Create <u>Personalized</u> Home Buyer Guides

In MINUTES With These

CHATGPT PROMPTS

CHATGPT PROMPTS
To Create Personalized
HOME BUYER GUIDES

Mark & Lynda's
Home Buyer Guide

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Traditional vs Personalized Home Buyer Guides

Traditional buyer guides are static, templated, and easily found online. Old-school home buyer guides aren't personalized to the individual home buyer client. They miss the one thing clients value most: relevance to them.

With AI, you can merge all the information you have for your buyer with market data to produce a client-specific home purchase plan — not a generic brochure or report.

Sending a polished, personalized guide **before** meeting creates a powerful "effort signal": buyers infer your professionalism from what you do *before* you're hired.

Step 1: Run your Initial Buyer Consultation (record it)

- Do it on Zoom or phone; focus first on trust-building and context (motivation, timing, financial posture).

- Record or transcribe the conversation so AI can format clean notes for you. You can record the call on your phone using the record feature in iPhone or Android.

- Agents note the time saved and how much easier it is to read structured notes vs. hand-scribbles — a significant lift in consultation quality.

- Use the Initial Consultation Template on the next page to guide your discussion.

- After the Initial Consultation is done, use the Initial Consultation Prompt to turn the recording into useable notes.

Create a Personalized Home Buyer Guide with AI in 5 Steps...

1. **Step 1 — Run your Initial Buyer Consultation.**
2. **Step 2 — Capture Lifestyle & Property Requirements.**
3. **Step 3 — Add local market context.**
4. **Step 4 — Generate a Personalized Home Buyer Guide with a Structured Prompt.**
5. **Step 5 – Send the Home Buyer Guide to Your Client.**

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TEMPLATE: Initial Consultation Questions

Following is a guide to using this template, and keep in mind that this is a conversation that should take between 30-45 minutes:

SOURCE: How did this person hear about us? Past Client? Referral? Social Media? Web? Agent network? The reason we ask is we always want to thank those who referred the client to us.

INTEREST: What are they most interested in accomplishing with buying / selling. Why?

EXPERIENCE: Have they bought and / or sold a home before? Have they done so recently? What real estate experience do they have, and how was it for them? What would they like to change during this process versus the last time?

TIME FRAME: When do they plan to buy / sell? What is important to them around the timeframe (work relocation, school calendar, etc.).

FINANCIAL CAPACITY: What is their financial capacity or situation? Do they have money for a down payment? Have they been pre-qualified? What is the payoff for their current home? What do they think their current home is worth? If they are already pre-qualified, who is the loan officer / if they are not, would they like a recommendation?

DECISION MAKER: Who will be involved in the decision-making process? Is it just them, them and a partner/spouse, parents, or anyone else they rely on for making the decision?

CONCERNS: What are their concerns about buying / selling right now? Do they have any concerns about the current marketplace, interest rates, making a financial commitment to a home?

OBJECTIVES: What are their ultimate objectives for buying / selling? In other words, if they could share with you the most important outcome that the move would accomplish, what is that?

REVIEW: Go back over the information they just gave you. TIP: use their exact language - do NOT improvise. By using their exact language, they will understand that you really listened to them and are not trying to put words into their mouths.

NEXT STEPS: Explain next steps and set an appointment.

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PROMPT: Initial Consultation Report

This is a transcript of a phone call between a real estate agent and their prospective client. The real estate agent is doing an Initial Consultation with prospective clients on buying or selling a home. Create a report of this call using the format below.

IMPORTANT INSTRUCTIONS:
- For each section, provide a thorough summary of what the client said.
- Include references to the prospective client's exact language – do NOT improvise. By using their exact language, they will understand that you really listened to them and are not trying to put words into their mouths.
- Separate thoughts or comments with bullet points.
- Emphasize and format Headings and Section Headings.

REPORT FORMAT:

INITIAL CONSULTATION REPORT

CONTACT INFO:

- CLIENT NAME: [client_name]
- ADDRESS: [client_address]
- PHONE: [client_phone]
- CELL (IF DIFFERENT FROM PHONE): [client_cellphone]
- PREFERRED: [client_preferred_communication]
- EMAIL: [client_email]

SOURCE:
[How did this person hear about us? Past Client? Referral? Social Media? Web? Agent network? The reason we ask is we always want to thank those who referred the client to us.]

INTEREST:
[What are they most interested in accomplishing with buying / selling. Why is that important to them? Did they provide any context for buying or selling that is important to note?]

EXPERIENCE:
[Have they bought and / or sold a home before? Have they done so recently? What real estate experience do they have, and how was it for them? What would they like to change during this process versus the last time?]

TIME FRAME:
[When do they plan to buy / sell? What is important to them around the timeframe (work relocation, school calendar, etc.).]

FINANCIAL CAPACITY:
[What is their financial capacity or situation? If they are buying, do they have money for a down payment? Have they been pre-qualified? What is the payoff for their current home? What do they think their current home is worth? If they are already pre-qualified, who is the loan officer / if they are not, would they like a recommendation?]

DECISION MAKER:
[Who will be involved in the decision-making process? Is it just them, them and a partner/spouse, parents, or anyone else they rely on for making the decision?]

CONCERNS:
[What are their concerns about buying / selling right now? Do they have any concerns about the current marketplace, interest rates, making a financial commitment to a home? Did they express why these concerns are important? Did they give any context for the concern?]

OBJECTIVES:
[What are their ultimate objectives for buying / selling? In other words, if they could share with you the most important outcome that the move would accomplish, what is that? Why is that important to them?]
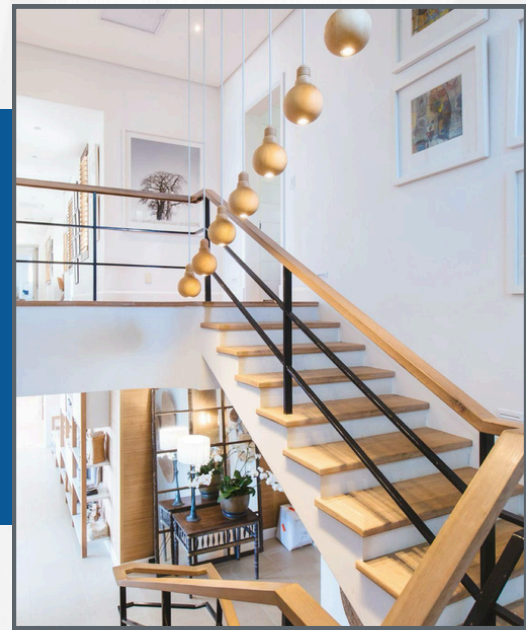
NEXT STEPS:

Explain next steps and set an appointment.

***TRANSCRIPT OF CALL:

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Step 2: Capture Lifestyle & Property Requirements (a focused follow-up)

- Schedule a separate call to go deep on property preferences: neighborhoods, commute, schools, features, must-haves, deal-breakers, lifestyle fit.

- Record the call so you can use the transcript when creating the Personalized Home Buyer Guide. Use the same prompt from the Initial Consultation to extract the call notes.

- Use a structured intake (the "Lifestyle & Property Requirements" template on the next page) so your inputs are consistent and complete.

- Transform your Lifestyle & Property Requirements call recording into a readable report using the Lifestyle & Property Requirements Report Prompt (shown after the Lifestyle & Property Requirements template below).

Warning:

You must comply with laws & regulations when it comes to contacting any consumer.

This includes, but is not limited to, the Do Not Call list and Telephone Consumer Protection Act.

Learn more from the National Association of REALTORS®.

Step 3: Add local market context (RPR/MLS)

- Create a Neighborhood or Market Report (zip/area level) for the area your buyer is interested and export a PDF of the report.

- You will use this neighborhood report when you create the Personalized Home Buyer Client.

- Your MLS or NAR's Realtor Property Resource (RPR) has neighborhood reports.

- Include a copy of the Neighborhood or Market Report with the Personalized Home Buyer Guide Prompt (showing in Step 4).

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TEMPLATE: Lifestyle & Property Requirements

Lifestyle & Property Requirements Questions

NAME: John Seymour Holms

CURRENT SITUATION: Can you share with me a little about your current living situation...specifically: What do you like about where you are now? What would you like to change?

LIFESTYLE FEATURES: I want you to put on your creativity hat for a minute and think about this: ideally, in whatever timeframe you specify, what is your ideal lifestyle? Can you describe what your lifestyle would look like once you've moved into your new place? How would it differ from your situation now?

NEIGHBORHOODS OR AREAS: What different areas in town have you been checking out? What is it about those areas that are appealing and satisfy the lifestyle you wish to live?

KEY LOCATION FEATURES: When it comes to location, what's most important to you? Schools? Proximity to restaurants, recreation & shopping? Access to highways & freeways? Urban, suburban, or rural? Please take a few minutes to consider and share your thoughts with me.

HOME FEATURES: What are you looking for in a home? Feel free to start out pretty generically, as we will dive into the details in a few minutes.

HOMES RECENTLY VIEWED: What about these homes do you like? Is there anything missing from them?

MUST HAVES : What are the "deal breakers" for you? Why are they important? Would there be anything that would make you compromise on them?

NICE TO HAVES: What would you like to have, if you didn't have to compromise on price or location?

DREAM HOUSE: If time, money, and availability weren't an issue, what would like to have in your next home?

MISSING QUESTIONS: What questions do you feel like we missed during this conversation, or what else would you add to this to help me locate the best options for you?

NEXT STEPS: Come into the office for a face-to-face meeting. Wednesday, October 16th, at 4pm. Will send an email confirming appointment.

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PROMPT: Lifestyle & Property Requirements Report

This is a transcript of a phone call between a real estate agent and their prospective client. The real estate agent is doing a Lifestyle & Property Requirements Consultation with prospective clients on buying a home. This consultation is where the real estate agent asks their client questions about what they want in the home they want to purchase and why they want it. Create a report of this call using the format below.

IMPORTANT INSTRUCTIONS:
- Summarize what the client said in response to the agent's questions.
- Include references to the prospective client's exact language.
- Separate thoughts or comments with bullet points.
- Emphasize and format Headings and Section Headings.

REPORT FORMAT:

LIFESTYLE & PROPERTY REQUIREMENTS REPORT

CLIENT NAME: [client_name]

CURRENT SITUATION:

LIFESTYLE FEATURES:

NEIGHBORHOODS OR AREAS:

KEY LOCATION FEATURES:

HOME FEATURES:

HOMES RECENTLY VIEWED:

MUST HAVES:

NICE TO HAVES:

DREAM HOUSE:

MISSING QUESTIONS:

NEXT STEPS:

***TRANSCRIPT OF CALL:

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Step 4: Generate the Personalized Buyer Guide with a Structured Prompt

- Combine the three inputs (Initial Consultation, Lifestyle/Requirements, and market report from RPR/MLS).

- Upload those documents into ChatGPT and use the Personalized Home Buyer Guide Prompt (below) to create the final output.

- If you want to brand the document and make it a PDF, you this prompt after ChatGPT generates the Personalized Home Buyer Guide:

  ```
  Create a professionally branded pdf report
  with my brand colors of [main color],
  [secondary color] and [accent color].
  ```

Step 5: Send the Home Buyer Guide to Your Client.

Send the guide before your in-person buyer consultation or tour. This impresses prospects and raises conversion into signed agreements because it demonstrates initiative and personalization ahead of any commitment.

Email stub you can adapt:

Subject: Your Personalized Home Purchase Plan — Preview Before We Meet

Body:
Hi [First Name] — based on our conversation, I assembled a tailored plan covering neighborhoods, price expectations, a smart touring strategy, and a step-by-step timeline. Take a look; I'll walk you through it during our [date] meeting.

Note:

You will need to follow-up with them multiple times after you've sent the CMA.

Just because they don't get back to you right away, or ghost you on the first few attempts, it doesn't mean they aren't candidates.

The "REVERSE" Expired Listing System

Assemble Your Expired Listing Package. → Deliver Your Package to Expired Listings. → Follow-up with calls, letters & drop-ins.

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PROMPT: Personalized Home Buyer Guide Prompt

You are a precise real estate assistant. Generate a client-ready "Home Purchase Plan & Guide" using the structure below. Keep it fact-driven, clear, and concise.

DATA EXTRACTION REQUIREMENTS
Gather and calculate where necessary the following inputs from the Initial Consultation Document, Lifestyle & Property Requirements Document and Neighborhood Report provided by the user:
- Client name: {{client_name}}
- Target area(s): {{target_areas}} (include ZIPs if known)
- Budget (max): ${{budget_max}}
- Financing: {{down_payment_percent}}% down (${{down_payment_amount}}), loan for balance
- Timeframe: {{timeframe}}
- Property type: {{property_type}}
- Lifestyle priorities: {{lifestyle_priorities}} (e.g., school zones, commute, walkability)
- Experience level: {{experience_level}} (e.g., first-time, owned before)
- Local tax rate est.: {{tax_rate_percent}}%
- Insurance considerations: {{insurance_notes}} (e.g., wind/hail, flood)
- HOA/condo notes: {{hoa_notes}}
- Current rate range to model: {{rate_low}}-{{rate_high}}% APR
- Price-per-sq-ft range (local): ${{ppsf_low}}-${{ppsf_high}}
- Typical closing-cost range: ${{cc_low}}-${{cc_high}}
- Target size range: {{sqft_low}}-{{sqft_high}} sq. ft.
- Bedrooms/baths: {{beds_baths}}
- School zoning targets (if any): {{school_targets}}
- Focus neighborhoods: {{focus_neighborhoods}}
- Touring cadence goal: {{touring_goal}} (e.g., 5-7 homes weekly)
- Market caveats: {{market_notes}} (e.g., low inventory, new builds, septic)
- Agent name and contact footer: {{agent_footer}}

OUTPUT FORMAT
Title: Home Purchase Plan & Guide

Header
- Target Area: {{target_areas}}
- Budget: ${{budget_max}}
- Financing: {{down_payment_percent}}% down (${{down_payment_amount}}), loan for balance
- Timeframe: {{timeframe}}
- Property Type: {{property_type}}
- Lifestyle Priority: {{lifestyle_priorities}}
- Experience: {{experience_level}} (write to a newer buyer unless told otherwise)

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PROMPT: Personalized Home Buyer Guide Prompt (continued)

Phase 1: Preparation (Weeks 1-3)
- Explain pre-approval vs. pre-qualification and why it matters.
- Next steps:
  • Documents: W-2s/tax returns, pay stubs, bank statements.
  • Apply with 2-3 lenders. Compare rate, APR, points, lender fees, credits.

Budget Snapshot
- Purchase Price modeled: ${{budget_max}}
- Down Payment: ${{down_payment_amount}} ({{down_payment_percent}}%)
- Loan Amount: = price - down payment.
- Monthly Payment Estimate: show range using {{rate_low}}-{{rate_high}}% and {{tax_rate_percent}}% effective property tax plus insurance placeholder.
  • Display P&I, est. taxes, est. insurance as separate lines and total.
- Closing Costs: ${{cc_low}}-${{cc_high}}.
- Recommended Safety Net: 3-6 months of expenses post-close.

Phase 2: Home Search (Weeks 2-12)
- Must-Haves vs. Nice-to-Haves:
  • Must: {{beds_baths}}, {{sqft_low}}-{{sqft_high}} sq. ft., {{school_targets}} if applicable.
  • Nice: {{nice_to_haves}}.
- Focus Neighborhoods in {{target_areas}}:
  • List {{focus_neighborhoods}} with one-line notes on age of homes, amenities, commute, and HOA.
- Price Reality Check:
  • Use ${{ppsf_low}}-${{ppsf_high}}/sq. ft. to show example list prices for {{example_sqft_1}} and {{example_sqft_2}} sq. ft.
- Touring Strategy:
  • Preview {{touring_goal}}.
  • Track taxes, HOAs, MUD/PID, and deed restrictions.

Phase 3: Making an Offer (Months 2-4)
- Offer components: price, earnest money (~1% of offer), option period {{option_days}} days with fee ${{option_fee}}, contingencies (financing, appraisal, inspection, HOA docs).
- Negotiation tools:
  • Seller credits for repairs, rate buydown, or closing costs.
  • Flexible closing timeline {{closing_timeline_days}} days or lease-back if needed.

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PROMPT: Personalized Home Buyer Guide Prompt (continued)

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Phase 4: Contract to Close (Months 3-6)
- Inspection: general + specialists as indicated.
- Appraisal: lender-required; actions if low appraisal.
- Insurance: quote early; note {{insurance_notes}}.
- Title and HOA docs: review deadlines and fees.
- Closing Day: wire funds (down + costs), final walk-through, sign, key exchange.

Typical Timeline
- Week 2: Pre-approval complete.
- Week 4: Neighborhoods and must-haves defined.
- Week 6-8: Touring and first offers.
- Week 10-12: Under contract.
- Month 3-6: Inspections, appraisal, financing, closing.

Notes
- Why {{down_payment_percent}}% down helps: avoids PMI and lowers payment.
- Why school zoning matters: supports resale value.
- Why speed matters: be ready to act within 1-2 days on a fit.

Compliance and Localization
- If browsing is allowed, pull 3 recent comps per focus neighborhood to validate $/sq. ft. and cite source names and dates in one line. If not, state ranges are estimates.
- Flag special local items: MUD/PID taxes, short-term rental limits, flood plain, septic vs. sewer, foundation type, wildfire or hail risk, transfer fees.

Deliverables
- A single, formatted document with clear headings and bullets.
- All currency with $ and thousand separators.
- Calculations shown once, then rounded to the nearest $50 for payment ranges.
- Close with {{agent_footer}}.
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