PARTICIPANT WORKBOOK

Train the Intern.

A full working day on managing AI like your sharpest new hire. Built for the way Strategic Realty actually runs: the listings, the leases, the rent rolls, and the inbox.

Strategic Realty Services
Palm Beach Gardens, Florida

Tuesday, October 20, 2026
9:00 AM to 4:00 PM

Led by AJ Fasano
Operate Bigger

BUILT FOR

Glen Alexander
Chris Fleming
Doug DeSantis
Jim Woods
Kara Gumbiner
Dan Hart
Kate Rohlfsen
Steve Krsulich

This workbook belongs to _____

Write in it. The blanks are the point.

START HERE

Welcome. Today you hire your best employee.

This is not a lecture about technology. It is a working day about management. You already know how to brief a new leasing agent, onboard an admin, and hold a property manager to a standard. By this afternoon you will run an AI the same way, and hand it the work that buries your week.

The morning

The foundation. What AI really is, why it fails, and how to brief it. You build your own standing instructions, live, so your AI knows how Strategic Realty works.

The afternoon

Real brokerage work. You ship one task from your own desk, turn a property file into a Project you can question, and pitch a fictional shopping center owner in pairs.

9:00	**Where you are with AI.** Honest self-rating, no wrong answers.
9:15	**The art of the possible.** A deal package, flyer, and listing reel built in one tap.
9:35	**Meet Andy.** The intern who failed, and whose fault that was. Then Exercise 1.
10:10	**Meet Jessica.** The five layers of briefing an AI so it gets it right.
10:40	**Break**
10:50	**Build your intern.** One interview that teaches it who you are and how you work.
11:25	**Save it and test it.** Load the instructions into your settings so they stick.
12:00	**Lunch**
12:30	**The Proof.** Watch one brief built live, then ship a real task and count the minutes.
1:05	**The toolkit and your property Project.** Which tool for which job, then put a property file to work.
1:35	**The Banyan Crossing pitch.** Four pairs, one owner, one hour to win the assignment.
2:35	**Break**
2:45	**Pitch to the owner.** Each pair presents the work and the conversation behind it.
3:20	**Guardrails and your 30-day plan.** The rules that do not bend, and what happens Monday.
3:50	**Rate again and wrap.**

One promise for the day

You will not leave with homework and good intentions. You will leave with your intern set up, trained on your firm, and already producing work you can use this week.

EXERCISE

Where are you right now?

Rate yourself honestly. Not “have I used it,” but “can I sit down with an AI tool and get it to do good work for me.” We rate again at 3:50.

1	2	3	4	5	6	7	8	9	10

1 = never really touched it · 5 = I use it, but it is hit or miss · 10 = it is a reliable part of my day

Your mic time and your mundane work

Every job has mic time: the part you are actually here to do. Walking a tenant through a space. Negotiating the LOI. Taking care of an owner. And every job buries that mic time under mundane work: the inbox, the rent roll updates, the certificate chasing, the flyer revisions.

MY MIC TIME	MY MUNDANE WORK

IF I HAD ONE PERFECT ASSISTANT TOMORROW, THE FIRST JOB I WOULD HAND THEM

ONE “COOL TO DO” I NEVER GET TO, BUT WISH I DID

Circle one item on your mundane list

Pick the one you would happily hand to a trusted assistant. Minutes it honestly takes me, start to finish: _____. Keep it in mind all morning. At 12:30 you hand it off for real.

> The goal of today is to give you back more mic time.

THE ART OF THE POSSIBLE

The Deal Package Machine

You just watched a commercial deal go in one side and a full marketing package come out the other. Enter the property, the size, the price or asking rent, one standout feature, and a few photos. One tap builds:

The numbers

Cap rate and price per square foot on a sale, annual rent on a lease, computed live from what you entered.

The words

A marketing teaser, the broker email, a LinkedIn post, and the follow-up email, all in the firm's voice.

The visuals

An offering-grade flyer and a cinematic listing reel built from the photos you uploaded.

Here is the part that matters

That tool was built by talking to an AI. No programmer, no agency, no software budget. The point is not the app. The point is that your team can build tools like this for the work you do every day, once you know how to manage the intern doing the building.

Notice the guardrail on the screen

Even the showcase follows the rules you will learn today. It drafts marketing and outreach only. It never invents or inflates financials. Confidential terms stay out of anything public. A broker reviews every number before it goes out.

What would you want a tool like this to do for you?

Think past marketing. Lease abstracts, owner reports, tenant notices, broker opinions of value, due diligence checklists.

THE STORY

Meet Andy.

Twenty-two years at Verizon. Every summer, the call: “You have 17 interns starting Monday.” And every summer, Andy shows up. Shirt never met the dryer. First word out of his mouth: “bruh.”

Andy gets the obligatory welcome, the promise of one lunch, and a single instruction: *“Do a market analysis. Present it at the end of the summer.”* Andy says “yeah, whatever, man” and disappears into a cubicle.

End of summer, Andy’s presentation is garbage. Generic. Off-brand. Pointed in the wrong direction. Barely mentions Verizon.

> **And here is the part that matters: it was my fault.**

Nobody told Andy what the company actually does. Nobody told him how we talk, who our competitors are, what the deck should look like, or what success even means. He got a task with no role, no context, no resources, and no definition of done. Then everyone acted surprised.

Sound familiar?

If you have ever asked AI for a listing description and gotten back something that could describe any building in Florida, or an email to a tenant that sounds nothing like you, you did not have a bad tool. You had Andy. And you managed him like Andy.

Where have you gotten “Andy work” from AI before?

And the honest question: where have you managed a person like Andy?

A new agent handed a listing with no comps. An admin told to “clean up the rent roll” with no format. Most “bad hires” were bad briefs first.

EXERCISE 1 · PAIRS · 25 MINUTES

The First Day at Strategic

Strategic Realty just hired an intern. A real human one. Sharp, motivated, and knows absolutely nothing about commercial real estate or this firm. They start **this morning**, and by Friday they need to produce real work: a flyer, a tenant email, a rent roll update. You get one sit-down before they touch anything.

Your task, as a pair

Write down everything you would tell this intern in that first sit-down. About the firm. About sales, leasing, and management. About how we talk to owners and tenants. About what they must never do. Assume nothing. Aim for at least 12 items.

Debrief: we do this part together

Next to each item, mark the bucket it belongs to:

R role, who they are here **C** context about the firm and the market **S** source material they should use **T** the task itself **O** what a good output looks like **Q** “ask me if you are not sure”

Hold onto this list. You are about to see why it matters more than any technical skill in the building.

THE FRAMEWORK

Meet Jessica: The Five Layers

Jessica is the same tool as Andy. Same program, same summer, same brain. The difference is that Jessica got onboarded like a real hire. The first-day list you just wrote was Jessica's onboarding. Here it is as a system.

1. **Role.** Tell it who to be and what decision it is helping with. "You are a leasing coordinator at a commercial brokerage that manages neighborhood retail centers."
2. **Context.** The property, the owner, the tenant, the market, the constraints. What it would need to know if it walked in the door today.
3. **Resources.** The raw material: the lease, the rent roll, the email thread, the operating statement. Do not make it guess what it could read.
4. **Task.** Exactly what you want, for whom, in what format, and what good looks like. "A four-sentence reply to the tenant. Friendly, firm on the CAM reconciliation date."
5. **Feedback.** One try is not a test. Tell it what to fix and let it revise. You would never fire a good hire over one rough draft.

The hidden sixth layer

Your standing instructions, sometimes called a master and operator prompt. Instead of re-explaining yourself every time, you teach the AI once who you are and how you work, and save it. That turns it from a stranger into an extension of you. You build yours before lunch. And tell it to **ask you questions before it starts**. An AI that asks before drafting is not failing. It is the system working.

The performance equation

Output Quality = Instructions × Context × Resources × Feedback

It multiplies. If any one factor is near zero, the output is near zero, no matter how strong the rest are. Most people run low instructions, no context, no resources, no feedback, and then blame the tool.

> Same person could have been either one. So: who do you want as your intern?

THE MAP

The Five Stages, and the Intern Rules

Everyone starts at the bottom. The goal today is to move you a stage or two, on purpose. Mark where you are today with an X and where you want to be in 30 days with a circle.

1. **Toy.** Random questions, low trust, “let me see what it says.”
2. **Task.** Emails, notes, a quick listing description. Real, but one-off.
3. **Workflow.** Part of how you do a recurring job, like the monthly owner report. This is where the hours come back.
4. **System.** Connected to your inbox, your files, and your lease library, with shared standards across the team.
5. **Digital workforce.** It runs multi-step work, like a tool that builds a whole deal package, and gives you back real hours.

Today moves you into stage 3. The 30-day plan at the back of this book is your road to stage 4.

The intern rules

It never presses send

It drafts. You decide, you sign, you send. That goes double for anything an owner, tenant, or buyer will read.

You check every number

Rents, NOI, cap rates, square footage, dates. Every figure is traced to a source document before it leaves the office.

It supports judgment

It can find the renewal clause. It does not decide what the clause means for your client. That is your license, not its.

One attempt is not a test

Coach it like a person: “closer, but shorter, and lead with the drive-thru.” The redo takes seconds.

LAB · STEP 1 OF 2

Build Your Intern

One interview, one set of standing instructions. It covers **who you are**, which is your role, the firm, and the work, and **how you want it to behave**, which is tone, format, and the rules it never breaks. You do this once. Every conversation after today starts with your intern already trained.

MY ROLE, AND WHAT I ACTUALLY DO IN A WEEK

THE PROPERTIES AND CLIENTS I HANDLE

THE OUTPUTS I NEED MOST

THREE THINGS IT MUST NEVER DO

1. **Open a brand new chat.** A clean start keeps the setup focused.
2. **Paste the interview below,** copied from www.operatebigger.com/strategic so you are not retyping it, and answer the questions using your notes above.
3. **Keep the finished instructions.** Copy them into a note or an email to yourself. You load them into your settings in step 2.

THE SETUP INTERVIEW

You are going to interview me and then write one set of standing instructions that teaches you who I am and how I work, so I never have to explain myself again. Ask one question at a time and wait for my answer. If an answer is vague or missing something you need, ask one follow-up before moving on. Cover these in order: 1. My name, my role, and what I actually do in a week. 2. The firm, what it does, who it serves, and the property types and clients I handle. 3. The work I want help with most, and the outputs I need. 4. Who reads my work and how formal each one should be. 5. The tone I want, and the words or habits I cannot stand. 6. How I want information structured: length, bullets or prose, tables for numbers. 7. How to handle numbers, dates, and lease language, including what to do when you are not certain. 8. When to ask me questions before drafting, and when to just produce. 9. Three things you must never do. 10. Anything confidential that must never appear in your output. When the interview is finished, write the final standing instructions addressed to you, in 1,500 characters or less, covering all ten. Then add one short line listing anything you were unsure about.

WHILE YOU ARE ANSWERING

Answer It Like a Manager

The interview is only as good as your answers. Talk to it the way you would brief a sharp new hire on day one. Specifics beat polish, and nobody is grading your grammar.

If you are a broker

"I handle retail and office sales and leasing in north Palm Beach County. Owners and tenant reps read most of what I write. Keep emails under six sentences, never oversell a property, and never put a number in writing that I did not give you."

If you manage property

"I manage six centers. My week is tenant requests, vendors, certificates of insurance, and owner reporting. Be warm with tenants and precise with owners. Put numbers in a table and tell me where each one came from."

If you run the office

"I keep the files, the forms, and the calendar straight for the whole office. I need templates, clean summaries, and consistent formats. Ask me before you invent a format, and never use a tenant's full account details."

Four answers worth getting right

- **Who reads your work.** An owner, a tenant, and a buyer each get a different register. Say so, and it stops guessing.
- **Numbers and dates.** Tell it that figures come from documents you provide, that it shows where each came from, and that it says so when it is not certain.
- **When to ask first.** Anything a client will read gets questions before a draft. Internal notes can go straight to a draft.
- **The three nevers.** Be concrete. No invented figures, no legal interpretation, and nothing confidential in a public tool.

Why 1,500 characters

The interview ends by writing your instructions in 1,500 characters or less. That is not arbitrary. Settings fields are small, and a long instruction set gets diluted. If yours comes back longer, tell it to cut to 1,500 without losing the nevers.

THE ONE RULE I WANT IT TO FOLLOW ABOVE ALL OTHERS

LAB · STEP 2 OF 2

Make It Permanent

Right now your instructions live in a note. This step loads them into your AI's settings, so every future conversation starts with your intern already trained. No more re-introducing yourself every morning.

Copy your instructions

Take the block the interview produced, the one at 1,500 characters or less, and have it on your clipboard before you open settings. If you want to change something later, edit the text in your note and paste the whole block again.

Claude

Open **Settings** from your initials in the corner. Find the field that asks what Claude should know about you, paste your instructions, and save.

ChatGPT

Open **Settings**, then **Personalization**, then **Custom Instructions**. Paste your instructions into the field for how ChatGPT should respond, and save.

Copilot

Where your prompt lives depends on your Microsoft 365 plan. We set it up together in the room so it lands in the right place.

The test

Open a fresh chat and type: *"Based on what you know about me, what are five things you could take off my plate this week?"* If the answer sounds like it actually knows your desk at Strategic, you just turned Andy into Jessica.

☐ **Checkpoint:** my instructions are saved in my AI's settings and the test worked.

The five things it said it could take off my plate

THE PROOF · 35 MINUTES

See One, Ship One

Your intern is trained. Time to put it to work on the task you circled on page 3, and to check the math on the morning's promise: work that eats hours, done in minutes.

First, we build one together

Watch the front of the room. AJ briefs a trained intern live on a real Strategic task, and the room supplies the layers: the context, the audience, the output. When it asks questions back, notice that. It is not stalling. It is the setup working.

Now your turn

1. **Brief it fully.** Fresh chat. All five layers. Paste the real facts it needs, but strip anything confidential first (see page 22). Close with: *"Ask me questions before you draft if anything is unclear."*
2. **Answer its questions** the way you would answer a sharp new hire.
3. **Coach one revision.** Like a manager: shorter, warmer, lead with the rent, fix the subject line.
4. **Ship it.** Review it, fix the last 10 percent by hand, and send or save it today. That last 10 percent is your job, and it stays your job.

What it normally takes me

minutes

What it took with the intern

minutes

Minutes back, and what made the brief work

Call your minutes out when asked. The room total goes on the board.

> If it saved you twenty minutes on one task, that is your week transformed once you have ten of these.

REFERENCE

The Toolkit: Which Intern for Which Job

Claude and ChatGPT are iPhone and Android: same phone call, different feel. Pick one main tool, train it well, and do not chase every shiny new release. Here is the map for a brokerage.

ChatGPT	**Your writing and thinking intern.** Fast first drafts: listing descriptions, tenant emails, LinkedIn posts, talking points for a pitch. Reach for it when you can describe the tone and outcome up front.
Claude	**Your careful writer and document intern.** Strong with long documents and multi-step work: comparing two lease drafts, turning an operating statement into an owner summary, building a checklist from a purchase agreement.
NotebookLM	**A free second opinion on a document set.** From Google. It answers only from files you load and cites the page, and it can turn a property file into a written brief or a short audio rundown. Worth knowing, but your Project does the daily work.
Copilot	**Your Microsoft 365 intern.** If the firm lives in Outlook, Word, and Excel, it is already sitting next to your inbox and files. Good for summarizing long threads and drafting replies where you already work.

The $20 rule

On whichever main tool you choose, the paid tier is not about speed. It buys your intern **memory** and room to work, and on most plans it gives you more control over how your data is used. An intern with no memory has to be re-introduced to you every Thursday. Pay the $20.

What about Projects?

Claude and ChatGPT both have Projects: folders where a set of instructions and files live together for one lane of work. Think departments. Your saved instructions are the company handbook every intern knows. A Project is the leasing desk or the Banyan Crossing file, with its own instructions and documents attached. Graduate a lane of work into a Project when you touch it every week.

THE ONE TOOL I AM COMMITTING TO AS MY MAIN INTERN

LAB · YOUR PROPERTY PROJECT

Make a Project Out of a Property

Searching a lease, a contract, or a folder of old files for one clause is some of the most expensive reading in the office. A Project fixes that. You give your AI a set of documents and a standing instruction once, and every question you ask after that is answered from those files, in the tool you already pay for.

1. **Create a Project.** In Claude or ChatGPT, open Projects and start a new one. Name it for the property, not the date. Banyan Crossing, not October file.
2. **Upload the file.** Today we use the Banyan Crossing property file, a fictional set you can download at www.operatebigger.com/strategic. Back at your desk, upload only what your firm's policy allows.
3. **Set the standing instruction** in the Project so it applies to every question: *"Answer only from the uploaded documents. Quote the exact language and name the document and section. If the documents do not answer it, say so instead of guessing."*
4. **Ask, then verify.** Open the document it quoted and read the clause yourself. Trust the page, not the summary.

Questions worth asking a lease, and the same trick on any file

"When does this lease expire, and is there a renewal option? What is the notice window, in calendar dates?"

"Does this tenant have an exclusive use? Quote the clause and tell me which uses it blocks."

"What are the insurance requirements, and who must be named as additional insured?"

"Is there a cap on CAM increases? Show me the exact wording."

It finds. You interpret.
Your Project can find the clause in seconds. What the clause means for your client is still a judgment call for a licensed professional, and sometimes for an attorney. Treat every answer as a pointer to the page, never as the final word.

The same move on the rest of your files

A Project does not have to be one property. Make one for vendor contracts, one for the forms your office reuses, one for a deal in due diligence. A Project per lane of work beats one giant folder, because the instruction and the files stay matched to the job.

THE FIRST PROJECT I WILL BUILD BACK AT THE OFFICE, AND THE FILES GOING IN IT

THE TEAM CHALLENGE · PAIRS · 60 MINUTE BUILD

The Banyan Crossing Pitch

A shopping center owner is interviewing brokerages on Friday. He manages the property himself, badly, and he cannot decide whether to lease it up and hold, or sell. Strategic Realty gets one hour to put together the package that wins the assignment. You will pitch it to the owner at 2:45. AJ plays the owner.

EVERYTHING IN PAGES 16 THROUGH 19 IS FICTIONAL. INVENTED PROPERTY, OWNER, AND TENANTS.

Four pairs, four pieces of one pitch

Pair 1 · Lease-Up

Fill the two vacancies. Marketing for the end-cap, outreach to tenant reps, and a target tenant list that respects the exclusives.

Pair 2 · Value and Sale

What the center is actually worth, a buyer teaser, and a straight reply to the owner about his numbers.

Pair 3 · Management

A 90-day takeover plan, a lease abstract, and the insurance cleanup, worked inside a property Project.

Pair 4 · The Office

The systems behind the work: tenant notices, the internal handoff to the brokers, and a filing scheme anyone can search.

Rules of engagement

- **Only the facts in the file.** If a number is not on pages 16 through 19, your AI does not get to invent it, and neither do you.
- **The file is not perfect.** Owners exaggerate and records drift. At least one thing in this file is wrong. Your AI will not catch it unless you make it check.
- **Make it ask first.** Have your AI ask clarifying questions before it drafts, and answer them as a pair.
- **Iterate at least twice.** A first draft is a starting point, not a deliverable.
- **Read the other pairs' missions.** What one pair finds can sink another pair's work.

The pitch: 8 minutes per pair

1. Show the owner the deliverable 2. Show the room your best prompt and your best correction 3. One thing AI got wrong, and how you caught it 4. Would you send this to a real owner today? What would it still need?

SOURCE 1 · PROPERTY FACT SHEET

Banyan Crossing

FICTIONAL PROPERTY FOR TRAINING USE ONLY

Item	Detail
Property type	Neighborhood retail center, grocery anchored, north Palm Beach County
Gross leasable area	36,000 SF across 9 suites
Built / renovated	1998 / facade and parking lot renovated 2019
Parking	212 spaces
Traffic count	About 38,000 vehicles per day on the main road, per the owner's 2024 flyer (source not verified)
Lease structure	All leases NNN. Estimated 2026 CAM, taxes, and insurance: $9.25 per SF
Occupancy	7 of 9 suites leased
Vacancies	Suite 102: 2,400 SF inline, asking $30.00 per SF NNN Suite 106: 3,800 SF end-cap, former bank branch with a working drive-thru lane, asking $38.00 per SF NNN
2025 net operating income	$641,300, per the owner's 2025 operating statement
Owner's asking price	$11,500,000, if he decides to sell
Current management	Self-managed by the owner since his last manager left in June 2026

The owner

Walter Price, Managing Member, Mariner Coast Holdings, LLC. Bought the center in 2014. Proud of it, impatient, and convinced it is worth more than the last broker told him. Hates surprises. Responds well to straight numbers and a clear plan. Has not decided between holding and selling, and wants to hear both.

Known issues the owner mentioned on the phone

- The end-cap has sat empty since the bank left in early 2026.
- His last manager "never chased insurance certificates."
- He thinks "the dentist's lease is up sometime soon" but is not sure when.

SOURCE 2 · RENT ROLL AND INSURANCE LOG

Rent Roll as of October 1, 2026

FICTIONAL TENANTS FOR TRAINING USE ONLY

Suite	Tenant	SF	Rent / SF	Annual base rent	Expires
100	Fresh Harbor Market (anchor)	14,000	$18.00	$252,000	03/31/2031
101	Coastline Dental	2,400	$32.00	$76,800	06/30/2027
102	*Vacant*	*2,400*	*asking $30.00*	*none*	
103	Palm Nail Studio	1,600	$30.00	$48,000	12/31/2026
104	Tidewater Title Co.	3,000	$28.00	$84,000	09/30/2028
105	Gardens Fitness Studio	4,200	$24.00	$100,800	01/31/2029
106	*Vacant (end-cap, drive-thru)*	*3,800*	*asking $38.00*	*none*	
107	Sunrise Bagel Co.	1,800	$34.00	$61,200	10/31/2027
108	Blue Heron Pet Supply	2,800	$26.00	$72,800	05/31/2030
Totals		**36,000**		**$695,600**	

Exclusive uses on file: Suite 100, grocery; Suite 101, dental (see Source 4); Suite 107, bagels and coffee as a primary use.

Certificate of insurance log

Kept by the previous manager. Not updated since June 2026.

Suite	Tenant	Policy expires	Additional insured on file
100	Fresh Harbor Market	03/31/2027	Landlord and manager
101	Coastline Dental	06/30/2027	Landlord only
103	Palm Nail Studio	08/31/2026	Landlord and manager
104	Tidewater Title Co.	01/15/2027	Landlord and manager
105	Gardens Fitness Studio	11/30/2026	No endorsement on file
107	Sunrise Bagel Co.	10/31/2026	Landlord and manager
108	Blue Heron Pet Supply	05/31/2027	Landlord and manager

SOURCE 3 · THE OWNER'S EMAIL

What Walter Sent Over

FICTIONAL EMAIL FOR TRAINING USE ONLY

From: Walter Price, Mariner Coast Holdings
Subject: Banyan Crossing, for Friday

Glen and team,

Thanks for making time Friday. Quick background so you are not walking in cold. Banyan Crossing is basically full, the tenants are solid, and NOI is right around $760,000 this year. At $11.5 million that is better than a 6.5 cap, which is a bargain for a grocery-anchored center up here, so I do not want to hear anybody tell me it is worth less.

That said, I have not made up my mind. If you can show me how to lease the last spaces and run it properly, I might hold it another five years. My last manager was useless on the paperwork side. Never chased the insurance certificates, never told me when anything was coming up. I think the dentist's lease comes up for renewal soon but I honestly do not know when.

The bank space on the end is the one that keeps me up at night. It has had a drive-thru since the day it was built and nobody has figured out what to do with it.

Bring me something I can actually use. If it is good, you have the listing, the management, or both.

Walter

Before your pair uses this email, check it against the file

Compare what Walter claims with Sources 1, 2, and 4. Write down anything that does not match.

Why this page is here

An AI told to "use the owner's numbers" will happily build a beautiful, confident teaser on top of a figure that cannot be true. The skill today is not getting AI to write. It is getting AI to check.

SOURCE 4 · LEASE EXCERPT

Suite 101 · Coastline Dental

FICTIONAL LEASE LANGUAGE FOR TRAINING USE ONLY

Lease between Mariner Coast Holdings, LLC (Landlord) and Coastline Dental, PLLC (Tenant) · Selected sections

Section 3. Term. The Term commences July 1, 2020 and expires June 30, 2027, unless extended under Section 4.

Section 4. Option to Extend. Tenant has two options to extend the Term, each for five years. To exercise an option, Tenant must deliver written notice to Landlord not less than 180 days and not more than 365 days before the expiration of the then-current Term. Rent during each option period shall be the greater of the rent in effect at expiration or 95 percent of fair market rent.

Section 5. Base Rent. Base Rent increases by 3 percent each July 1. Base Rent effective July 1, 2026 is $32.00 per rentable square foot per year.

Section 9. Operating Expenses. Tenant pays its pro rata share of taxes, insurance, and common area maintenance. Increases in controllable common area maintenance charges shall not exceed 5 percent per year, on a non-cumulative basis.

Section 14. Insurance. Tenant shall maintain commercial general liability insurance of not less than $1,000,000 per occurrence and $2,000,000 aggregate, naming Landlord and Landlord's property manager as additional insureds, and shall deliver a current certificate before each policy renewal.

Section 21. Exclusive Use. During the Term, Landlord shall not lease any other space in the Shopping Center for use as a general dentistry, orthodontic, or oral surgery practice.

Section 23. Assignment. Tenant may not assign this Lease or sublet the Premises without Landlord's prior written consent, not to be unreasonably withheld.

This excerpt, the fact sheet, the rent roll, and the owner's email are also in the Banyan Crossing property file at www.operatebigger.com/strategic, ready to upload into your Project.

Read it like a Checker

Before you ask any AI, answer these yourself. Then see if your AI gets the same answers.

LAST DAY TO EXERCISE THE OPTION	USES THE EXCLUSIVE BLOCKS	WHO MUST BE ADDITIONAL INSURED

THE TEAM CHALLENGE · YOUR MISSION

Four Missions, One Owner

Pair 1 · Lease-Up

CHATGPT OR CLAUDE

Deliver: flyer copy for the Suite 106 end-cap, a short email to tenant rep brokers, a LinkedIn post, and a list of eight target tenant categories for Suites 102 and 106 that respects every exclusive in the center. Stretch: which category would you chase first, and why?

> You are a retail leasing broker at a commercial brokerage in north Palm Beach County. I will give you a property fact sheet, a rent roll with the exclusive uses on file, and a lease excerpt. Using only those facts, draft flyer copy for the 3,800 SF end-cap with a drive-thru, a tenant rep outreach email, and a LinkedIn post. Then list eight tenant categories that would fit Suites 102 and 106 without violating any exclusive. Ask me questions before you draft.

Pair 2 · Value and Sale

CLAUDE OR CHATGPT

Deliver: the cap rate and price per SF at the owner's asking price, using the file; a one-page buyer teaser; and a reply to Walter that tells him the truth about his numbers without losing the assignment. Stretch: what does the center look like once both vacancies lease?

> You are an investment sales broker. I will give you a fact sheet, a rent roll, and an email from the owner. Before you write anything, check the owner's claims against the rent roll and the operating statement figure, show your math, and list every discrepancy. Then draft a one-page teaser using only verified numbers, and a reply to the owner that is direct, respectful, and keeps him on our side. Ask me questions before you draft.

Pair 3 · Management

YOUR PROPERTY PROJECT

Deliver: a lease abstract for Suite 101, a 90-day management takeover plan with dates, and certificate of insurance request emails for every tenant that needs one. Stretch: a monthly owner update Walter would actually read.

> Create a Project named Banyan Crossing and upload the property file. Standing instruction: answer only from these documents, quote the language, name the section. Then ask: "Abstract the Suite 101 lease: term, option dates as calendar dates, rent, CAM cap, insurance requirements, exclusive use, assignment. Then compare every tenant's insurance record to what the lease requires and list what is expired, expiring within 60 days of October 20, 2026, or missing." Draft the plan and the emails in the same Project.

Pair 4 · The Office

ANY TOOL

Deliver: a tenant notice the manager can reuse for any property, the internal handoff note that tells the brokers what they inherited, and a file naming and folder scheme for the Banyan Crossing file that anyone in the office could search. Stretch: the one-page office rule for what AI may and may not touch.

> You are the operations lead at a commercial brokerage taking over management of a shopping center. Using the attached file, draft: a reusable tenant notice template with bracketed fields, an internal handoff summary for the brokers covering what matters in the next 90 days, and a file naming convention plus folder structure for leases, insurance certificates, rent rolls, and owner reports, with an example filename for each. Ask me questions before you draft.

Roles inside each pair: one Driver on the keyboard, one Checker who traces every number and date back to the file. Switch halfway.

THE TEAM CHALLENGE · WORKSPACE

Build Notes and Pitch Prep

Our pair

Mission: 1 Lease-Up 2 Value and Sale 3 Management 4 The Office

What we caught that was wrong

OUR BEST PROMPT, WORD FOR WORD

OUR BEST CORRECTION: WHAT WE TOLD IT TO FIX

NUMBERS WE USED, AND THE PAGE EACH CAME FROM

WHAT THE OTHER PAIRS FOUND THAT CHANGES OUR WORK

Would we send this to a real owner today?

Circle one: Yes as is · Yes with edits · Not yet. What would it still need?

NOTES FROM THE OTHER PITCHES

NON-NEGOTIABLES

Guardrails for a Brokerage

Your business runs on trust with owners, tenants, and buyers, and on numbers that hold up in due diligence. These rules keep both intact. They are not suggestions.

Confidential stays out

Owner operating statements, tenant financials, LOI and deal terms, and anything under a confidentiality agreement do not go into a free or personal AI account. Strip names and numbers, or use only a tool the firm has approved for client data.

Every number is traced

Rent, NOI, cap rate, square footage, and dates come from a source document, and a broker verifies each one before it goes to a client. If AI produces a figure you did not give it, delete it.

It finds, you interpret

AI can locate a clause and summarize it. It does not give legal advice or decide what a lease means for your client. When the stakes are real, a professional reads the original.

It drafts, you send

AI never presses send and never makes the final call. A named person at Strategic reviews and owns anything that leaves the office.

Your license is on the ad

Marketing that AI drafts is still your advertising. The firm's required disclosures and your own review apply exactly as they would if you wrote it by hand.

Firm policy wins

If Strategic approves specific tools or restricts others, that outranks anything in this workbook, and it can change as the tools change.

The one-line version

It does not decide, it does not press send, and nothing sensitive goes in. Everything else, go build.

> The intern does the reading and the drafting. Judgment, relationships, and your signature stay with you.

Sales, Leasing, and Marketing

Nothing to fill in. Each prompt names the exact information it needs, asks you for it in order, then asks a follow-up or two before it drafts. Paste it as written, and strip anything confidential before it goes in. Digital copies live at www.operatebigger.com/strategic.

Listing flyer copy. You are a marketing coordinator at a commercial brokerage. Ask me for these, in order: property name and address; size in square feet; asset type; asking price or asking rent; lease structure; the one feature to lead with; who the flyer is for. Then ask up to two follow-ups if anything is missing or unclear. Then write a headline, three benefit lines, and a two-sentence description, using only what I gave you.

Tenant rep outreach. You are a retail leasing broker. Ask me for these, in order: property; suite; size; asking rent; lease type; available date; one or two true selling points such as traffic count or co-tenancy; the action I want. Then ask up to two follow-ups. Then draft four sentences with one clear ask and a subject line under eight words. Add no facts I did not give you.

Offering teaser. You are an investment sales broker. Ask me for these, in order: property and asset type; total square feet; the rent roll, pasted; net operating income and the source; asking price; occupancy; anything a buyer should know. Then ask up to two follow-ups. Show your math for cap rate and price per square foot, list any figure you could not verify, then write the one-page teaser.

LinkedIn post. Ask me for these, in order: what happened, being a new listing, a signed lease, or a closed sale; the property; the one detail worth leading with; anything confidential to leave out; whether to name the other party. Then ask up to two follow-ups. Write under 90 words, professional and specific, no hype words, ending with one line inviting inquiries.

Tour follow-up. Ask me for these, in order: who I toured; the property and suite; what they asked about; the terms we discussed; any concern they raised; the next step and date I want. Then ask up to two follow-ups. Then write the email: answer their questions from my answers, restate the terms, propose the next step with the date.

Pitch prep. Ask me for these, in order: the owner or client; the property; what they say they want; the facts and figures I have; my goal for the meeting; the history between us. Then ask up to two follow-ups. Then give me the five questions they are most likely to ask, a straight answer to each, and the one concern I should raise before they do.

Opinion of value cover letter. Ask me for these, in order: property; owner; the value range; the figures and comparables behind it; the method I used; anything I could not verify. Then ask up to two follow-ups. Then write two short paragraphs on method and what drove the range, state the range, and close with what would move the number up.

Lease comparison. Ask me for these, in order: the first lease or draft, pasted; the second, pasted; the property and suite; which side I represent. Then ask up to two follow-ups. Then list every difference in rent, term, options, CAM, insurance, exclusives, and assignment in a table with section numbers, and flag what changes the landlord's risk. Point me to the language, do not interpret it.

Due diligence checklist. Ask me for these, in order: the effective date; the dates and deadline language from the agreement, pasted; the closing date; who is responsible for each item. Then ask up to two follow-ups. Then build a table of every deadline as a calendar date, in order, with the section number and the owner of each task.

Property Management and the Office

Built from what your team told us eats the week: the inbox, the lease search, the rent roll, the tenant records, and the certificates of insurance. Same rule, paste it and answer the questions it asks.

Tenant email reply. You are a property manager at a commercial brokerage. Ask me for these, in order: the thread, pasted with names removed; the property and suite; what I want the outcome to be; any deadline or lease provision that applies. Then ask up to two follow-ups. Then draft a reply under six sentences that answers the question, states the next step and date, and stays friendly and firm.

Inbox triage. Ask me for these, in order: the subjects and first lines, pasted; today's date; my top two priorities today; anything I can delegate and to whom. Then ask up to two follow-ups. Then sort them into needs me today, can wait this week, delegate, and no action, and draft a one-line reply for the first group.

Certificate of insurance request. Ask me for these, in order: tenant and contact; property and suite; whether the policy expired or is expiring, and the date; the limits the lease requires; who must be named as additional insured; the date I need it back. Then ask up to two follow-ups. Then write two short paragraphs requesting the updated certificate.

Insurance log check. Ask me for these, in order: the certificate log, pasted; the insurance requirements from the leases; the date to treat as today; the window to flag, such as 60 days. Then ask up to two follow-ups. Then list every tenant whose certificate is expired, expiring inside the window, or missing a required additional insured, one row per tenant.

Rent roll update summary. Ask me for these, in order: last month's rent roll, pasted; this month's changes; the property; the effective date. Then ask up to two follow-ups. Then produce the updated rent roll as a table, list every change in plain sentences so I can check each against the source, and flag anything that does not reconcile.

Monthly owner update. Ask me for these, in order: property and owner; the month; occupancy and any leasing activity; collections; maintenance completed and open; anything coming due in the next 90 days. Then ask up to two follow-ups. Then write one page in plain language with the numbers in a small table.

Internal handoff. Ask me for these, in order: my notes, pasted; the property; who needs to act; what I already committed to; the due date. Then ask up to two follow-ups. Then write a short internal update in bullets, under 120 words: what happened, what I committed to, what is needed from someone else, and when it is due.

Vendor work order. Ask me for these, in order: vendor and contact; property and suite; the issue; access instructions; the tenant contact; the response time our agreement requires; any cost limit. Then ask up to two follow-ups. Then draft the email and ask the vendor to confirm scheduling in writing.

Filing scheme. Ask me for these, in order: the document types we keep; how many properties we manage; where files live today; who needs to find them; anything we name a certain way already. Then ask up to two follow-ups. Then propose a folder structure and naming convention, one example filename per document type, and a one-line rule the office can follow.

Better templates. Ask me for these, in order: the form or letter, pasted; who receives it; how often we send it; what changes every time; what must never change. Then ask up to two follow-ups. Then rewrite it as a clean template with bracketed fields, tighter wording, and a short note on when to use it.

BEYOND TODAY

What Is Possible Next

Some of what your team asked for is bigger than a chat window. It is real, it is doable, and it is the natural next step once today's foundation is set. Here is the honest map.

Ready today, as an assistant

Drafting tenant and owner email. Flyer copy, teasers, and LinkedIn posts. Searching a lease for a clause. Checking a certificate log. Turning notes into a monthly owner update. Cleaning up the forms and letters you send every week. You practiced all of these today.

Phase two, with connections built

A searchable lease library across the whole portfolio. A certificate tracker that flags expirations before they lapse. Rent roll changes that flow into owner reports without retyping. Inbox triage wired into Outlook. A Strategic version of the Deal Package Machine, built on your templates and your brand. These need systems connected, not just a good prompt, and they are exactly what a follow-on build handles.

The rule of thumb

If it is drafting, summarizing, finding, or explaining, you can do it now. If it needs to reach into a system and move data on its own, that is a build. Today makes you fluent enough to know the difference, and to lead that build.

What your team asked for before today

Help organizing and answering email. Searching leases for the language that matters. Faster rent roll and tenant record updates. Consolidating tenant insurance. Better templates for the forms we send. Marketing brochures. A second set of eyes on leases and sales contracts. Every one of those is on one of the two lists above.

The one thing I most want built for my desk

CLOSING EXERCISE

Your 30-Day Operating Plan

Every room this training has run in feels the same thing by 4:00: a little drunk on AI. Monday morning the hangover hits. If you do not start this week, next week you are back to doing it all by hand. So we commit now, on paper.

Week 1: one task, every day

Use your saved instructions on one real task a day. The first one:

_____

Week 2: one workflow

Run one recurring job entirely through your intern for the week: owner updates, tenant replies, certificate requests, listing copy.

_____

Week 3: one Project

Build one Project for a property or a lane of work, load the approved files, and write the first question you will ask it:

_____

Week 4: measure and share

Hours I estimate this saves me per week: _____. The best prompt I will share with the team:

_____

My accountability partner in this room

_____

Rate yourself again: 1 to 10

_____

Compare it to page 3.

TAKE IT WITH YOU

Resources and Notes

www.operatebigger.com/strategic
Everything from today, digital and copy-paste ready: the setup interview, the full prompt library, the Banyan Crossing property file, and a digital copy of this workbook.

SCAN OR TYPE

The briefing checklist, one last time

Role	Context	Resources	Task	Feedback	Questions
You are acting as...	The property, the client, the situation	The documents, and only those	The job and the audience	Coach it once. One try is not a test	Ask before drafting

Keep in touch

Questions after today, wins worth sharing, or a workflow you want help building:

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Notes

NOTES

What I want to try first.

The ideas that came up today that are worth a real attempt. Write them while they are still fresh, because Monday morning they will not be.

NOTES

Prompts worth keeping.

A prompt that worked, a correction that fixed it, or a phrase you want to reuse. This page is the start of your own library.

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