

PARTNERING FOR SUCCESS

# AI for Realtors: Don't Get Left Behind

Unlocking the Power of AI Prompts to Grow Your Real Estate Business

May 29, 2025





## Shawn Brown

Founder/CEO

✉ [shawn@clendinggroup.com](mailto:shawn@clendinggroup.com)

☎ (949) 500-1289

# INTRO – About California Lending Group

---

## Being local matters!

We are a local lender with deep roots in Orange County and San Diego, offering tailored lending solutions and an unparalleled borrower experience.



“ *Our mission is to serve our customers with honesty, integrity, and competence.* ”

-Shawn Brown, California Lending Group CEO

# AGENDA

- ✓ Introduction to California Lending Group
- ✓ Why AI Matters for Real Estate Agents
- ✓ What AI Can (and Can't) Do
- ✓ AI Prompting 101
- ✓ Real Estate-Specific AI Prompt Examples
- ✓ Why Work With California Lending Group?
- ✓ Q & A







# Why AI Matters for Real Estate Agents

# The Problems Today's Realtors Face

- High client expectations
- Time-consuming marketing and follow-up
- Competition with DIY platforms like Zillow
- Needing to stand out and stay relevant in a changing tech landscape

# The Realtor's Daily Struggle

## The Problem:

- Low inventory, high expectations
- Endless follow-ups and admin
- Standing out is harder than ever



# Why AI? Why Now?

- Real estate is changing fast
- AI provides an edge in speed, content, and communications
- Most agents aren't using it yet





# What AI Can Do For You

## What AI Can Actually Do For Realtors:

- Fast content creation (listing descriptions, emails, blog posts, social media captions)
- Real-time responses and better communication
- Deal scenario simulations for clients
- More follow-ups and touchpoints, without more hours

# Can AI Help You Win More Referrals?

## How AI Helps You Win Referrals:

- Personalized post-close follow-up messages
- Generating ideas for value-added client check-ins
- Staying top-of-mind without manual work

A photograph of three people (two women and one man) standing together and looking at a tablet held by one of the women. They are all smiling. The image is overlaid with a solid blue color. A thin white vertical line is positioned to the left of the text.

# What AI Can (and Can't) Do

# How AI Helps Realtors Win More Business

## What AI Can Do:

- Draft high-quality listing descriptions in seconds
- Write compelling emails for buyers and sellers
- Automate follow-ups and social content
- Translate market insights into easy-to-share posts
- Save hours each week on admin and marketing

# What AI Can't Do

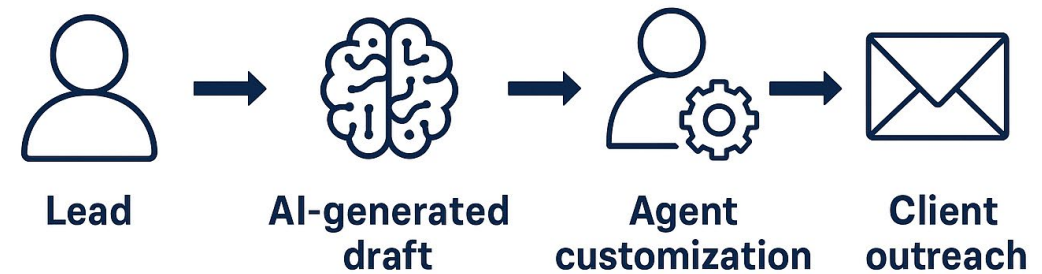
## What AI Can't Replace:

- Building human trust and emotional connections
- Navigating complex deal dynamics
- Replacing your voice or instincts
- Giving local market nuance like a true expert
- Substituting for compliance and legal advice

# USE AI WISELY

- Use it to draft, then personalize
- Rely on it for speed and strategy
- Let it help with outreach, not relationships
- Train it to reflect your tone and brand

## WHERE AI FITS IN YOUR WORKFLOW



**A streamlined communication workflow for real estate agents:** from lead generation to AI-assisted content creation, personalized agent input, and client outreach, AI saves time and boosts engagement.



# AI Prompting 101: UNLOCKING GENERATIVE AI FOR REAL ESTATE SUCCESS





Poll Question: Which of the following generative  
AI tools have you used?

# UNLOCKING GENERATIVE AI

## AI Basics: Prompting 101

- ◆ General Best Practices
  - What is prompting?
  - How AI thinks (tokens, temperature, context)
  - Simple prompt structure: Role + Task + Output Format + Tone

Generate 5 short, engaging Instagram captions to showcase a new listing:

- Style: Playful and informative
- Emphasis: Home features, local community perks, open-house announcement
- Hashtags: relevant, local hashtags

Include emojis for higher engagement.

Property address: 849 Plaza Cuernavaca Way, San Diego, CA 92114


Here are 5 short, engaging Instagram captions for the new listing at **849 Plaza Cuernavaca Way, San Diego, CA 92114**, with a playful yet informative tone and hashtags to maximize reach:

### **Caption 1: Feature-Focused**

Swipe right into comfort 🏡

This 3-bed beauty has natural light for days, a spacious backyard, and a kitchen that *wants* you to host brunch.

📍 849 Plaza Cuernavaca Way, San Diego

 Open House this weekend!

#SanDiegoHomes #SDRealEstate #OpenHouseSanDiego #92114Living #JustListed

Example of a well-structured AI prompt and its output. By specifying tone, format, audience, and details, you can guide AI to generate marketing-ready content—in this case, playful Instagram captions for a new home listing.

## Best Practices & AI Prompt Engineering Tips for Realtors

### ◆ General Best Practices

- **Be Specific & Contextual:**

Always provide detailed context. The more precise you are, the better the output will be.

- **Use Bullet Points for Clarity:**

Structure your initial request clearly using bullet points or numbered lists to keep prompts organized.

- **Iterate and Refine:**

Provide initial prompts, review results, then refine your instructions incrementally to perfect outcomes.

## How To Talk to AI

### ◆ General Best Practices

- **Use Clear, Specific Roles:**

Assigning AI a role like “real estate copywriter” or “listing agent assistant” gives it important context. When AI understands its persona, it tailors the response more accurately to your goals.

- **Ask For Tone and Format:**

Be specific about the tone you want—professional, casual, persuasive—and the format you need, whether it's a social caption, email, or listing paragraph. This helps the AI produce content that aligns with your communication style and audience.

- **Think Like a Director:**

Treat the AI like a team member you're giving creative direction to. The more context, constraints, and intention you provide, the more on-target the results will be.

## Prompt Engineering Ideas Specifically for Realtors

### 1. Listing Descriptions that Sell

- Prompt:
  - Here are property details:
    - **Address:** [Property Address]
    - **Bedrooms/Bathrooms:** [#bed/#bath]
    - **Key features:** [pool, ocean view, modern kitchen, etc.]
    - **Desired tone:** [luxurious, family-friendly, cozy, etc.]

**Write a compelling MLS description to attract potential buyers.**



## 2. Personalized Email Marketing

- Prompt:
  - Create a friendly and professional email campaign for past clients:
    - **Goal:** Generate referrals
    - **Offer:** Free home value assessment
    - **Tone:** Personal, engaging, appreciative
    - **Call to Action:** Contact me directly or schedule online

**Provide a catchy subject line and short body copy.**

## 3. Creating Engaging Social Media Posts

- Prompt:
  - Generate 5 short, engaging Instagram captions to showcase a new listing:
    - **Style:** Playful and informative
    - **Emphasis:** Home features, local community perks, open-house announcement
    - **Hashtags:** relevant, local hashtags

**Include emojis for higher engagement.**

## 4. Automate Market Update Summaries

- Prompt:
  - Summarize the current real estate market for [Orange County/San Diego] based on this data:
    - **Median home price:** [Price]
    - **Inventory levels:** [High/Low]
    - **Interest rate trends:** [up/down/stable]
    - Buyer/seller market indicators

**Create a concise, positive, and clear summary I can share monthly.**

## 5. Community Guide and Neighborhood Highlights

- Prompt:
  - Craft a neighborhood guide for buyers moving to {Neighborhood/City}:
    - **Highlight:** schools, restaurants, parks, and community events
    - **Style:** welcoming and informative
    - **Audience:** Families, professionals, retirees

**Format as short bullet points for easy reading.**

## 🌟 Advanced Techniques

### 1. “Brain Dump” (My Favorite!)

- Prompt:
  - I’m going to give you a raw data "brain dump" of everything I have in mind about a marketing campaign or property description. Take this raw data and craft it into a structured, highly-effective prompt that I can use to generate exactly what I want from ChatGPT.

**[Insert your unstructured ideas here]**

## 2. Scenario-Based Role Playing

- Prompt:
  - Act as an experienced real estate sales trainer. Create a detailed role-play scenario for:
    - Handling price objections from buyers
    - Negotiating multiple-offer situations

**Provide conversational scripts and alternative responses for different client personality types.**



## 3. Automated Follow-up Scripts

- Prompt:
  - Create a set of concise, polite, and professional follow-up scripts for leads:
    - **Scenario 1:** After open house visit
    - **Scenario 2:** 3 days after online inquiry
    - **Scenario 3:** 1 week after showing homes

**Include clear calls-to-action**

## 4. Video Script Creation

- Prompt:
  - Create an engaging, friendly 60-second video script introducing myself as a local real estate expert, including:
    - Brief personal introduction
    - Highlighting unique service value (personalized service, area expertise)
    - A clear invitation for viewers to contact me for a no-obligation consultation

## What to Avoid: AI Prompting Pitfalls

- Overly vague prompts = junk output
- Forgetting to fact-check
- Using AI content without editing
- Relying on AI to do your job vs enhance it





## Quick Tips to Maximize Generative AI Efficiency:

- **Ask ChatGPT for Alternatives:**

Prompt: "Give me two alternative versions of this..."

- **Ask for Formatting:**

Prompt: "Format this information into bullet points/table/social media post."

- **Ask for Tone Adjustments:**

Prompt: "Rewrite this in a more persuasive/casual/professional tone."



## Action Steps for Realtors

- Start with simple tasks (listing descriptions, emails).
- Progress to complex scenarios (role-playing, market updates).
- Regularly experiment with different prompt styles for fresh content.
- Always refine your prompts based on the quality of output

A man in a suit and glasses stands on the left, gesturing with his hand while talking to a smiling couple. The couple, a man and a woman, stand on the right, looking towards the man in the suit. They are in a modern living room with a patterned sofa. The entire image is overlaid with a blue tint.

WHY WORK WITH CALIFORNIA LENDING GROUP?

# Why Choose **California Lending Group** Over other Mortgage Lenders?

## **Personalized Mortgage Solutions**

Tailoring a wide array of mortgage products and investment tools to meet each customer's specific needs, ensuring quality service and individual attention.





## Why Choose **California Lending Group** Over other Mortgage Lenders?

### **Advanced Technology Utilization**

Leveraging modern technology to provide a productive environment, including secure online loan applications, pre-qualification processes, and interactive calculators for evaluating financing options.



# Why Choose **California Lending Group** Over other Mortgage Lenders?

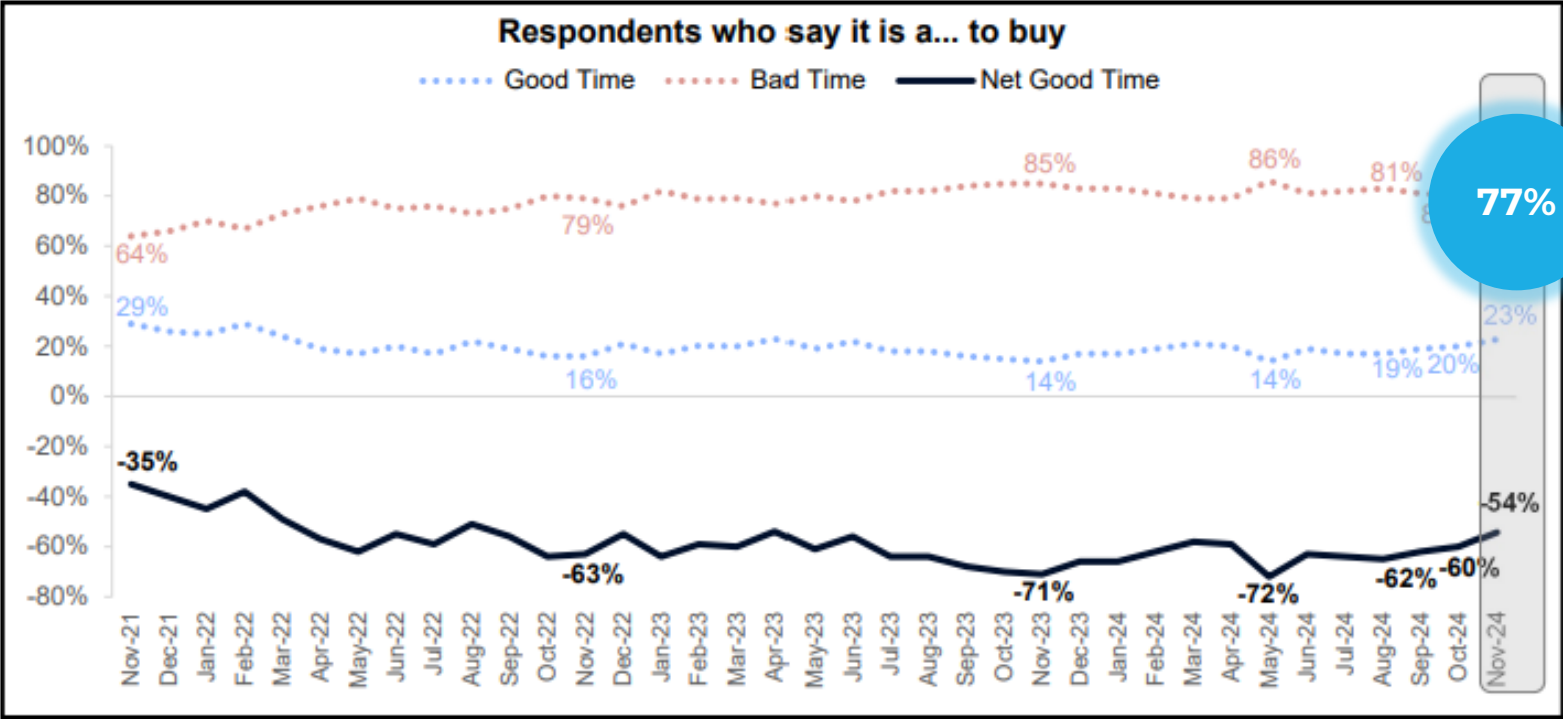
## **Comprehensive Client Support**

Guiding clients through the mortgage lending process step-by-step, with loan officers serving as single points of contact, available via phone, text, and email 24/7.



# OVERCOMING MARKET OBJECTIONS

Our free refinance offer helps you overcome objections about high rates by emphasizing **long-term value**



The share of consumers who say it is a bad time to sell remained unchanged at 35%, and the share who say it's a good time to sell also remained unchanged at 64%. As a result, the net share of consumers who say it is a good time to sell stayed the same month over month at 29%.

# REALTOR SUPPORT SERVICES

We co-brand gifting services to strengthen the bond with your clients. Think of us as an extension of your team!



Open & Close Escrow Gift Boxes & Branded Letter (0 – 21 days)

# REALTOR SUPPORT SERVICES

We co-brand gifting services to strengthen the bond with your clients. Think of us as an extension of your team!



Month 8  
(New Gift Box)

Month 4  
(New Gift Box)



Month 12  
(New Gift Box)

## **Bonus Insight: IRS Rule 936 – Mortgage Interest Deduction**

- **Mortgage Interest Limits:** Deduction capped at **\$750K** loan amount.
- **Debt Purpose Matters:** Interest deductible if loan used for **purchase or home improvements**.
- **90-Day Cash Rule:** Cash buyers must refinance within **90 days** for deductions.
- **Keep Good Records:** Document home improvements for proof.
- **Go-To Resource:** Refer clients directly to **IRS Pub 936** for clarity.

### **We Are More Than Just Loans**

At CLG, we go beyond rates and approvals. We share practical insights like IRS Rule 936 because we believe smart agents close stronger deals. Our goal is to empower you with real-world strategies you can use right away to stand out and stay ahead.



# Our Clients **Love** Working With Us!



Wonderful experience! The process was quick and to the point and the customer service was great. Highly recommend!

**-Gabriela Calin** ★★★★★



Absolutely the best mortgage broker I've ever worked with. Honest, highly competent and responsive. You won't be disappointed with the service you receive.

**- Shelley Patton** ★★★★★



If you looking to buy a house and you need a really honest person who could help you to buy it and get your finance going through I have a highly recommend Mr. Shawn

**- William S.** ★★★★★



My family had a positive experience purchasing a home with the help of Shawn and his team. I would highly recommend if you are looking to secure a house yourself.

**- Rania Ammar** ★★★★★

## Realtors **Love** Working With Us!



Shawn and his team are top notch! He delivers quick results and great communication throughout the transaction.

- **Mayra Conde** ★★★★★



I've been working with Shawn for almost ten years now and he is an absolute gem! My clients appreciate his responsiveness, clarity, and friendliness. He is on top of the market and lending changes and knows how to get the job done. When we work together, I know the transaction will go smoothly!

- **Michelle R.** ★★★★★



"I'm incredibly impressed with Shawn and his team. He went above and beyond to save a transaction I was working on and even closed early! Since then, he's worked on another purchase with one of my buyers, and the experience has been amazing. Shawn is intelligent, transparent, and an absolute pleasure to work with. I'm thrilled to have met him and will be giving him all my business moving forward."

- **Amy Parks** ★★★★★



Amazing mortgage broker! Out of my 21 years in the business, Shawn and his team are top notch and surpassed my expectations on every level. My buyers were extremely happy as well as the listing agent who had Shawn save a purchase deal of her own and closed in lightening speed! Highly recommend! I would have Shawn obtain a mortgage loan for myself on my future purchases!

- **Yen Chen** ★★★★★



# CONTACT US

We've been helping customers afford the home of their dreams for many years and we love what we do.



**Scan this QR code** to make an appointment with Shawn and the California Lending Group Team!

 **PHONE:** (949) 500-1289

 **EMAIL:** shawn@clendinggroup.com

 **WEBSITE:** [www.clendinggroup.com](http://www.clendinggroup.com)



Q & A

---



Thank You For Attending!

