AI TRAINING SERIES / GUIDE 01

SET UP YOUR AI TO WORK LIKE YOU

Personalize ChatGPT.
Find your voice.
Build your AI assistant.



CUSTOMIZE
how AI communicates with you.

TEACH IT
your business, goals, and preferences.

CREATE
content that sounds like you.

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FREE AI TRAINING / GUIDE 01

Set Up Your AI to Work Like You

Three simple exercises to make ChatGPT more useful for your real estate business - and help it communicate in a voice that feels like yours.

01 | Tell AI how to respond to you

Your personal preferences are different from the way you want a client-facing email to sound. Start by defining how the assistant should work with you.

COPY + PASTE PROMPT 01 - YOUR WORKING STYLE

Act as my AI setup coach. Ask me five questions, one at a time, about how I prefer to receive advice, how much detail I want, whether you should challenge my assumptions, my preferred tone, and what I use AI for. After my answers, draft a concise set of instructions for how you should respond to me. Show me the draft and ask what I would change before I save it.

Try these preferences as a starting point

Be clear: Give me the answer first, followed by the reasoning. Be useful: Ask for missing facts instead of guessing. Be candid: Point out weaknesses in my plan. Be organized: Use short steps when teaching me a process.

QUICK NOTES / What should AI do more - or less - often?

_____

_____

_____

KEEP IN MIND
These instructions influence responses; they do not guarantee perfect accuracy or change the underlying AI model. Always verify consequential claims and protect private client information.

Teach AI Who You Are

A useful assistant needs context: who you serve, what you do, and what good work looks like to you.

02 | Build your real estate business profile

COPY + PASTE PROMPT 02 - BUSINESS PROFILE INTERVIEW

Help me create a reusable AI business profile. Interview me one question at a time about: my market and clients, the type of real estate work I do, my goals, common client questions, my communication style, and tasks I want AI to help with. Do not ask for confidential client information. When finished, write a concise profile I can review, edit, and use in future chats or personalization settings. Separate confirmed facts from your suggestions.

03 | Save your preferences

1. Open ChatGPT and go to your account/profile settings.
2. Find the personalization or custom-instructions options available in your version.
3. Review the AI-generated profile. Remove anything inaccurate, overly personal, or temporary.
4. Enter the relevant preferences in the available fields and save.
5. Start a new chat and test the results. If a setting is unavailable, keep your profile as a reusable opening prompt.

CHECK YOUR SETUP

[ ] My business details are accurate. [ ] My preferred response style is clear.
[ ] I removed private client data. [ ] I tested a new conversation.

YOUR BUSINESS SNAPSHOT

Primary audience: _____

Main goal for using AI: _____

One task I want to improve this week: _____

TIP
Personalization menus and feature availability can vary by account and change over time. Use the settings you can see; you do not need a paid plan just to begin practicing with prompts.

Make AI Write Like You

A business profile is the starting point. Your own examples and feedback make the output more recognizable.

04 | Show it your voice

Choose two or three messages you actually wrote - ideally with client details removed. Notice sentence length, warmth, word choice, and how you invite a reply.

COPY + PASTE PROMPT 03 - LEARN MY WRITING STYLE

I am going to share two or three examples of messages I wrote, with names and private details removed. Analyze my tone, sentence length, level of formality, and how I address the reader. Summarize my writing style in five specific rules. Then ask me to confirm or correct those rules. When I give you a new writing task, follow the confirmed rules without copying phrases from my examples.

05 | Test it on a real-world task

COPY + PASTE PROMPT 04 - CLIENT FOLLOW-UP

Using the writing style we agreed on, help me draft a short follow-up to a buyer or seller. First ask who the audience is, what happened in our last conversation, and what useful next step I can offer. Write a friendly, natural message focused on the recipient. Avoid generic sales language and do not invent facts. Give me one version, then ask what sounds unlike me.

A 5-minute practice loop

1. Run Prompt 03 with your writing samples. 2. Correct the style summary.
3. Run Prompt 04. 4. Edit the draft in your own words.
5. Ask AI to update its style rules based on your corrections.

MY VOICE CHECKLIST

[ ] Sounds like something I would say [ ] Focuses on the client
[ ] No invented facts or promises [ ] Clear next step [ ] Reviewed before sending

NOTES / Words or phrases I want AI to avoid

_____

_____

WHAT COMES NEXT?
Use your new assistant to plan your week, practice conversations, and create better follow-ups. Explore the free AI Resource Library on the workshop website for additional copy-ready prompts.