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# AI ASSESSMENT REPORT

MELISSA AVARA REALTY GROUP

# 1. Executive Summary

<p>AI Readiness</p> <p><b>Medium-High</b></p> <p>Strong service model; tools need connection</p>	<p>Main Opportunity</p> <p><b>Lead + Marketing</b></p> <p>Follow-up safety net and content engine</p>	<p>First 60 Days</p> <p><b>4-8 hrs/wk</b></p> <p>Estimated time reclaimed after adoption</p>	<p>Human Role</p> <p><b>Required</b></p> <p>Review, trust, compliance, relationships</p>
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Melissa Avara Realty Group is a relationship-driven real estate business serving residential and commercial clients across the DFW market. The business has a strong client-service identity: white-glove guidance, local market knowledge, proactive communication, and education through each step of buying, selling, commercial, land, and investment transactions. Public website messaging reinforces this positioning through buyer and seller resources, neighborhood guides, home valuation capture, testimonials, newsletter capture, and direct contact forms.

The audit shows a clear opportunity for AI to reduce the operational load around lead generation, follow-up, marketing, meeting notes, and repetitive communication. Melissa already uses ChatGPT and Claude, which lowers adoption friction. The biggest issue is not lack of tools; it is that the current tools mostly operate separately, and many business processes still live in memory rather than in repeatable workflows.

## Expected Outcomes

- Fewer missed leads or delayed replies across website forms, email, social DMs, and scheduling links.
- A repeatable weekly marketing engine that creates useful, brand-consistent content without requiring Melissa to start from a blank page.
- Cleaner call notes, CRM notes, action items, and client recap emails after consultations and meetings.
- A more consistent buyer, seller, and referral follow-up experience without sacrificing Melissa's personal touch.
- Better visibility into what is working: leads captured, response time, follow-up completion, content cadence, and appointments booked.

# 1. Executive Summary

## Value At A Glance

Value Area	AI Support	Business Impact
Lead follow-up safety net	AI classifies inbound leads, drafts the first response, and creates a follow-up task.	Lower risk of emails, DMs, texts, or website leads falling through the cracks.
Marketing content engine	AI turns topic ideas, local expertise, and market observations into posts, newsletters, reels, and story prompts.	Consistent marketing with less blank-page time and less mental load.
Meeting recap assistant	AI summarizes consults and extracts client goals, open questions, and next steps.	More complete CRM notes and faster follow-up after buyer/seller conversations.
Scheduling automation	Calendly-style links route prospects to the right call type and collect intake questions first.	Less back-and-forth and better preparation before calls.
Referral nurture	AI segments contacts and drafts warm, non-pushy check-ins.	More consistent referral touches without sounding automated.

### Recommended Strategy

Start with a small, connected stack: one primary AI writing workspace, Fathom for meeting summaries, Calendly for intake scheduling, Canva/Metricool for content production, and either Zapier or Make for simple lead-routing automations. Add Manychat once social DM/comment workflows are ready. Keep Referral Maker as the initial source of truth unless integration limitations become a major blocker.

## 2. Current State Overview

This section summarizes the current operational landscape based on Melissa's audit questionnaire, public business information, and tool research.

### 2.1 Operational Landscape Snapshot

Area	Current State
Business model	Solo real estate broker and realtor with service-based revenue. Core services include buying and selling real estate, plus support for residential, commercial, land, and investor needs.
Years in operation	10 years. This suggests an established relationship base and strong referral potential.
Operating roles	Melissa personally handles sales and lead generation, client communication, service delivery, marketing, admin and scheduling, billing/invoicing oversight, and customer support.
Support team	Occasional contractors/freelancers and a transaction coordinator who supports paperwork, MLS listing entry, and transaction communications.
Time load	40-60 hours per week. Client work is 25-50% of time; admin, sales/marketing, and communication each consume meaningful time.
Client acquisition	Primarily referral-based. This is a strength, but it requires consistent database nurturing and fast lead response.
First contact process	Initial call, paperwork, listing appointments or buyer home search setup, and collection of real estate goals. The process is somewhat consistent but not fully systematized.
Current tools	Referral Maker CRM, Jointly, MLS, ChatGPT, Claude, social media, and QuickBooks. The tools mostly operate separately.
Process maturity	Many workflows are still done from memory. This creates risk as lead volume, client volume, or social engagement grows.
Most time-consuming areas	Lead generation, client follow-ups, and marketing. Melissa identified marketing as both complex and not naturally enjoyable, even though it is essential.
Primary risk	No major breakdown yet, but Melissa wants to prevent emails, DMs, messages, and new leads from falling through the cracks as the business grows.

## 2. Current State Overview

### 2.2 Operational Readiness Snapshot

Readiness Area	Score	Why It Matters
Client experience	Strong	Melissa's public brand and questionnaire both point to strong communication, education, local expertise, and client care.
AI adoption	Moderate	ChatGPT and Claude are already in use, but prompt structure and repeatable use cases need to be formalized.
Tool integration	Low-Medium	Tools mostly operate separately; simple automation can create immediate value.
Data/process documentation	Low-Medium	Key processes are memory-based, which limits delegation and automation.
Automation opportunity	High	The highest-value areas are repetitive, text-heavy, and workflow-driven: lead intake, follow-up, marketing, notes, and reminders.

#### Current-State Diagnosis

Melissa does not need an AI overhaul. She needs a practical operating layer that connects intake, scheduling, CRM tasks, content drafting, and human review. The right system should make the business feel calmer, not more complicated.

# 3. AI Opportunity

The best AI opportunities are the workflows where Melissa repeats the same mental work, writes similar messages, captures similar details, or needs reminders to prevent client and lead communication from slipping. The use cases below are prioritized by business impact, ease of implementation, and alignment with a solo real estate practice.

Priority / Use Case	Goal + What AI Does	Automation Flow	Human Review Point
<b>1   Lead Capture + Follow-Up Safety Net</b> <u>Impact:</u> High <u>Ease:</u> Medium-High	<u>Goal:</u> prevent website, email, social, and scheduling leads from falling through the cracks. <u>AI role:</u> classify lead type, urgency, source, missing details, and next action; draft a first response and CRM note.	Website form, home valuation, email, DM, newsletter, or Calendly -> automation captures lead -> AI labels and drafts response -> CRM task/reminder created -> Melissa reviews and sends	Melissa reviews the first response and anything involving price, property details, financing, legal terms, fair housing, or neighborhood claims.
<b>2   Weekly Marketing Content Engine</b> <u>Impact:</u> High <u>Ease:</u> High	<u>Goal:</u> create consistent, helpful marketing without weekly blank-page work. <u>AI role:</u> turn local expertise, FAQs, market observations, and topic ideas into posts, reels, emails, and newsletter drafts.	Topic bank -> AI drafts content set -> Canva designs -> Metricool schedules -> Melissa approves -> content publishes	Melissa verifies market data, property facts, tone, TREC advertising requirements, and fair-housing-safe wording before publishing.
<b>3   Meeting + Call Recap Assistant</b> <u>Impact:</u> High <u>Ease:</u> High	<u>Goal:</u> capture client goals, preferences, questions, action items, and next steps after consults. <u>AI role:</u> summarize calls, extract tasks, draft follow-up email, and prepare CRM notes.	Call or meeting -> Fathom summary -> AI action list -> CRM note/task -> follow-up email draft -> Melissa sends	Melissa verifies the summary, deadlines, preferences, and any advice before sending or filing.
<b>4   Buyer/Seller Onboarding + Next-Step Checklist</b> <u>Impact:</u> High <u>Ease:</u> High	<u>Goal:</u> make every new buyer or seller feel guided from the first formal conversation. <u>AI role:</u> turn intake answers into a customized welcome email, checklist, prep list, and internal next steps.	Calendly intake or first call notes -> AI creates checklist + welcome draft -> CRM stage/task created -> Melissa reviews -> client receives a clear path	Melissa reviews all dates, MLS/transaction requirements, property-specific details, and advice before sending.
<b>5   Referral + Past Client Nurture</b> <u>Impact:</u> High <u>Ease:</u> High	<u>Goal:</u> create consistent, warm referral touches without sounding automated. <u>AI role:</u> segment contacts and draft personalized check-ins, home tips, referral partner notes, and value-first reminders.	Referral Maker list or segment -> AI drafts message options -> Melissa personalizes one detail -> send via email/text/card -> CRM touch logged	Melissa approves every relationship message, especially high-value past clients and referral partners.

## 4. Tool Selection Criteria

Tool recommendations were selected using five criteria: business fit, stability, ease of use for a solo entrepreneur, integration potential, and market signal. FutureTools upvotes were checked where available; these are useful popularity signals but not the sole deciding factor. Pricing and feature notes should be verified at signup because SaaS pricing changes frequently.

Selection Criterion	How It Was Applied
Client trust first	No tool should send sensitive or compliance-sensitive messages without Melissa's approval.
Use the current stack where possible	Referral Maker, Jointly, MLS, ChatGPT, Claude, social media, and QuickBooks are already part of the business environment.
Avoid tool sprawl	Start with 2-3 paid upgrades before adding more automation. Every tool should have a clear owner, workflow, and success metric.
Prefer stable, widely used tools	Recommended tools have strong market adoption, official pricing/support, and practical integrations.
Prioritize low-friction setup	A solo entrepreneur needs tools that work without requiring a full-time operations person.

# 4. Tool Selection Criteria

## 4.1 Recommended Tool Stack

Tool / Category / Cost	Problem It Solves	Why Selected Over Alternatives	Suggested Melissa Use Case
<p><b>ChatGPT Plus or Claude Pro</b>  <u>Category:</u> Primary AI workspace  <u>Difficulty:</u> Low  <u>Estimated cost:</u> \$20/user/mo, verify at signup</p>	<p>Solves daily drafting, prompt reuse, lead-response drafts, content batching, onboarding checklists, referral messages, SOPs, and light analysis.</p>	<p>Selected because Melissa already uses ChatGPT and Claude, which lowers training friction. ChatGPT showed the strongest FutureTools signal in the prior research, while Claude remains strong for long-form writing. To avoid overwhelm, choose one primary workspace first rather than paying for both indefinitely.</p>	<p>Create one "Melissa Realty AI" workspace with brand voice, human-review rules, and saved prompts for the five workflows.</p>
<p><b>Fathom</b>  <u>Category:</u> AI meeting assistant  <u>Difficulty:</u> Low  <u>Estimated cost:</u> Free; Premium about \$20/mo</p>	<p>Solves lost meeting notes, incomplete action items, and slow follow-up after buyer/seller consults or referral partner calls.</p>	<p>Selected over Fireflies as the first meeting tool because the prior research showed a stronger FutureTools signal and Fathom has a practical free tier for unlimited recordings/transcriptions.</p>	<p>Use on approved calls to summarize client goals, extract tasks, draft recap emails, and copy structured notes into Referral Maker.</p>
<p><b>Calendly</b>  <u>Category:</u> Scheduling + intake automation  <u>Difficulty:</u> Low  <u>Estimated cost:</u> Free; Standard about \$10/seat/mo billed yearly</p>	<p>Solves back-and-forth scheduling, missing intake details, and inconsistent pre-call preparation.</p>	<p>Selected because it is stable, widely used, simple for clients, and supports intake questions, reminders, website embeds, and integrations..</p>	<p>Create links for buyer consults, seller consults, valuation review calls, listing prep, referral partner calls, and showing debriefs.</p>
<p><b>Zapier or Make</b>  <u>Category:</u> Light automation hub  <u>Difficulty:</u> Medium; low for one-source pilot  <u>Estimated cost:</u> free starter options; paid plans vary</p>	<p>Solves the problem of tools working separately by moving lead data, tasks, notes, and alerts between intake sources and Melissa's follow-up system.</p>	<p>Selected because one simple automation can protect leads without replacing the CRM. Use Zapier for easiest setup or Make for more visual, cost-efficient workflows. Use one, not both.</p>	<p>Build one pilot only: new lead -&gt; AI classify -&gt; lead log/CRM task -&gt; alert Melissa -&gt; draft response for review.</p>
<p><b>Canva Pro + Metricool Starter</b>  <u>Category:</u> Content design + scheduling  <u>Difficulty:</u> Low-Medium  <u>Estimated cost:</u> Canva Pro around \$15/mo; Metricool free/Starter from about \$20/mo</p>	<p>Solves slow social design, inconsistent posting, and limited visibility into content performance.</p>	<p>Selected because Canva is easy and template-rich, while Metricool adds scheduling and analytics. This pairing keeps marketing practical for a solo realtor without a heavy marketing platform.</p>	<p>Create branded templates, weekly content batches, post schedules, and a simple monthly performance review.</p>
<p><b>Referral Maker CRM</b>  <u>Category:</u> Existing CRM/source of truth  <u>Difficulty:</u> Low  <u>Estimated cost:</u> \$49/mo according to Buffini</p>	<p>Solves contact management, relationship tracking, daily action planning, and referral follow-up.</p>	<p>Selected to keep initially rather than replacing immediately. The fastest path is to clean up tags, stages, and follow-up tasks before considering a CRM migration.</p>	<p>Use as the source of truth for contacts, lead source, buyer/seller/commercial/land/referral tags, urgency, follow-up status, and post-close nurture.</p>

## 4. Tool Selection Criteria

### 4.2 Suggested Starter Stack

#### First 30 Days

Keep the stack intentionally small. Recommended starting tools: one primary AI workspace (ChatGPT or Claude), Fathom for meeting notes, Calendly for intake scheduling, Referral Maker for contact/follow-up tracking, Canva for reusable templates, and either Zapier or Make for one lead-routing pilot. Add Metricool when the weekly content rhythm is ready. Hold Manychat, full chatbot workflows, transaction-update automation, and CRM replacement until the first five workflows are stable.

### 4.2 Tools Not Recommended as First Moves

Not First	Why
Full CRM replacement	Too disruptive before the top five workflows are documented. First, optimize Referral Maker and identify true integration gaps.
Manychat or advanced social DM automation	Valuable later, but easier after Melissa has lead magnets, keywords, and lead handoff rules defined.
AI-only website chatbot	Higher risk of poor answers and client frustration unless tightly scoped. Start with AI-drafted responses and human review.
Expensive real-estate lead-gen suites	The current bottleneck is follow-up and marketing systemization, not buying more cold leads.
Fully automated outbound texting/emailing	Riskier for consent, compliance, and brand trust. Start with AI drafts and human approval.
Transaction updates and listing/tour prep automation	Helpful, but not as easy or urgent as the top five. Revisit after the first 60-90 days.

# 5. Risks, Constraints, & Dependencies

AI can help Melissa move faster, but real estate is trust-heavy, regulated, and personal. These controls should be treated as operating rules, not optional preferences.

## 5.1 Risk Register

Risk / Constraint	Why It Matters	Control
TREC advertising and social media risk	Texas license holders must avoid creating a misleading impression in advertising and social media. AI-generated posts can accidentally overstate claims or omit required context.	Use an approval checklist before publishing. Verify broker/license/disclosure requirements. Do not publish AI-generated property claims without review.
Fair housing and steering risk	Real estate advertising and advice must avoid discriminatory language or steering based on protected classes. AI may reproduce biased or risky phrasing.	Use the Compliance Review Prompt. Avoid protected-class references, neighborhood characterizations tied to people, or audience exclusions. Keep advice factual and client-specific.
Client privacy and data handling	Real estate work may involve financial, personal, contract, or transaction data. Public or consumer AI tools should not receive sensitive client documents by default.	Use placeholders. Do not paste SSNs, IDs, financial statements, full contracts, or confidential negotiations. Prefer business-grade AI settings when handling client context.
MLS, Jointly, and vendor terms	MLS and transaction platforms may restrict copying or reusing data in third-party AI tools.	Confirm vendor terms before sending MLS, CMA, transaction, or confidential listing information into AI. Keep comps and pricing work human-verified.
Email/text consent and opt-out	Commercial email and automated texting are subject to rules around accuracy, opt-out, and consent.	Collect consent where appropriate, include opt-out language in automated campaigns, and keep human oversight on one-to-one relationship messages.
AI hallucination	AI can invent market facts, property facts, neighborhood claims, or legal/financing details.	Use [VERIFY] rules in prompts. Melissa verifies all facts, comps, rates, deadlines, prices, forms, and legal/financial statements before use.
Brand dilution	Melissa's differentiator is personal, high-touch communication. Over-automation can make messages feel generic.	Use AI to draft, not replace relationship judgment. Personalize before sending. Maintain the warm, helpful, not pushy voice.
Tool sprawl and cost creep	Too many subscriptions can create more work instead of less work.	Buy tools in phases. Cancel unused tools after 60 days. Each tool must tie to one workflow and one metric.
Integration limitations	Referral Maker may not connect directly to every automation path.	Pilot with a lead log, Gmail task, or manual CRM entry if direct integration is unavailable. Decide later whether CRM migration is justified.

## 6. Recommended Roadmap

The roadmap is intentionally practical. It focuses on one operating improvement at a time so Melissa can feel the benefits quickly without creating a complicated technology project.

Phase	Focus	Actions	Deliverable / Metric
<b>Phase 0</b> Days 1-3	Foundation and rules	Select one primary AI workspace; create Melissa brand voice prompt; define no-go data; document lead sources; confirm the top five workflows only.	AI workspace created; lead-source list complete; review rules approved.
<b>Phase 1</b> Week 1-2	Quick wins	Set up Calendly event types and intake questions; activate Fathom for approved calls; create core prompts for the five workflows; draft lead reply templates.	Calls are easier to book; meeting notes and recap drafts are produced consistently.
<b>Phase 2</b> Week 3-4	Lead safety net	Build one lead-routing pilot using Zapier or Make. Start with website form, home valuation inquiry, Calendly booking, email inquiry, or one social source.	Every pilot lead creates a log, task, alert, and draft response.
<b>Phase 3</b> Week 5-6	Marketing engine	Create Canva brand templates; build monthly topic bank; use AI to batch weekly content; schedule in Metricool if needed.	3-5 posts per week scheduled; content planning takes less time.
<b>Phase 4</b> Week 7-8	Onboarding + referral nurture	Create buyer/seller onboarding checklists, welcome email drafts, referral/past-client nurture prompts, CRM tags, and follow-up tasks.	New clients receive clear next steps; referral touches are scheduled and personalized.
<b>Phase 5</b> Month 3	Optimize	Review metrics, prune unused tools, improve prompts, and decide whether direct Referral Maker integration or additional automation is worth exploring.	Stack is lean, measured, and repeatable.

# 6. Recommended Roadmap

## 6.1 ROI Measurement Plan

Metric	How to Measure	Target / Interpretation
Hours spent on marketing	Track total time to plan, draft, design, schedule, and publish each week.	Target 30-50% reduction after content templates and scheduling are in place.
Lead response time	Measure time from inbound lead to first meaningful response or scheduled call.	Target draft response within 15 minutes during business hours for digital leads; human send/approval remains required.
Leads captured	Count website, valuation, newsletter, email, DM, social, referral, and Calendly leads logged each week.	Target zero unassigned or uncategorized pilot leads.
Follow-up completion rate	Completed follow-up tasks divided by follow-up tasks due.	Target 80%+ completion within 60 days.
Content cadence	Number of planned posts/newsletters created and scheduled weekly.	Target 3-5 quality posts/week and one monthly newsletter draft.
Client recap consistency	Number of buyer/seller consults with summary and next-step email within 24 hours.	Target every formal consult receives a recap.
Referral touches	Number of warm check-ins sent to past clients and referral partners per month.	Target consistent monthly touch plan, personalized before sending.
Pipeline indicator	Consultations booked, leads converted to appointments, referrals received.	Track monthly trend. Do not expect immediate attribution; look for improved consistency.

# 7. AI Prompts and Setup

This section gives Melissa a practical setup kit: simple workflow diagrams, easy flow charts, ready-to-use prompts, and plain-language implementation guides. The diagrams are intentionally simple and vertical so they can be explained quickly and implemented one step at a time.

## 7.1 Simple Workflow Diagrams

### Lead Capture Safety Net

New lead appears: website form, home valuation, email, DM, newsletter, or Calendly

v

**Automation copies lead into a lead log, CRM task, or Melissa alert**

v

AI labels: buyer, seller, commercial, land, referral, urgency, source, missing details

v

AI drafts reply and next-step task

v

**Human Review: Melissa approves, edits, or personalizes**

v

**Melissa sends reply and logs outcome**

v

CRM reminder confirms next follow-up

Easy explanation: every new lead gets caught, labeled, and prepared. Melissa still decides what to send.

# 7. AI Prompts and Setup

## Marketing Content Engine

**Melissa adds topic idea: market tip, buyer question, seller prep, local spotlight**

v

AI creates captions, newsletter text, reel script, and carousel outline

v

Canva turns approved text into branded designs

v

Metricool schedules posts and tracks performance

v

**Human Review: Melissa checks facts, tone, compliance, and usefulness**

v

Content publishes and results are reviewed monthly

Easy explanation: Melissa supplies the wisdom; AI helps turn it into content; Melissa checks it before it goes live.

# 7. AI Prompts and Setup

## Meeting Recap Assistant

Buyer, seller, or referral call happens

v

Fathom records and summarizes with consent where required

v

AI extracts goals, timeline, concerns, action items, and open questions

v

AI drafts a follow-up email and CRM note

v

**Human Review: Melissa verifies details and sends recap**

v

**CRM task reminds Melissa of the next action**

Easy explanation: the call does not disappear after it ends. The next steps become visible.

# 7. AI Prompts and Setup

## Buyer/Seller Onboarding Checklist

Calendly intake or first client conversation captures goals and timeline

v

AI turns intake answers into a buyer or seller next-step checklist

v

AI drafts welcome email, prep list, and internal task list

v

Human Review: Melissa confirms details and adds personal guidance

v

Client receives clear next steps

v

Referral Maker task reminds Melissa of the next action

Easy explanation: the client answers a few questions, AI turns that into a clear checklist, and Melissa approves the plan before the client receives it.

# 7. AI Prompts and Setup

## Referral Nurture Flow

Referral Maker contact list or selected past-client group

v

AI suggests warm check-in message based on relationship context

v

**Melissa personalizes one sentence**

v

Message is sent by email, text, or handwritten note

v

CRM records touch and creates next reminder

Easy explanation: AI helps Melissa remember who to care for and what to say, but the message still feels like Melissa.

# 7. AI Prompts and Setup

## 6.2 Clear Implementation Guides

Tool	Plain-Language Setup Steps	Must-Have Settings / Rules	Done Means
ChatGPT or Claude	<ol style="list-style-type: none"> <li>1. Choose one as the main AI workspace.</li> <li>2. Create a project/workspace called Melissa Realty AI.</li> <li>3. Paste the Brand Voice Setup Prompt.</li> <li>4. Save prompts for leads, marketing, recaps, onboarding, referral nurture, and compliance review.</li> <li>5. Use [VERIFY] for facts, dates, prices, and claims.</li> </ol>	Do not paste private client documents or confidential data unless using approved business settings. Keep approved disclaimers and tone examples in the workspace.	Melissa can generate a safe first draft in under 3 minutes and knows what must be checked.
Calendly	<ol style="list-style-type: none"> <li>1. Create event types: Buyer Consult, Seller Consult, Valuation Review, Listing Prep, Referral Partner Call, Showing Debrief.</li> <li>2. Add intake questions.</li> <li>3. Add reminders.</li> <li>4. Put links in email signature, website, and social bio.</li> </ol>	Collect name, email, phone, buyer/seller need, timeline, property/location interest, referral source, preferred contact method, and one biggest question.	Every booked call includes enough information for Melissa to prepare without extra back-and-forth.
Fathom	<ol style="list-style-type: none"> <li>1. Connect Zoom/Google Meet.</li> <li>2. Decide recording consent language.</li> <li>3. Use it on approved consults.</li> <li>4. Copy action items into CRM or lead log.</li> <li>5. Use the Meeting Recap Prompt after important calls.</li> </ol>	Only record with proper notice/consent. Verify transcripts before sending any recap.	A consult produces a summary, action list, CRM note, and follow-up email draft.
Zapier or Make	<ol style="list-style-type: none"> <li>1. Choose one automation hub.</li> <li>2. Pick one pilot source first.</li> <li>3. Create trigger: new form/booking/DM/email.</li> <li>4. Add AI classification step.</li> <li>5. Create task/log/alert.</li> <li>6. Test with 5 fake leads.</li> </ol>	If Referral Maker does not connect directly, use Gmail, Google Sheet, or task alert as the first bridge.	No pilot lead disappears. Every pilot lead creates a visible next action.
Canva + Metricool	<ol style="list-style-type: none"> <li>1. Build brand kit.</li> <li>2. Create 8-12 reusable Canva templates.</li> <li>3. Use AI to create weekly content batches.</li> <li>4. Schedule in Metricool when ready.</li> <li>5. Review analytics monthly.</li> </ol>	Use consistent branding. Verify facts and avoid fair-housing-sensitive language before scheduling.	Melissa has a weekly content rhythm without designing every post from scratch.
Referral Maker	<ol style="list-style-type: none"> <li>1. Keep as source of truth.</li> <li>2. Add tags for source, lead type, urgency, and stage.</li> <li>3. Add follow-up tasks after every meaningful contact.</li> <li>4. Review top contacts weekly.</li> <li>5. Use it for onboarding and referral-nurture reminders.</li> </ol>	Do not switch CRMs until workflows are clear and integration gaps are proven painful.	Melissa knows who needs follow-up and can measure lead, onboarding, and referral touch consistency.

# 7. AI Prompts and Setup

## 6.3 Starter Prompt Library

### 1-Brand Voice Setup Prompt

You are my AI assistant for Melissa Avara Realty Group, a DFW real estate broker focused on white-glove service, clarity, education, and proactive communication. Write in a warm, confident, professional, practical tone. Never sound pushy. Avoid guarantees. Avoid legal, tax, lending, appraisal, or fair-housing-sensitive claims. When a claim needs verification, mark it [VERIFY]. Ask clarifying questions when client needs are unclear. Keep messages concise enough to send by text or email unless I request long-form.

Context:

- Services: residential buying/selling plus commercial, land, and investor clients.
- Differentiators: local knowledge, detail-oriented process, proactive guidance, client education, and value long after closing.
- Primary audience: referrals, past clients, buyers, sellers, relocating clients, local DFW homeowners, and referral partners.

### 2-Lead Triage + First Reply Prompt

Review this inbound real estate lead. Classify lead type (Buyer/Seller/Both/Commercial/Land/Investor/Renter/Referral/Unknown), urgency (Hot/Warm/Nurture/Needs info), source, top need, missing details, and next best action. Then draft a first response in Melissa's warm professional voice. Do not make pricing, neighborhood, lending, or legal claims. Include a Calendly link placeholder only when a consultation is appropriate.

Lead message: [PASTE]

Known contact details: [NAME / EMAIL / PHONE / SOURCE]

Output:

1. Lead summary
2. Required CRM tags
3. Follow-up task
4. Draft email under 160 words
5. Draft text under 320 characters
6. Questions Melissa should ask

### 3-Weekly Content Package Prompt

Act as my real estate marketing assistant. Create a weekly content package for Melissa Avara Realty Group focused on [TOPIC]. Audience: DFW buyers, sellers, past clients, and referral partners. Output: 1 short newsletter intro, 3 social captions, 1 reel script, 1 carousel outline, 1 email subject line, and 3 story prompts. Tone: helpful, local, practical, not hype. Avoid steering or protected-class references. Mark market data as [VERIFY]. End with a soft CTA to schedule a consultation or ask a question.

# 7. AI Prompts and Setup

## 4-Meeting Recap Prompt

Summarize this consult transcript or notes into a client-ready recap. Include client goals, timeline, must-haves, concerns, decisions made, next steps for Melissa, next steps for the client, open questions, and CRM notes. Draft a follow-up email that sounds like Melissa. Do not include confidential details not necessary for the email. Flag anything that needs verification.

Transcript/notes: [PASTE]

## 5-Buyer/Seller Onboarding Checklist Prompt

Create a clear onboarding checklist and consultation prep plan for a [BUYER / SELLER / VALUATION / REFERRAL] client. Client profile: [PASTE INTAKE ANSWERS]. Include what Melissa should prepare, what the client should prepare, missing information to collect, a simple appointment agenda, and a friendly welcome email. Avoid legal, tax, lending, appraisal, or pricing advice. Mark property facts, MLS/CMA data, dates, and market claims as [VERIFY].

## 6-Referral / Past Client Check-In Prompt

Create a personalized check-in for a past client or referral partner. Relationship context: [CONTEXT]. Goal: sincere value, not aggressive selling. Include one helpful home or market tip, a warm personal note, and a simple referral-friendly closing. Provide email, text, and handwritten note versions. Avoid sounding automated.

## 7-Compliance and Brand Review Prompt

Review this draft for fair housing risk, steering risk, misleading claims, unsupported market/property claims, TREC/social media disclosure concerns, privacy issues, pushy tone, and brand mismatch. Return a Red/Yellow/Green rating, key risks, exact edits, and a safer final version.

Draft: [PASTE]

# Disclaimer

## **A quick note on the nature of AI...**

The tools, platforms, and capabilities available today may look very different six months from now. That is the nature of one of the fastest-moving industries in history. Every report is built around the best available information at the time of delivery, and all tool recommendations, pricing references, and platform capabilities are based on available data as of your report date.

GAW Solutions is not responsible for changes that occur after delivery, including shifts in tool pricing, availability, or functionality. We recommend revisiting your audit periodically and encourage you to reach out if you have questions about how the evolving AI landscape may impact your recommendations.