10 Things Real Estate Agents Should Stop Doing and Let AI Do



Agent AI Lab
with Jim Abner

A PRACTICAL GUIDE FOR YOUR NEXT WORKDAY

Pick one task. Try one prompt.

Ten copy-and-paste prompts for work you already do, from preparing a showing to tracking a transaction. Each one tells you what to hand off and what to check yourself.

START HERE

How much should you hand off?

You don’t need a connected system to start. Paste the information for one task and ask for a draft you can check.

01	Ask	“What should I check before this showing?”
02	Collaborate	“Here are my notes. Which two questions are still open?”
03	Delegate	“Use these records and boundaries to shortlist comps. Explain your exclusions.”
04	Automate	“Repeat that approved search on a schedule. Flag new matches for my review.”

EXAMPLE / PRICING

Give the assistant your judgment criteria.

“Find nearby sales” leaves out what you know about the neighborhood. Try: “Stay east of Olio Road. Exclude waterfront lots. Show me the sale you almost used but rejected, and why.”

That last sentence gives you a quick way to spot a weak comparison before it reaches a client.

Set the boundary before you paste. Use information you have permission to share. Remove personal details, access codes and account credentials. A chat can draft from what you provide; searching private files, sending messages or running on a schedule needs separate access and setup.

WORKFLOWS 01–02

Before the showing

Give buyers useful context without passing off an assumption as a fact.

01 | PASTE LISTING & NOTES

Build a showing brief

Your buyer is driving in for one house. Skip the three-tab scramble and arrive with the questions that matter.

> COPY THIS PROMPT
>
> Using only [listing sheet], [price history] and [buyer priorities], write a 60-second showing brief. Give me three features to see in person, two questions for the listing agent and anything that conflicts across the sources. Label each fact with its source and date. Do not infer why the seller is moving.

Your check: Check the price and status before you leave. A photo of a backyard is not proof of water access.

02 | PASTE COMP DATA

Build a shortlist of comparable sales

Give the assistant the boundaries you know a map search will miss. Ask for reasons, not just addresses.

> COPY THIS PROMPT
>
> Compare [subject] with [candidate sales]. Start in the subdivision. Stay east of Olio Road; exclude waterfront lots. Match style, above-grade area, basement and garage. Rank the three strongest closed sales, explain two exclusions, and flag anything you cannot verify. Keep active and pending listings separate. Do not invent concessions or adjustments.

Your check: Replace the example boundaries with yours. Verify sales and concessions in the MLS; you make the pricing call.

WORKFLOWS 03–04

After the conversation

Use the words clients actually use. Keep sending and publishing in your hands.

03 | PASTE ONE REAL QUESTION

Draft a week of social posts

Use a question a client actually asked as the starting point for a week of useful posts.

> COPY THIS PROMPT
>
> A buyer asked [anonymized question]. Using [my answer and verified facts], draft a short Facebook post, a 30-second video script and a three-slide carousel. Give each a different opening. Sound like a local agent talking to one person. Use no market statistics I did not supply.

Your check: Read each opening aloud. Cut the one that sounds like an ad. Review and schedule only what you would say yourself.

04 | PASTE ANONYMIZED NOTES

Write the second-showing follow-up

The useful part is remembering what mattered to these buyers, not sending a text five seconds sooner.

> COPY THIS PROMPT
>
> These are my notes from a second showing: [notes]. Draft a text under 60 words. Mention one detail the buyers liked and one question I promised to check. Ask one easy next-step question. Do not imply there are other offers or that I know what the seller will accept. Draft only; do not send.

Your check: Confirm the detail, recipient and contact preference. Add the turn of phrase that makes it sound like you.

WORKFLOWS 05–06

From notes to finished copy

Start with verified facts. Turn one set of inputs into several useful drafts.

05 | PASTE APPROVED FACTS

Turn one fact sheet into listing copy

Write from one checked source instead of describing the same kitchen from scratch three times.

COPY THIS PROMPT

> Using only [seller-approved feature sheet] and [verified listing facts], draft a listing description under [character limit], a flyer headline and three talking points for an open house. Describe the home, not who should live there. List any missing detail separately; do not fill it in.

Your check: Check every claim against the source. “Roof replaced in 2023” and “new roof” are not the same statement.

06 | PASTE YOUR OWN NOTES

Turn a conversation into action items

After a consult, separate decisions from ideas before a casual suggestion becomes a promise.

COPY THIS PROMPT

> Here are my anonymized meeting notes: [notes]. Make three sections: decisions made, open questions and next actions. For each action, name the owner and due date only when the notes say so; otherwise write “unassigned” or “not set.” Draft a five-line recap for my review. Do not send or add anything to a calendar.

Your check: Check names, dates and promises. Use your own notes or a transcript you have permission to use.

WORKFLOWS 07–08

Inside the transaction

Find the evidence first. Change files and calendars only after you check it.

07 | PASTE A FILE LIST OR USE READ-ONLY ACCESS

Find the right transaction document

Start with filenames. The assistant does not need an entire transaction folder to propose where to look.

> COPY THIS PROMPT
>
> Using [filenames and folder paths] plus [example filing structure], identify likely matches for [document I need]. Show each exact path, explain the match and flag versions that could be drafts. Put uncertain matches in a review list. Do not rename, move or delete anything.

Your check: Open the candidate and verify address, date and signatures. A filename ending in FINAL is not proof of execution.

08 | PASTE APPROVED CONTRACT EXCERPTS

Build a transaction milestone checklist

Turn relevant excerpts into a review checklist before anything lands on a calendar.

> COPY THIS PROMPT
>
> From [authorized, redacted excerpts and amendments], extract each milestone, exact clause wording, triggering event and time unit. List missing dates, conflicts and unclear terms. Do not treat the signing date as the trigger unless the text says so. Do not calculate unresolved deadlines or create reminders.

Your check: Check the signed agreement and amendments yourself. Only enter reminders after you verify dates, counting rules and ownership.

WORKFLOWS 09–10

When the technology slows you down

Ask for one safe test or one teachable step, not a dozen guesses.

09 | PASTE A REDACTED ERROR

Troubleshoot one software problem

Give the assistant the symptom and a safe test instead of asking it to guess what setting is broken.

COPY THIS PROMPT

I expected [result] in [tool and version]. Instead I saw [redacted error]. I already tried [steps]. Give me the least disruptive test first, what I should see and what either result means. Ask for one missing detail if needed. Do not suggest deleting data, exposing credentials or changing live settings as a first step.

Your check: Use a sample record. If a fix requires a live change, check current vendor instructions and your rollback plan first.

10 | START WITH A PRACTICE RECORD

Learn one workflow, not a whole platform

A useful lesson ends with something you can do, not a tour of twenty menus.

COPY THIS PROMPT

Coach me through [one specific task] using [tool] and a fictional practice record. First ask what I already know. Give me one step at a time and wait for my result. If my screen differs, ask what I see instead of guessing. Finish by having me repeat the task and write a five-step checklist.

Your check: Run the checklist on a second practice record without help. Keep the steps that work and correct the ones that do not.

PUT IT TO WORK

Your first delegation

Pick one recurring task. Try it once with AI. Use this page to decide whether the result was worth repeating.

Which task will I try, and when will I use the result?

What inputs can I safely share?

What does a useful first draft look like?

What must I verify before anyone relies on it?

Usual hands-on minutes	AI setup + review minutes	Net hands-on minutes saved

Subtract setup, checking and corrections from the time you usually spend. A negative result is useful, too: it tells you the workflow needs work.

AGENT AI LAB OFFICE HOURS

Bring the task that didn't quite work.

Bring your prompt, a sample with private details removed, and the part you had to fix. That's a good starting point for the next hands-on session.

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