Practical AI Playbook for the Wolfe Team

A post-presentation guide to visibility, content, client service, and a 14-day pilot

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This playbook combines the three discussion pieces into one working guide. It is designed for a team that already understands AI: begin with a few real inputs, test a repeatable workflow, and let agents approve the final work.

The starting point

The supplied materials report **365 sales and $147.8 million in five-year volume**, a **2023 Frederick News-Post Best Residential Real Estate Team** award, and a **Top 1% Frederick County ranking for Ron in Q3 2026**. These are strong proof points to confirm against team or brokerage records before reusing publicly.

An informal October 2026 review of @ronwolfe.realtor described many listing flyers earning roughly **2-4 likes**, versus **8-9 likes** for client celebrations, with video appearing stronger than static images. This is a small observation, not a measured content study. Use account analytics to test whether the pattern holds.

The opportunity

- Make the team's real client experience easier for people to find and understand.
- Use one verified source to make several useful pieces of content.
- Reduce repeat drafting in follow-up and seller preparation.
- Keep facts, permission, judgment, and sending with a person.

How to use this guide

- Pages 2-4: visibility and a content system based on actual team work.
- Pages 5-6: field workflows for buyers, sellers, and title readiness.
- Pages 7-9: review rule, pilot plan, and scorecard. Starter prompts appear beside the workflows.

1 Audit what prospects can find

Buyers and sellers increasingly ask conversational tools direct questions. An AI answer may draw on public pages, reviews, profiles, and other sources. Its results can differ by tool, prompt, location, and date. Treat visibility as something to audit and improve, not as a ranking that can be guaranteed.

Five-question search audit

Run five questions that sound like a real prospect, across more than one AI search tool. Save the answer, cited sources, and date. Look for the team's presence, factual gaps, and inconsistent business details.

- Who can help me sell a home in Frederick, Maryland?
- What should I ask an agent before buying in Urbana?
- Which Frederick-area agents have recent client reviews about relocation?
- What should a first-time seller know before listing in Frederick County?
- What local expertise matters when moving to Frederick from out of state?

Record	What to capture
Question + tool	Exact wording, tool, and date of the test.
Answer + citations	Who appears, what is said, and which pages support it.
Team opportunity	A missing answer, outdated profile, thin local page, or unshared review.
Next edit	One accurate page or profile improvement the team controls.

Publish useful proof where it belongs

Prioritize accurate team bios, clear service areas, client experiences with permission, and local Q&A content. A listing graphic may be useful to followers; a public text page can also explain the team's work to people searching for an answer. Neither format guarantees an AI citation.

First action

- Choose one common seller question and publish a concise answer with a named author, date, and specific Frederick context.
- Review business name, service area, contact details, and agent bios for consistency across the team's own public profiles.

2 One real input, several useful outputs

The content system begins with an approved source: a review, a completed transaction, a verified property fact sheet, or a short agent video. The aim is to express a distinct idea for each channel, not post the same message repeatedly.

One review into four pieces

Select a real review and identify what it actually says about the client's goal, the team's response, and the result. Keep direct quotations exact.

Output	Purpose
Quote graphic caption	Let the client's own words carry the proof.
Short client story	Explain the situation and the team's contribution, using only supported facts.
30-second video script	Give an agent a natural way to explain one lesson.
Four-panel carousel	Walk through a problem, approach, result, and takeaway.

One closing into five stories

With client approval, a closing can yield a celebration, client journey, neighborhood note, lesson learned, and short video script. Each should answer a different question for a future client. Omit private details and any outcome the source does not establish.

Example: a buyer relocating to Frederick

- **Celebration:** acknowledge the move and milestone.
- **Journey:** describe how the buyer narrowed the search, with permission.
- **Neighborhood note:** answer a local question using verified facts.
- **Lesson:** explain one decision that helped the buyer.
- **Video:** have the agent share one practical relocation tip.

A useful content mix includes client proof, practical buyer and seller answers, Frederick stories, short videos, and listings when a property is the news. Compare results by format in the team's analytics before changing the schedule.

3 Let content travel across channels

Frederick-first content

Local knowledge is more valuable when it answers a specific question. Try a neighborhood comparison, an event with verified details, a buyer question, or a story about a local place. Avoid generic descriptions and unsupported claims about schools or who a neighborhood is “for.”

The video multiplier

Record a 60- to 90-second answer to a question clients actually ask. Use AI to find a strong short clip, create accurate captions, draft an email paragraph, and prepare a brief blog recap. The agent checks that each version preserves the original meaning.

The listing copy pipeline

Start from one approved property fact sheet. Draft MLS public remarks, an Instagram caption, a Facebook post, and an email teaser with different lengths and openings. Confirm features, measurements, status, dates, location statements, platform rules, and fair-housing language before publishing.

Verified input	Possible outputs	Human check
Client review	Quote, story, video, carousel	Exact quote and sharing permission
Completed closing	Celebration, journey, local note, lesson, video	Client approval and transaction facts
Agent video	Clip, captions, email, article	Meaning and caption accuracy
Property fact sheet	MLS, social, email	Features, rules, and final approval

Starter prompt - one review

- Using only this approved review, draft a quote graphic caption, short client story, 30-second video script, and four-panel carousel outline. Keep direct quotes exact. Flag any detail needing permission. Do not invent outcomes.

Starter prompt - one closing

- Using only these approved transaction notes, suggest five distinct ideas: celebration, journey, neighborhood note, lesson learned, and 30-second video. Give each one audience takeaway. Mark private or unverified details for removal.

4 Speed up follow-through

The best operational uses of AI preserve the agent's personal knowledge while reducing the time spent turning rough notes into clear communication.

Showing recap from a voice note

After a showing, record about one minute of notes while parked: what the buyer liked, what concerned them, what must be checked, and the next step. AI can draft a short recap with those three categories. The agent edits and sends it. Keep buyer impressions separate from confirmed property facts.

Starter prompt - showing recap

- Turn my notes into a short buyer follow-up. Separate confirmed observations from questions I still need to verify. Use a warm, direct tone and end with one clear next step. Do not invent property facts or send the message.

Personal CRM reactivation

Use verified past context to write an individual check-in. A former search area or previous market question may be a reason to reconnect. Do not presume the contact's plans, invent a prior conversation, or send a bulk sequence disguised as a personal note.

Starter prompt - personal check-in

- Draft a brief note using only this CRM history and this verified reason to reach out. Do not assume the contact is buying or selling now. Ask one easy-to-answer question. Leave out anything that sounds like a bulk campaign.

Measure the whole job, not just AI speed

- For a showing recap, track time from note to agent-approved message and the number of factual fixes.
- For CRM outreach, track meaningful replies and appointments, with the number of contacts as context.
- The draft is only useful if the agent would be comfortable sending it.

5 Arrive ready for the seller conversation

A one-page pre-listing brief

Combine dated public records, MLS history, recent comparable sales, area context, likely seller questions, and a short list of missing facts. Label the source for each claim. Separate public records, MLS entries, and seller-confirmed details. The listing agent chooses comps and pricing strategy.

Brief section	What it should show
Property overview	Address, sourced property facts, prior listing or sale history.
Comparable sales	A few relevant sales with date, price, and meaningful differences.
Seller discussion	Likely questions, preparation ideas, and facts to confirm.
Title readiness	Questions about signers, payoffs, estates, divorce, or recorded issues.

Add the title angle early

A listing conversation is a good time to identify possible settlement questions: who will sign, whether a mortgage needs payoff, and whether an estate, divorce, or lien could require documents or review. AI can organize questions from records provided to it. A title professional must evaluate title, legal authority, and resolution steps.

Starter prompt - pre-listing brief

- Organize these dated property records, MLS facts, and comparable sales into a one-page appointment brief. Label each claim with its source. Separate confirmed facts, seller questions, and title questions. Do not recommend a list price or state that title is clear.

Do not let the brief overstate certainty

- A public record is a source to review, not proof that every property detail is current.
- An AI-organized title question is not a title search or legal conclusion.
- The agent makes the pricing recommendation; the title team reviews settlement issues.

6 Apply one review rule to every draft

The source documents use a five-step rule. It works for public posts, listing copy, buyer follow-up, and internal briefs. The level of review should match the consequence of an error.

Step	Review question
1. Source	Where did each property, market, event, or client claim come from? Is the source dated?
2. Permission	May the team use this name, image, quote, address, or transaction detail?
3. Accuracy	Do numbers, dates, direct quotes, and AI inferences match the record?
4. Voice	Does it sound like the team and suit the audience without steering or exclusionary language?
5. Send	Has the responsible person approved the final post, email, or brief?

Practical boundaries

Use AI to organize and draft. Do not let it invent client outcomes, property features, school assignments, local events, CRM history, or title status. Review listing language for fair-housing concerns. Keep private client and transaction information in approved systems and share only what is needed for the task.

A fast final check

- Read every factual sentence against its source.
- Remove unsupported adjectives and assumptions.
- Confirm client permission and image rights.
- Check the call to action and send it yourself.

The pasted strategic plan proposed specific staff assignments and hard performance targets. Those are useful discussion starters, but the team should select its own owners and targets after seeing current workload and baseline performance.

7 Run a focused 14-day pilot

Choose one workflow first. Reviews into four pieces or one closing into five stories are straightforward pilots because the source material already exists. A showing recap or pre-listing brief may be more valuable if the team's bottleneck is operational.

When	Work	Evidence to keep
Days 1-2	Choose one workflow and owner; gather 3-5 real inputs; record the current manual time.	Source links, permissions, baseline time, success measure.
Days 3-10	Draft, review, edit, and use the workflow on those examples.	Time including review, agent edits, factual corrections, replies or engagement.
Days 11-14	Compare with baseline and decide whether to keep, change, or stop.	Quality notes, time comparison, team feedback, next action.

Name one owner and one reviewer

A practical pilot needs someone to gather inputs and run the drafts, plus someone accountable for final quality. These can be the same person for a small test. The team should choose names together rather than inherit assignments from a draft plan.

Pilot setup card

- **Workflow:** _____ **Owner:** _____
- **Reviewer:** _____ **Start date:** _____
- **Inputs:** _____ **Baseline time:** _____
- **Success measure:** _____

At the decision meeting, use three choices: **adopt** if it saves time and meets the quality standard, **revise** if the idea works but the prompt or review needs adjustment, or **stop** if the cost of correction outweighs the benefit.

8 Score the result and decide

Measure the complete workflow, including human review. The targets in the pasted plan are examples, not standards the team has already accepted. Establish a baseline first.

Measure	Baseline	Pilot result
Time per usable output	_____	_____
Factual fixes per draft	_____	_____
Agent rewrite needed	_____	_____
Relevant replies or engagement	_____	_____
Would the team repeat it?	_____	_____

Questions for the team review

- Which draft saved time after the agent finished checking it?
- What errors or awkward wording appeared more than once?
- Did any output help a client understand something or prompt a useful reply?
- What source, permission, or review step would make this easier next time?

Decision

- Adopt: add the prompt, source checklist, and owner to the team's normal process.
- Revise: change the input, prompt, or review step, then test again.
- Stop: keep the lesson and spend the team's time elsewhere.

Source and claim note

This playbook is adapted from three user-supplied AI discussion documents. The production, award, ranking, team, and social engagement details were supplied in those materials and were not independently rechecked for this handout. The engagement figures describe an informal October 2026 spot check. Verify public claims with the Wolfe Team, brokerage or MLS records, and account analytics before publishing. AI search recommendations and business results cannot be guaranteed.