2027 BUSINESS PLAN WORKSHOP | BONUS

30 Jobs You Can Hand to AI

AI drafts, you decide and send. Review anything with a client's name on it.

How to use it: open ChatGPT, Claude, or Gemini, paste in the real stuff (the CMA, the export, the voice memo), and ask in your own words. Leave out private numbers like Social Security, bank, and loan account numbers.

SELLERS AND LISTINGS

1. **Friday seller update**
   Turn this week's showings, feedback, and online views into a Friday update so my seller feels informed, not managed.
2. **Walkthrough to MLS remarks**
   Turn my walkthrough voice memo into MLS remarks and flag any fair housing problems.
3. **Pre-listing packet**
   Build a pre-listing packet for my seller from this CMA.
4. **Price-reduction prep**
   Help me prep a price-reduction conversation with these numbers, in plain words.
5. **Competing listings watch**
   Compare this week's competing listings to last week's and tell me only what changed.
6. **Room-by-room prep list**
   Make a room-by-room list my seller can work through before photos.

BUYERS

7. **Monthly payment comparison**
   Compare these homes on monthly cost with taxes, HOA, and insurance. Leave the rate to my lender.
8. **Showing day itinerary**
   Put these showings in order with drive times and build the day.
9. **HOA packet summary**
   Summarize this HOA packet: the rules, fees, and limits that matter to this buyer.
10. **Post-showing follow-up**
    Write a follow-up after today's showing that asks one useful question.

CONTRACTS AND CLOSING

11. **Repair amendment draft**
    Draft a repair amendment from these inspection findings for me and my attorney to review.
12. **"What you are signing" email**
    Explain this document in a plain-English email so my client knows what they are signing.
13. **Redline check**
    Compare these two contract versions and list exactly which clauses changed.
14. **Tax-time reminder**
    Turn this closing statement into a tax-time reminder for my client. No tax advice.

PAST CLIENTS AND REFERRALS

15. **Who is overdue for a touch**
    From my database export, list the past clients I have not reached out to in too long.
16. **Home anniversary note**
    Write a home purchase anniversary note with zero sales ask.
17. **Referral ask, done right**
    Write a referral ask that follows a real value touch, never a cold one.

MARKETING AND CONTENT

18. **One piece, four ways**
    Turn this one piece into a blog post, a carousel, a reel script, and an email.
19. **One call, a week of posts**
    Turn this recorded call into a week of social posts.
20. **Hyperlocal market post**
    Write a local market post from this live data and name the source.
21. **Client story case study**
    Turn this client story into an anonymized case study with no results claims.
22. **Why the ad stopped working**
    Tell me why this ad stopped working, then give me one change to test.
23. **Ad copy that fits the image**
    Write ad copy that matches the image it runs with.

YOUR BUSINESS AND BACK OFFICE

24. **Goals to weekly time blocks**
    Turn my workbook goals into weekly time blocks I can put on my calendar.
25. **Bank export for your CPA**
    Sort this bank export into categories my accountant can use.
26. **Car memos to a task list**
    Turn my voice memos from the car into one clean task list.
27. **Automation check**
    Compare what should have run this week with what did, and flag anything that failed quietly.
28. **SOP from a recording**
    Turn this screen recording or voice walk-through into a step-by-step SOP.
29. **Your first hire**
    Write a job post and an interview scorecard for my first hire.
30. **Make it check itself**
    List what in your last answer could be wrong and how I can verify it.

Bonus: The 12-Month Client Connection Calendar is on its own handout. 12 months of past-client touches that help, never sell.