

# 4AIWorld Real Estate AI Prompt Pack

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Copy-and-paste prompts for listing drafts, client communication, lead follow-up, CRM notes, transaction checklists, compliance workflows, and safer AI use.

## Usage Rules & Workflow

- **Review-First Rule:** AI drafts, summarizes, and extracts. You remain responsible for facts, fair housing, privacy, and final decisions.
- **Protect Privacy:** NEVER upload sensitive client data, financials, or private negotiation details into AI tools. Use placeholders (e.g., [CLIENT NAME]).
- **Ground in Facts:** Use Prompt 1 to establish verified facts. Never let AI invent features, neighborhood claims, or pricing.
- **Workflow:** Context → Draft → Verify claims → Professional approval → Publish.

## Prompt Directory

#	Prompt	Use it for
1	Real Estate Context Builder	Build a reusable context profile for the listing, client, lead, or transaction.
2	Source-Grounded Draft Builder	Create first drafts from approved source material only.
3	Lead Follow-Up System	Turn lead or open house notes into reviewed follow-up actions.
4	CRM Notes & Pipeline Update	Convert conversations into structured CRM notes without overclaiming.
5	Transaction Checklist Builder	Organize transaction work into a clear task list for human review.
6	Knowledge Retrieval Client Answer	Answer client questions from approved materials only.
7	Escalation Detection	Spot messages that should not be handled by automation alone.
8	Promise, Claim, and Risk Review	Review copy for unsupported claims, guarantees, and risk language.
9	Neighborhood Profile Drafter	Draft engaging, fair-housing compliant overviews of local communities.
10	Workflow SOP Generator	Turn a repeatable AI workflow into a simple standard operating procedure.
11	Prompt Improvement	Improve a weak prompt into a safer, stronger real estate prompt.

**Continue Learning:** Return to Step 3 of the Real Estate AI Learning Path at <https://4aiworld.com/ai-for-real-estate-videos/#real-estate-video-step-3>

# 1. Real Estate Context Builder

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**Purpose:** Build a reusable context profile for the listing, client, lead, or transaction before asking AI to draft anything.

**Use when:** You are starting a new project (e.g., a new listing, a new buyer profile) and need to establish strict facts before generating content.

## Copy-and-paste or upload engineered prompt

Act as a Real Estate Strategy Assistant. Help me prepare an AI-supported real estate workflow. Use ONLY the information provided below. Do not assume any details.

Source Material:

[paste or upload property facts, MLS details, seller notes, buyer needs, showing notes, lead source, CRM notes, brokerage rules, brand voice, and compliance limits]

Task:

Create a concise, structured context brief. Do NOT draft any marketing copy or outbound messages yet.

Return:

1. Workflow goal (e.g., listing marketing, buyer follow-up)
2. Target audience
3. Verified facts (bulleted list of confirmed data)
4. Unknowns that must NOT be invented (e.g., HOA fees, exact square footage)
5. Tone and brand constraints
6. Fair housing and privacy constraints specific to this data
7. Items needing broker, legal, or professional review
8. Suggested next prompt to use based on this context

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**

## 2. Source-Grounded Listing or Client Draft Builder

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**Purpose:** Create first drafts from approved source material only, preparing for claim and privacy review.

**Use when:** You need to write MLS descriptions, social media captions, showing follow-ups, or client updates based strictly on facts.

### Copy-and-paste or upload engineered prompt

Act as a Real Estate Copywriter. Use the context brief and source material provided below to draft the requested content.

Content Type: [listing description / client email / showing follow-up / seller update / buyer update / social caption / open house message]

Source Material: [paste verified facts, context brief, or upload approved notes]

Tone: [professional / warm / concise / luxury / approachable]

Strict Requirements:

- Use ONLY verified facts from the source material.
- Do NOT invent features, neighborhood claims, pricing claims, school rankings, commute times, safety claims, or demographic statements.
- Adhere strictly to Fair Housing guidelines.
- Include [Bracketed Placeholders] for any missing but necessary facts instead of guessing.

Return:

1. The drafted content
2. A Review Checklist containing: unsupported claims to manually verify, fair housing language to double-check, privacy items to potentially remove, and questions I must answer before sending/publishing.

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**

### 3. Lead Follow-Up and Next-Step System

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**Purpose:** Turn lead or open house notes into reviewed follow-up actions.

**Use when:** You have raw notes from an open house, a Zillow/Realtor.com inquiry, or a phone call, and need a clear follow-up plan.

#### **Copy-and-paste or upload engineered prompt**

Act as an Inside Sales Agent (ISA) Assistant. Process the raw lead details below into a structured follow-up plan.

Lead Information:

[Paste lead details, inquiry source, notes, timeline, budget range if provided, preferred property types, location interests, and prior conversations]

Strict Requirements:

- Avoid assumptions about protected traits, family status, neighborhood fit, safety, schools, or financial qualification beyond exactly what the lead stated.

Return:

1. Lead Summary: 2-3 sentences summarizing their stated situation.
2. Next Best Action: The single most logical next step based ONLY on stated info.
3. Follow-up Message 1: A short, professional draft (email or text) focusing on providing value.
4. Follow-up Message 2: An alternative, softer check-in option.
5. CRM Data: A bulleted list of fields/tags to update in my CRM.
6. Missing Info: Questions to ask the lead to qualify them further.
7. Human Review Flags: Highlight anything that needs my review before sending (e.g., pricing discussions).

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**

## 4. CRM Notes and Pipeline Update

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**Purpose:** Convert conversations into structured CRM notes without overclaiming.

**Use when:** You've just finished a client meeting, showing, or call and need to log the interaction cleanly in your database.

### Copy-and-paste or upload engineered prompt

Act as a Real Estate CRM Assistant. Convert the raw notes below into clean, structured CRM entries.

Raw Interaction Notes:

[Paste call notes, text messages, emails, showing feedback, or meeting notes]

Strict Requirements:

- Separate facts from interpretations. Label any assumptions explicitly as "Assumption:".
- Do not include sensitive financial account numbers or personal identification data (SSN, etc.) in the summary.

Return the following structure:

1. Contact Summary: Brief overview of the interaction.
2. Stated Needs & Timeline: What they explicitly told me.
3. Budget/Financing: Only include if explicitly stated; otherwise mark "Unknown".
4. Properties Discussed: Addresses or criteria mentioned.
5. Objections/Concerns: Any roadblocks mentioned.
6. Action Items: Follow-up promises, deadlines, and the next task owner.
7. Open Questions: What we still need to figure out.
8. Risk Warning: Flag any recorded promises, offer terms, or private negotiation strategies that should be handled with care.

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**

## 5. Transaction Checklist and Timeline Builder

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**Purpose:** Organize transaction work into a clear task list for human review.

**Use when:** A property goes under contract and you need to map out dates, contingencies, and responsibilities.

### **Copy-and-paste or upload engineered prompt**

Act as a Transaction Coordinator Assistant. Organize the provided transaction details into a clear task list and timeline.

Transaction Details:

[Paste transaction stage, milestone dates, document list, client role, broker/team process, lender/title/inspection notes, and any approved checklist]

Strict Requirements:

- Do NOT provide legal advice, contract interpretation, deadline guarantees, or disclosure decisions.
- Base all dates strictly on the provided text.

Return a table or structured list including:

1. Task Name
2. Owner (Agent, Client, Lender, Title, etc.)
3. Due Date or Timing
4. Source Document reference
5. Client-Facing Reminder: A short, friendly draft to remind the client of this step.
6. Internal Notes / Missing Information
7. Review Flags: Explicitly flag items that require broker, attorney, lender, title, or inspector review.

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**

## 6. Knowledge Retrieval Client Answer

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**Purpose:** Answer client questions from approved materials only.

**Use when:** A client asks a complex question about the buying/selling process, brokerage fees, or local market, and you want to use your pre-approved templates to answer.

### **Copy-and-paste or upload engineered prompt**

Act as a Client Education Assistant. Answer the client's question using ONLY the approved materials provided.

Approved Materials:

[Paste or upload approved brokerage FAQs, listing notes, market update, transaction process notes, or client education material]

Client Question:

[Paste the exact client question]

Strict Requirements:

- Keep the answer clear, helpful, and strictly non-legal.
- If the answer is NOT fully contained in the materials, state what is missing and suggest a safe next step (e.g., "I will check with the title company"). Do not guess.

Return:

1. Full Answer Draft
2. Short Draft (suitable for a quick text message)
3. Source Notes Used (where the info came from)
4. Verification Warning: Highlight any wording that could inadvertently create a promise, guarantee, or legal interpretation.

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**

## 7. Escalation Detection for Real Estate Messages

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**Purpose:** Spot messages that should not be handled by automation alone.

**Use when:** You are processing an inbox or reviewing a message that feels complicated, legally sensitive, or emotionally charged.

### Copy-and-paste or upload engineered prompt

Act as a Real Estate Risk Management Assistant. Review the message below and identify whether it can be handled with a simple drafted response or if it requires human escalation.

Message to Review:

[Paste client, lead, vendor, or transaction message]

Scan for the following Risk Triggers:

Legal questions, contract interpretation, disclosure issues, fair housing concerns, pricing/negotiation strategy, private financial information, complaints/disputes, urgent deadlines, safety issues, protected-class language, offer terms, inspection problems, title/lender issues, or brokerage policy questions.

Return:

1. Escalation Level: (Low, Medium, High)
2. Reason for Escalation: (Which risk triggers were hit)
3. Reviewer Recommendation: (Who should handle this: Agent, Broker, Attorney, Lender, etc.)
4. Safe Holding Response: A polite, neutral reply acknowledging receipt without making promises or answering the core question.
5. What NOT to say: Guidance on phrases to avoid in this specific situation.

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**

## 8. Promise, Claim, and Risk Review

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**Purpose:** Review copy for unsupported claims, guarantees, and risk language before publication.

**Use when:** You have a drafted property description, email blast, or social media post and want to double-check it for compliance and accuracy.

### **Copy-and-paste or upload engineered prompt**

Act as a Real Estate Advertising Compliance Assistant. Review the AI-assisted content below against the verified source material before I publish or send it.

Verified Source Material:

[Paste or upload verified source facts]

Drafted Content to Review:

[Paste draft]

Task:

Find and categorize any of the following: unsupported property claims, invented amenities, unverified neighborhood statements, school or commute claims, pricing or value promises, legal or disclosure-sensitive statements, guaranteed outcomes, pressure language, and statements that need professional review.

Return:

1. List of Issues Found (categorized by the types above)
2. Safer Rewrites: Provide an alternative sentence for each issue found.
3. Verification Questions: List facts I need to manually check.
4. Final Recommendation: Pass, Revise, or Do Not Use.

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**

## 9. Neighborhood & Community Profile Drafter

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**Purpose:** Draft engaging, fair-housing compliant overviews of local communities.

**Use when:** You are creating relocation guides, website area profiles, or marketing materials for specific neighborhoods.

### **Copy-and-paste or upload engineered prompt**

Act as a Real Estate Community Expert. Use the verified local facts provided below to draft a compelling neighborhood profile.

Neighborhood/Community: [Insert Name]

Verified Local Facts: [Paste facts like proximity to transit, parks, known development projects, public amenities, architectural styles]

Strict Requirements:

- Focus purely on geography, amenities, architecture, and lifestyle features (e.g., parks, walkability, local businesses).
- Do NOT make demographic statements, describe the "type" of people who live there, or use exclusionary language.
- Adhere strictly to Fair Housing guidelines.
- Do not invent future developments or property appreciation claims.

Return:

1. An engaging, 2-3 paragraph community overview.
2. A bulleted list of 3-4 top community highlights.
3. Fair Housing Check: A confirmation that the language focuses on the property and amenities, not the people.

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**

## 10. Real Estate Workflow SOP Generator

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**Purpose:** Turn a repeatable AI workflow into a simple standard operating procedure.

**Use when:** You have figured out a great way to use AI for a task (like listing descriptions) and want to document it so your team or VA can do it safely.

### **Copy-and-paste or upload engineered prompt**

Act as a Real Estate Operations Manager. Create a one-page Standard Operating Procedure (SOP) for the real estate AI workflow described below.

Workflow Details:

Topic: [listing copy / lead follow-up / CRM notes / open house recap / transaction checklist / local content]

Source Materials/Process Notes: [paste any rules, tools used, and current steps]

Strict Requirements:

- Keep the workflow "Review-First". Do not allow AI to make final legal, pricing, disclosure, negotiation, compliance, or representation decisions.

Return a structured SOP containing:

1. Purpose & When to Use
2. Inputs Required (What data must be gathered first)
3. Prompt Steps (The exact prompts to run)
4. Review Checklist (What the human must verify: fair housing, facts, etc.)
5. Prohibited Uses (What NOT to do with this workflow)
6. Approval Owner (Who has the final say)
7. Output Storage (Where the final product goes)

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**

## 11. Prompt Improvement for Real Estate Workflows

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**Purpose:** Improve a weak prompt into a safer, stronger, source-grounded real estate prompt.

**Use when:** You have a basic prompt that isn't giving you the quality, safety, or formatting you need for your real estate business.

### Copy-and-paste or upload engineered prompt

Act as a Real Estate AI Prompt Engineer. Improve the weak prompt below to make it safe, highly structured, and source-grounded for a real estate professional.

Current Prompt:

[Paste your current weak prompt]

Desired Outcome:

[Describe what you actually want the AI to do]

Task:

Rewrite the prompt to explicitly include:

- Role & Goal
- Audience
- Placeholder for Source Material
- "Verified-facts-only" instruction
- Missing-information behavior (no hallucinating)
- Tone & Format specifications
- Fair Housing and Privacy guardrails
- Final human review step request

Return:

1. Critique: What was weak or risky about the original prompt.
2. The Engineered Prompt: The new, improved, copy-paste ready version.
3. Reusable Template: A shorter version I can save in my prompt library.

**Review-first reminder: Verify facts, remove private data, check fair housing and claim risk, and get qualified review before use.**