

# AI Implementation for Real Estate Teams

*Part One*

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May 2026

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# Agenda

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## 01 The Gap

Why most agents are getting weak AI results — and what's different about agents who build with AI

## 02 A Knowledge Base of Your Own IP

Capturing your frameworks, scripts, and methodology so your team can use them on demand

## 03 Marketing That Actually Sounds Like You

Brand voice + your data, not generic AI output. Teaching AI to write the way you write.

## 04 Sharper Client Conversations

Recording appointments, surfacing the nuance, building a training library by documenting work you're already doing

*If you've tried AI and walked away thinking it's not as useful as everyone claims...*

**You're not wrong about the lackluster result.**

**Let's re-think why it's lackluster.**

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# Use AI vs. Build with AI

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## USE

### Treats AI as a task tool

- Asks one-off questions
- Gets generic answers
- No memory, no context
- Each session starts from zero
- Upgrade to a single task

## BUILD

### Treats AI as infrastructure

- Feeds it your IP, voice, context
- Gets answers in your voice
- Memory and history compound
- Each session builds on the last
- Structural change to the business

*There's a widening gap between*

**agents who use AI**

**and agents who *build* with it.**

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*The first group is getting marginal upgrades.  
The second group is changing what's possible.*



# Two months of Building at MEC

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## THEN

### Roughly two months ago

- Coaching IP scattered across notes, drives, recordings
- Mostly accessible to me — mostly inaccessible to my team
- Repeating the same answers in 1-on-1s and meetings
- Generic ChatGPT for one-off tasks; nothing compounded

## NOW

### After 60ish days of building

- Coaching IP organized into project knowledge bases
- Team queries methodology directly instead of asking me
- Content production cadence and consistency dramatically up
- Every coaching call making the next one sharper

# Why Claude

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*Everything I'm walking through today runs on Claude (paid version).*

## — Long-form context

Handles document-heavy work — the kind of long context windows real estate coaching IP requires.

## — Preserves voice

Generates content that actually sounds like you when given enough of your writing to work with.

## — Project-based structure

Projects, Project Knowledge, and Chats are the foundational architecture we'll cover today.

ONE

# Build a Knowledge Base of Your Own IP

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*So your team queries it on demand instead of asking you the same question again*

*The competitive advantage of your business*  
**lives in your brain.**

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*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 can solve that.**



# Generic In, Generic Out

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*AI's output quality is downstream of the context you give it.*

— **Default AI**

Draws on the average of everything on the internet. Produces average output. Sounds like a thoughtful committee.

— **Your business**

Isn't average. Your team isn't average. The way you talk to clients isn't average. None of that is in the model by default.

— **The fix**

Feed AI your context — your IP, your scripts, your history, your voice — and watch the output stop being generic.

# This Week

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*Open a Claude (paid version) project. Upload documents like these. Then, start asking questions.*

- 01** Your business plan or strategic plan
- 02** Your scripts or most-used response templates
- 03** Your most recent quarterly review or annual plan

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*Fifteen minutes of work. You don't need to organize anything. Just gather, then query.*

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# The Strategic Foundation Interview

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A set of self-interview questions you can answer to capture the foundation of your IP — the orienting context AI needs to think like you about your business.

## Who you serve

- The clients you're built for
- The clients you turn away
- What 'good fit' actually means

## What you do

- The principles you operate by
- The frameworks you use
- What makes your work distinctive

## What shaped you

- Wins that taught you
- Losses that taught you more
- Decisions you'd make again

*Full version in the Starter Kit PDF — sent to all registrants tomorrow.*

TWO

# Marketing That Actually Sounds Like You

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*Built on your brand voice and your data, not AI slop.*

# Generic AI output is the giveaway.

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*The whole game is teaching AI to create like you —  
and that starts with giving it enough of your work  
that it knows what 'like you' actually means.*



# AI Writes in the Voice It's Given

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The flat structure, predictable transitions, the bland-committee tone — that's not AI being bad at writing. That's AI being asked to write without any sense of who's writing.

## DEFAULT VOICE

### **Generic committee**

Sounds like everyone. Spotted immediately. Disappears in the feed.

## YOUR VOICE

### **Distinctly you**

Sounds like you wrote it. Recognizable. Trusted by your audience because the voice is consistent.

# This Week

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*Upload your best writing into a Claude project. Ask it to articulate your patterns. Then test it.*

- 01** Pick your three favorite pieces of your own writing
- 02** Upload them into a Claude project (aka files, aka project knowledge)
- 03** Ask Claude what's distinctive about how you write
- 04** Give it a topic and ask for 200 words in your voice
- 05** Compare to a generic ChatGPT output of the same prompt

# The Brand Voice Kit

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*Twelve specific inputs to give Claude. Turns 'brand voice' from a vague concept into a defined input.*

01. Three to five samples of your own writing you're proud of
02. Three to five samples of writing you'd never publish
03. Words and phrases you do use
04. Words and phrases you don't use
05. Your stance on contractions, formality, length
06. Your stance on humor, sarcasm, irony
07. How you handle disagreement or pushback
08. How you talk about money and pricing
09. Your relationship to data and citations
10. The single reader you're writing to
11. Common opening and closing patterns
12. The 'tells' that make your writing recognizable

*Full kit + how to use each input in the Starter Kit PDF.*

THREE

# Sharper Client Conversations

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*Record appointments. Surface the details you'd otherwise lose between the appointment and the office.*

*What you lose*

**between the appointment and the office**

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*What you miss, forget, or neglect to tell your team creates inefficiencies and erodes the client experience.*



# This Week

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*One client. One appointment. Record it (with permission). Extract three specific things.*

- 01 Ask permission**

Document it. Note state law on consent (varies).
- 02 Record the appointment**

Use whatever recording tool you already have.
- 03 Upload the transcript**

Drop it into a Claude project.
- 04 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.

# Every Recording, Three Purposes

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*One conversation. Three distinct artifacts. Each serving a different audience.*

FOR THE CLIENT

## Client-Facing Summary

Polished. Actionable. Makes them feel deeply heard.

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*Sent within one to two business days.*

FOR YOU + YOUR TEAM

## Internal Summary

Your private observations. Threads to pull on next time. What to bring up later.

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*Stays inside your team.*

FOR YOUR IP LIBRARY

## De-identified IP

Frameworks, language, your knowledge.. Stripped of client identifiers.

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*Feeds your knowledge base.*

***More detail on each — including the IP de-identification standard — in the Starter Kit PDF.***

*Almost every team leader I've ever worked with  
has the same hidden problem.*

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**The competitive advantage of the business  
lives in the leader's brain.**

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*The gap between what they know and what their team knows  
is closed by time, experience, trial and error.*



# Document vs. Create

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*The appointments and meetings are happening anyway.*

*The coaching is happening anyway.*

**AI changes the cost of capturing what you're already doing.**

# A Training Library — By Doing the Work

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*Instead of building a training course. Start documenting the work you're already doing.*

Your listing appointments

→ *Listing methodology training*

Your buyer consultations

→ *Buyer process training*

Your team meetings

→ *Team culture and operations training*

Your 1-on-1 coaching conversations

→ *Individual development training*

Your client problem-solving calls

→ *Real-world case study library*

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*The library builds itself. Your team starts closing the gap in weeks, not years.*

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# Three Moves, Three Starters, This Week

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01

## Knowledge Base

Dump three documents into a Claude project. Ask questions for 15 minutes.

02

## Voice

Paste your three best pieces of writing. Ask Claude what's distinctive. Test it.

03

## Conversations

Record one appointment (with permission). Extract three things from the transcript.

***Do these roughly. Don't wait until you have time to do them perfectly — you won't.***

COMING IN PART TWO

# Beyond Chats

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*This is the foundation. Part Two coming in Aug/Sept.*

WORKSPACE TOOLS

## Going Deeper Than Chat

More sophisticated workflows that integrate with how your team actually operates.

AI AGENTS

## Purpose-Built, Role-Shaped Helpers

AI built around specific functions — pipeline, communications, document drafting — that runs alongside your team.

USE CASES

## Where It Lands in Real Estate

Listing appointment prep, transaction co-pilots, sphere cultivation at scale.

BONUS MATERIALS

# From Using AI to Building With It

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- The Strategic Foundation Interview — self-interview prompts to capture your IP
- The Brand Voice Kit — 12 inputs that teach AI to write like you
- The Three-Purpose Recording Framework — every recording, three artifacts

*Sent to all registrants and available at:*

**[www.MiddletonEliteCoaching.com](http://www.MiddletonEliteCoaching.com) → Resources**

