



MIDDLETON ELITE COACHING

From Using AI to Building With It

A Starter Kit

The Strategic Foundation Interview

The Brand Voice Kit

The Three-Purpose Recording Framework

HOW TO USE THIS KIT

Three Foundations, in One Place

In the AI Implementation Part One webinar, I walked through three foundational moves for agents who want to stop using AI as a task tool and start building with it as infrastructure. This kit contains the bonus material referenced in each section.

Three artifacts. One purpose: give you what you need to start this week.

Bonus 1 — The Strategic Foundation Interview. Eight self-interview questions that capture the orienting context AI needs to think like you about your business. Pairs with **Move 1: Build a Knowledge Base of Your Own IP.**

Bonus 2 — The Brand Voice Kit. Twelve specific inputs to give Claude. Turns 'brand voice' from a vague concept into a defined input. Pairs with **Move 2: Marketing That Actually Sounds Like You.**

Bonus 3 — The Three-Purpose Recording Framework. Every recording produces three distinct artifacts. Includes the Document-vs-Create reframe that turns documenting what you're already doing into an internal training library. Pairs with **Move 3: Sharper Client Conversations.**

These are starters, not the full system. The work above them — organizing the IP so it compounds, codifying the brand voice as a binding spec, building the IP extraction discipline at scale — is what coaching engagements deliver. Start with what's here. It will get you to useful.

BONUS ONE

The Strategic Foundation Interview

Most AI output disappoints because the AI doesn't know who you are or what your business does. Answer the eight questions below — in writing or by recording yourself and transcribing — then paste your answers into a Claude project titled *Strategic Foundation*. Claude will reference it on every future query in that project.

The eight questions

01. Who do you serve?

Describe your ideal client in real specifics — not demographics, but the situation they're in, the outcome they need, the way they make decisions.

02. Who do you NOT serve?

Be specific. Who do you decline, redirect, or walk away from? Saying who you're not for sharpens who you are for.

03. What do you do that's actually distinctive?

Not what your marketing claims. What do clients who've worked with you say is genuinely different about how you operate?

04. What principles guide your work?

The non-negotiables. The lines you don't cross even when it costs you. The things you'd say to a new team member on day one.

05. What frameworks or methods do you use repeatedly?

The named or unnamed structures you reach for. The questions you ask in client meetings. The way you diagnose a problem.

06. What's a win that taught you the most?

One specific story. What happened, what you did, why it worked, what you still apply today.

07. What's a loss that taught you more?

One specific story. Same structure. The thing that went wrong and made you better.

08. If your business doubled in three years, what would have to be true?

Forces you to articulate where you're going, not just where you are. AI uses this to anticipate, not just to react.

What you do with the answers is more important than how polished they are. Get them written. Get them into Claude. Start querying.

BONUS TWO

The Brand Voice Kit

Generic AI output is the giveaway. The way you fix it is teaching AI your voice — and the way you teach voice is giving it the right inputs.

Each item below is a piece of information AI needs about how you write. Together they turn 'brand voice' from a vague concept into a defined input that produces output that actually sounds like you.

The twelve inputs

01. Three to five samples of your own writing you're proud of

These are the gold standard. Pick pieces that show range — short and long, professional and casual. AI uses these to learn what 'good' looks like in your voice.

02. Three to five samples of writing you'd never publish

Equally important. AI learns the boundaries of your voice by seeing what falls outside them. Find a generic email, a stock listing description, a corporate-sounding LinkedIn post — anything that's the opposite of how you'd write.

03. Words and phrases you do use

The vocabulary that signals you wrote it. The specific terms, the slang, the technical language, the recurring metaphors. Anything you reach for repeatedly.

04. Words and phrases you don't use

What you actively avoid. 'Reach out,' 'circle back,' 'leverage,' 'utilize,' 'in today's market,' 'unlock your potential' — list everything that makes you cringe when you see it elsewhere.

05. Your stance on contractions, formality, and length

Do you use contractions? Are you formal or casual? Do you write long or short by default? These structural defaults shape every sentence.

06. Your stance on humor, sarcasm, and irony

How playful are you? Do you go in for dry humor, earnest warmth, or no humor at all? Setting this prevents AI from defaulting to corporate-jovial.

The Brand Voice Kit

07. How you handle disagreement or pushback

Do you push back directly, ask questions, soften with curiosity, or step back? Your conflict style is part of your voice and shows up in everything from emails to negotiations.

08. How you talk about money and pricing

Direct or indirect? Confident or apologetic? Do you justify, explain, or simply state? Money language reveals more than any other category.

09. Your relationship to data and citations

Do you cite sources? Use statistics? Lean on stories instead? AI learns whether to ground your output in numbers or narrative.

10. The single reader you're writing to

Picture one real person. What do they do? What do they care about? What do they already know? AI writes much better for one named reader than for 'real estate agents.'

11. Common opening and closing patterns

How do you start a piece? How do you end one? Most writers have signature moves — the question opener, the story opener, the contrarian opener, the data-point closer. Name yours.

12. The 'tells' that make your writing recognizable

The things that, if someone showed you a paragraph, would let you say 'that's mine.' Sentence length variation, paragraph rhythm, recurring images, the way you handle transitions. The fingerprint.

How to use it

Answer each item — short notes are fine; full sentences not required. Compile into a single document titled *Brand Voice Spec*. Drop it into a Claude project as the first document. From that point on, every piece of content you ask Claude to write in that project will be filtered through your voice — not the average internet voice.

The first draft of your Brand Voice Spec doesn't have to be perfect. It just has to exist. Refine it over time as you notice patterns in what Claude gets right and what it still misses.

BONUS THREE

The Three-Purpose Recording Framework

Every appointment, every coaching call, every team meeting is producing value that's currently being lost the moment the conversation ends. Recording (with permission) captures that value. The framework below describes the three distinct artifacts every recording should produce.

One conversation. Three audiences. Three artifacts.

Artifact one — the client-facing summary

The polished version sent to the client (or to the team member if it was an internal conversation). Captures what was discussed, what was decided, what each party committed to, and what comes next. The version that makes the client feel deeply heard and gives them something useful to act on.

What goes in: commitments, decisions, next steps, the highlights of what they shared, anything they explicitly asked you to remember or follow up on.

What stays out: your private observations, your strategic read on the conversation, anything they shared in confidence that doesn't need to be reflected back to them.

Timing: sent within one to two business days of the conversation. The freshness matters.

Artifact two — the internal summary

The version that stays with you and your team. Includes everything the client gets, plus your private observations, the threads you'd want to pull on next time, the patterns you noticed in how they made decisions, anything that would inform how you show up to the next meeting.

What goes in: your read on what they're really worried about, what's likely to come up next, things to bring up next time, observations about their communication style or decision-making patterns.

Where it lives: in a private project knowledge base for that client. Searchable before every future conversation with them.

The Three-Purpose Recording Framework

Artifact three — the de-identified IP

The version that becomes part of your library. The same conversation, with client names and identifying business details stripped out, kept only for the frameworks, the coaching moves, the language patterns, the questions that worked.

De-identification at the basic level: remove the client's name, their business name, their specific market, any details that would identify them or their business. Keep the structural lessons.

What this becomes: the foundation of an internal training library. Over time, across hundreds of recordings, you accumulate a body of de-identified IP that any team member can search — and that AI can use as the basis for training, prep, and pattern recognition.

A deeper IP extraction protocol — including how to identify the highest-value moments in a recording and how to structure the library for long-term retrievability — is part of the work MEC does directly with team owners.

The Document-vs-Create reframe

Gary Vee said it at Agent 2021 in 2017. I was in the room. The line was: *don't create content — document what you're already doing.*

Most team leaders know they should have an internal training library. They never build it because building a training course feels like another full-time project on top of everything else.

The reframe: stop trying to build a training course. Start documenting the work you're already doing. The appointments are happening anyway. The coaching is happening anyway. The 1-on-1s are happening anyway. AI changes the cost of capturing that work from *days per recording* to *minutes per recording*.

The competitive advantage of your business lives in your brain. Right now, the only way your team accesses it is by waiting — for the next meeting, the next 1-on-1, for years of experience to close the gap. AI changes the cost equation. Recording what's already happening turns your brain into something your team can query on demand.

THIS WEEK

Three Things to Do — Roughly

The starters from the webinar, in one place. Don't wait until you have time to do them perfectly — you won't. Do them roughly. See what happens.

From Move 1 — Build a knowledge base

Open a Claude project. Drop in three documents — your business plan, your scripts, your most recent quarterly review. Spend fifteen minutes asking it questions. That's it.

From Move 2 — Marketing that sounds like you

Paste three of your favorite pieces of your own writing into a Claude project. Ask Claude what's distinctive about how you write. Then give it a topic and ask for 200 words in your voice. Compare to a generic ChatGPT version of the same prompt.

From Move 3 — Sharper client conversations

Ask permission to record one client appointment this week. Upload the transcript to a Claude project. Extract three things: (a) what the client committed to, (b) what you committed to, (c) what they said you'd want to remember a month from now.

Do these three things this week. Then watch for Part Two.

Middleton Elite Coaching works with top-producing real estate teams to build the AI infrastructure described in this kit at depth — from IP architecture to brand voice specification to internal training systems. Learn more at middletonelitecoaching.com.