT TEXT:
[Paste contract here]
```

TIMELINE & DEADLINE EXTRACTION:

```
Extract ALL dates and deadlines from this contract:
1. List every specific date mentioned
2. List every deadline or timeframe (e.g., "within 10 days")
3. Calculate actual dates if timeframes are relative to signing/acceptance
4. Flag any conflicting dates or impossible timelines
5. Create a chronological timeline of all obligations

Format as a table with: Date | Deadline Description | Responsible Party |
Consequence if Missed

CONTRACT TEXT:
[Paste contract here]
```

CONTINGENCY ANALYSIS:

```
Analyze all contingencies in this contract:
1. List each contingency with its exact terms and timeline
2. Identify what triggers contingency removal
3. Note what happens if contingency is not satisfied
4. Flag any contingencies that seem unusually short or restrictive
5. Identify standard contingencies that are MISSING
6. Explain the risk of each missing contingency

CONTRACT TEXT:
[Paste contract here]
```

SYSTEM 1: ADDITIONAL PROMPTS & NOTES

DISCLOSURE DOCUMENT CHECK:

```
Review these disclosure documents for completeness:
1. Are all required sections filled out (not left blank)?
2. Are there any inconsistencies between what's disclosed and other
documents?
3. What follow-up questions should I ask about vague disclosures?
4. Are there any red flags that warrant further investigation?
5. What should I advise my client to verify independently?

DISCLOSURE DOCUMENTS:
[Paste disclosure text here]
```

ADDENDUM CONFLICT CHECK:

```
Compare this addendum to the original contract:
1. What terms does this addendum change or override?
2. Are there any conflicts between the addendum and original contract?
3. Does the addendum favor one party over another?
4. Are there any unintended consequences of these changes?
5. What's missing that should be addressed?

ORIGINAL CONTRACT:
[Paste original]

ADDENDUM:
[Paste addendum]
```

Contract Review Success Notes

During the live demo, write down insights for your business:

TYPES OF CONTRACTS I REVIEW MOST OFTEN:

_____

_____

RED FLAGS I'VE MISSED IN THE PAST THAT AI COULD CATCH:

_____

_____

HOW I'LL INTEGRATE AI REVIEW INTO MY WORKFLOW:

_____

_____

QUESTIONS TO ASK DURING Q&A:

_____

_____

REMEMBER: Document your AI-assisted reviews. If you identify concerns, escalate to a licensed attorney. These prompts help you ASK better questions—they don't provide legal answers.

SYSTEM 2: DEADLINE AUTOMATION ENGINE

"The Never-Miss Engine"

WHAT THIS MEANS FOR YOUR BUSINESS:

- Never miss another deadline—inspection periods, financing contingencies, closing dates
- Automatic reminders BEFORE deadlines, not panicked scrambles after
- Handle multiple transactions simultaneously without confusion
- Protect your commission by preventing deadline-related deal deaths

The Psychology of Deadline Management

Studies show that real estate professionals miss an average of 2-3 minor deadlines per transaction when relying on manual tracking. Most of these don't kill deals—but they create stress, damage client relationships, and occasionally result in catastrophic failures that cost thousands.

The problem isn't that you're careless. The problem is that human brains aren't designed to track dozens of dates across multiple transactions while also prospecting, showing homes, and managing a business.

Why Automation Changes Everything

AI can extract every deadline from your contracts and create a complete tracking system in minutes. Combined with simple automation tools (Google Calendar, spreadsheet triggers, or dedicated apps), you build a system that:

- **Thinks ahead:** Reminds you 7 days, 3 days, and 1 day before deadlines
- **Knows dependencies:** Alerts you when one deadline affects another
- **Tracks responsibility:** Shows who needs to act and when
- **Prevents surprises:** Nothing "sneaks up" on you again

The Real Cost of Missed Deadlines

- **Missed inspection deadline:** Buyer loses negotiating power or right to cancel
- **Missed financing contingency:** Buyer at risk of losing earnest money
- **Missed disclosure deadline:** Potential legal liability for seller
- **Missed closing date:** Per-diem penalties, rate lock expirations, angry clients

Every missed deadline erodes trust. Every saved deadline builds your reputation.

Your Deadline Automation Stack

- **AI extraction:** Pull all dates from contracts automatically
- **Calendar integration:** Push deadlines to Google/Outlook with reminders
- **Spreadsheet tracking:** Master view of all transactions and deadlines
- **Notification system:** Email/text alerts at key intervals

SYSTEM 2: DEADLINE AUTOMATION PROMPTS

MASTER DEADLINE EXTRACTION:

```
Extract every deadline and time-sensitive item from this contract:

1. List ALL specific dates mentioned
2. List ALL relative deadlines (e.g., "within 10 days of acceptance")
3. For relative deadlines, calculate actual dates assuming acceptance date
of [DATE]
4. Identify which party is responsible for each deadline
5. Note the consequence of missing each deadline
6. Flag any deadlines that depend on other deadlines being met first

Format as a table: Deadline Date | Description | Responsible Party | Days
Until | Consequence | Dependencies

CONTRACT TEXT:
[Paste contract here]
```

CALENDAR EVENT GENERATOR:

```
Based on these contract deadlines, create calendar events with reminders:

For each deadline, provide:
1. Event title (clear and specific)
2. Event date and time
3. Reminder schedule (7 days before, 3 days before, 1 day before)
4. Event description with action required
5. Property address for reference

Format so I can copy directly into Google Calendar or Outlook.

DEADLINES:
[Paste extracted deadlines here]
```

DEADLINE CONFLICT CHECK:

```
Review these transaction deadlines for potential conflicts:

1. Are any deadlines unrealistically close together?
2. Do any deadlines conflict with weekends/holidays?
3. Are there dependencies where one deadline can't be met if another is
delayed?
4. Which deadlines have the least buffer time (highest risk)?
5. What's the critical path—which deadlines absolutely cannot slip?

Provide recommendations for managing high-risk deadlines.

TRANSACTION DEADLINES:
[Paste deadlines here]
```

Deadline Tracking Setup Notes

MY CURRENT DEADLINE TRACKING METHOD:

_____

DEADLINES I'VE NEARLY MISSED OR MISSED IN THE PAST:

_____

_____

TOOLS I'LL USE FOR AUTOMATION (CALENDAR, SPREADSHEET, APP):

_____

MY REMINDER SCHEDULE WILL BE:

_____ days before, _____ days before, _____ day before

SYSTEM 3: CLIENT COMMUNICATION AUTOPILOT

"The Client Whisperer"

WHAT THIS MEANS FOR YOUR BUSINESS:

- Clients feel informed and cared for at every stage—without you typing updates manually
- Reduce "what's happening?" calls by 80% with proactive communication
- Build a 5-star reputation that generates referrals automatically
- Handle more transactions without communication quality suffering

The Communication Gap That Costs You Referrals

Research consistently shows that the #1 complaint about real estate agents is poor communication. Clients don't expect instant responses—they expect to know what's happening with their transaction. When they have to ASK for updates, you've already failed.

The challenge: You're juggling multiple transactions, showings, prospecting, and life. Personalized updates for every client at every milestone feels impossible. So updates slip, clients worry, and your referral potential drops.

Why Automated Communication Wins

AI can generate personalized, professional updates at every transaction milestone:

- **Contract accepted:** Welcome and next steps
- **Inspection scheduled:** What to expect
- **Inspection complete:** Summary and negotiations
- **Appraisal ordered/complete:** Status and implications
- **Clear to close:** Final steps and preparation
- **Closing day:** What to bring and expect
- **Post-closing:** Congratulations and referral request

Each message is personalized with property details, client names, and specific dates—but generated in seconds, not typed manually.

The Referral Multiplication Effect

Clients who receive proactive communication throughout their transaction are:

- **3x more likely** to leave a 5-star review

- **4x more likely** to refer friends and family

- **5x more likely** to use you for their next transaction

Automated doesn't mean impersonal. It means consistent.

SYSTEM 3: CLIENT COMMUNICATION PROMPTS

CONTRACT ACCEPTANCE UPDATE:

```
Write a warm, professional email to my buyer client informing them their
offer was accepted. Include:
- Congratulations and excitement
- Brief summary of the agreed terms
- Next immediate steps (earnest money, inspection scheduling)
- Timeline of key dates coming up
- Reassurance that I'll guide them through every step

Client name: [NAME]
Property address: [ADDRESS]
Purchase price: [PRICE]
Closing date: [DATE]
Inspection deadline: [DATE]

Keep it warm but professional. 150-200 words.
```

INSPECTION COMPLETE UPDATE:

```
Write an email updating my buyer client after their home inspection.
Include:
- Summary of the inspection (general condition)
- Key items found that we may want to address
- Our options: request repairs, credit, or accept as-is
- What I recommend as next steps
- Timeline for making decisions

Client name: [NAME]
Property address: [ADDRESS]
Inspector findings summary: [BRIEF SUMMARY]
Repair request deadline: [DATE]

Professional but reassuring tone. 150-200 words.
```

CLEAR TO CLOSE UPDATE:

```
Write an excited email to my buyer client informing them we're clear to
close. Include:
- Celebration of reaching this milestone
- What "clear to close" means
- What happens between now and closing
- What they need to bring to closing
- Final walkthrough scheduling
- Contact info for any questions

Client name: [NAME]
Property address: [ADDRESS]
Closing date: [DATE]
Closing location: [LOCATION]

Celebratory but informative. 150-200 words.
```

WEEKLY STATUS UPDATE TEMPLATE:

```
Create a weekly transaction status update email template that includes:
- Current stage of the transaction
- What was accomplished this week
- What's happening next week
- Any action items needed from the client
- Upcoming deadlines to be aware of
- Reassurance and availability

Make it a template with [BRACKETS] for customizable fields.
Keep it scannable with bullet points. 100-150 words.
```

SYSTEM 3: ADDITIONAL PROMPTS & NOTES

POST-CLOSING REFERRAL REQUEST:

```
Write a post-closing email to my client that:
- Congratulates them on their new home
- Thanks them for trusting me with this important transaction
- Offers continued support (utility transfers, contractor referrals, etc.)
- Gently asks for a review/testimonial
- Mentions I'm always available for referrals to friends/family

Client name: [NAME]
Property address: [ADDRESS]
Anything special about their transaction: [NOTES]

Warm, grateful, not pushy. 150 words max.
```

TEXT MESSAGE SEQUENCE GENERATOR:

```
Create a series of brief text messages for key transaction milestones:
1. Offer submitted
2. Offer accepted
3. Inspection scheduled
4. Inspection complete
5. Appraisal ordered
6. Appraisal complete
7. Clear to close
8. Closing reminder (day before)
9. Congratulations (closing day)

Each text should be under 160 characters, professional but friendly.
Include [BRACKETS] for customizable details.
```

Communication Autopilot Setup Notes

TRANSACTION MILESTONES I WANT TO AUTOMATE UPDATES FOR:

_____

_____

MY PREFERRED COMMUNICATION CHANNELS (EMAIL, TEXT, BOTH):

_____

MY COMMUNICATION TONE PREFERENCES:

_____

TOOLS I'LL USE TO SEND AUTOMATED UPDATES:

_____

CLIENT FEEDBACK I WANT TO INCORPORATE:

_____

_____

SYSTEM 4: DOCUMENT INTELLIGENCE SYSTEM

"The Document Command Center"

WHAT THIS MEANS FOR YOUR BUSINESS:

- Find any document in seconds—no more digging through email chains
- Handle HIGH VOLUME of documents without drowning in chaos
- Know exactly what you have and what's missing for every transaction
- Scale your business without your document system breaking

The Document Volume Problem

A single real estate transaction can generate 50-100+ documents: contracts, addendums, disclosures, inspection reports, appraisals, lender documents, title documents, HOA documents, and more. Multiply that by your transaction volume, and you're managing hundreds or thousands of documents per year.

Without a system: Documents live in email attachments, random desktop folders, text messages, and your memory. Finding the right version of the right document becomes a daily frustration.

The Document Planning System Foundation

Before you can leverage AI for document intelligence, you need a planning system. This is the organizational structure that makes everything else work:
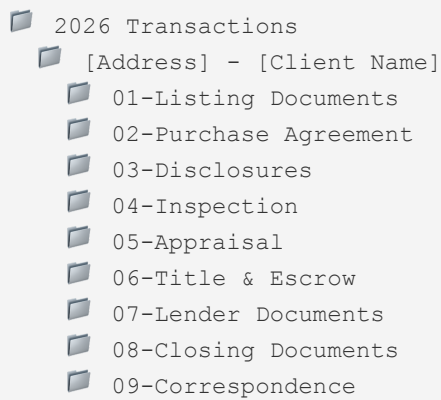
THE 3 PILLARS OF DOCUMENT PLANNING:

1. **Consistent Naming:** Every document follows the same naming convention
2. **Logical Structure:** Folders organized by transaction, then by document type
3. **Completeness Tracking:** Checklist of required documents for each transaction type

How AI Enhances Your Document System

- **Automatic categorization:** AI identifies document types and suggests filing locations

- **Content extraction:** Pull key information without opening each document

- **Missing document alerts:** Compare your files against required document checklists

- **Search and retrieval:** Find documents by content, not just filename

- **Version control:** Identify the most recent version of amended documents

Recommended Folder Structure

```
📁 2026 Transactions
  📁 [Address] - [Client Name]
    📁 01-Listing Documents
    📁 02-Purchase Agreement
    📁 03-Disclosures
    📁 04-Inspection
    📁 05-Appraisal
    📁 06-Title & Escrow
    📁 07-Lender Documents
    📁 08-Closing Documents
    📁 09-Correspondence
```

SYSTEM 4: DOCUMENT INTELLIGENCE PROMPTS

DOCUMENT NAMING CONVENTION GENERATOR:

```
Create a document naming convention for real estate transactions that
includes:
- Date format
- Document type identifier
- Property identifier
- Version tracking

Make it sortable, searchable, and consistent. Provide examples for:
- Purchase agreements and amendments
- Disclosure documents
- Inspection reports
- Lender documents
- Closing documents

Format: [Convention explanation] + [10 example filenames]
```

MISSING DOCUMENT CHECKER:

```
I'm reviewing documents for a [BUYER/SELLER] transaction. Here's what I
have:
[LIST YOUR DOCUMENTS]

Compare against a standard checklist for this transaction type and tell me:
1. What required documents am I missing?
2. What documents are nice-to-have but not essential?
3. Are there any documents that seem incomplete?
4. What should I request from the other party?
5. What deadlines apply to missing documents?

Transaction type: [PURCHASE/SALE/LEASE]
State: [STATE]
```

DOCUMENT SUMMARY GENERATOR:

```
Create a one-page summary of this transaction's key documents:
- Property address and parties
- Key terms from purchase agreement
- Important dates and deadlines
- Inspection findings summary
- Appraisal value
- Any amendments or special conditions
- Outstanding items needed

Use bullet points for quick scanning.

[PASTE KEY DOCUMENT EXCERPTS]
```

Document Planning System Notes

MY CURRENT DOCUMENT STORAGE LOCATION:

BIGGEST DOCUMENT ORGANIZATION PAIN POINTS:

NAMING CONVENTION I'LL ADOPT:

FOLDER STRUCTURE CHANGES I NEED TO MAKE:

DOCUMENT TYPES I LOSE TRACK OF MOST OFTEN:

YOUR 30-DAY IMPLEMENTATION PLAN

WEEK 1: FOUNDATION SETUP

- ☐ Choose your AI tool (ChatGPT, Claude, etc.)
- ☐ Save all prompts from this workbook
- ☐ Set up document folder structure
- ☐ Create naming convention guide
- ☐ Test contract review on one document

WEEK 2: CONTRACT & DEADLINE SYSTEMS

- ☐ Run AI review on active contract
- ☐ Extract all deadlines from current deals
- ☐ Set up calendar with all deadlines
- ☐ Configure reminder schedule
- ☐ Create deadline tracking spreadsheet

WEEK 3: COMMUNICATION SYSTEMS

- ☐ Generate email templates for all milestones
- ☐ Create text message sequence
- ☐ Send first AI-assisted update
- ☐ Set up template storage system
- ☐ Train on personalizing AI drafts

WEEK 4: FULL INTEGRATION

- ☐ Process one transaction using all systems
- ☐ Document time saved vs. old process
- ☐ Refine prompts based on experience
- ☐ Create personal quick-reference guide
- ☐ Identify next optimization opportunities

NEVER MISS A DATE CHECKLIST

For every new transaction, complete this checklist within 24 hours of contract acceptance:

- ☐ Extract all dates using AI prompt
- ☐ Add all deadlines to calendar with reminders
- ☐ Enter transaction in master tracking spreadsheet
- ☐ Identify dependencies between deadlines
- ☐ Flag highest-risk deadlines for extra attention
- ☐ Schedule first client update communication
- ☐ Create transaction folder with proper structure
- ☐ File initial documents with correct naming

YOUR PROFIT COMMITMENT CONTRACT

Based on today's workshop, I commit to the following implementation plan:

PRIMARY SYSTEM FOCUS

I will master _____ first because it will save me the
most time and protect my business most effectively.

TIME INVESTMENT

I will invest _____ hours this week setting up my systems.

SUCCESS METRICS

Time savings target: _____ hours per transaction

Deadline misses target: _____ (goal: ZERO)

Client communication improvement: _____

ACCOUNTABILITY

Accountability partner: _____

Weekly check-in: Every _____ at _____

30-day review date: _____

MY FIRST ACTION (WITHIN 24 HOURS)

_____

_____

_____   _____
Signature   Date

FINAL LEGAL REMINDER: The systems and prompts in this workbook are tools for efficiency and
awareness. They are NOT legal advice, and we are NOT attorneys. AI is your "second set of eyes" to
help you catch issues and work more efficiently—it does NOT replace the need for proper legal
counsel. Always consult with a licensed attorney for legal questions, contract disputes, or situations
with significant liability. By signing above, you acknowledge this disclaimer.

ROI Quick Calculator

Current hours per transaction on paperwork: _____

Hours after implementing these systems: _____

Hours saved per transaction: _____

Your hourly value: $_____

Value saved per transaction: $_____

YOUR TRANSACTION DOMINATION MANIFESTO

"While my competitors spend hours buried in paperwork, I review contracts in minutes.

While they miss deadlines and scramble to recover, my systems alert me days in advance.

While they struggle to keep clients informed, my communication runs on autopilot.

While they drown in document chaos, I find any file in seconds.

AI doesn't replace my expertise—it amplifies it. Every hour I save is an hour I invest in relationships, strategy, and growth.

This is my competitive advantage, and I will master it."

My Personal Success Statement

Write your own commitment to transaction automation mastery:

_____

_____

_____

To Your Transaction Domination,

EDMUND BOGEN & TEAM

Edmund's Mastermind & Group Coaching

"Because Drowning in Paperwork is NOT an Option!"