ABIDE ACADEMY OF REAL ESTATE

# THE

# AI ADMIN PLAYBOOK

Build a back office that sorts, prepares, drafts, and reminds—while you keep the judgment, approval, and final send.

**BUILT FOR GEORGIA REAL ESTATE PROFESSIONALS**

A practical workbook for reducing administrative drag without surrendering responsibility, confidentiality, or broker oversight.

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BEFORE WE BEGIN

# A MESSAGE FROM DEB

*The goal is not to hand your business over to AI. The goal is to stop allowing repetitive work to consume the time your clients and business need from you.*

Real estate professionals often spend their best hours reacting—email, scheduling, signatures, follow-up, meeting notes, and another message that suddenly feels urgent. AI can help organize that pressure, but only when the workflow has clear boundaries.

In this playbook, AI reads, sorts, summarizes, and drafts. You verify, decide, approve, and send. That line matters—especially when the work touches a consumer, a contract, a deadline, trust funds, agency, advertising, or brokerage policy.

> **DEB'S RULE**
>
> AI may prepare the work. It does not assume my license, judgment, authority, or responsibility.

## What you will build

- A secure administrative home base
- A repeatable inbox-triage workflow
- A practical morning briefing
- Meeting preparation and follow-up systems
- A weekly accountability review
- Client communication templates with Georgia guardrails

READ THIS FIRST

# AI DRAFTS. YOU APPROVE AND SEND.

Nothing consequential should leave your business accounts automatically. The final review belongs to you or to the authorized person designated by your brokerage or organization.

| SECTION | PURPOSE |
|---|---|
| READ | Gather authorized information from connected sources or approved files. |
| SORT | Group work by urgency, client need, deadline, risk, and ownership. |
| DRAFT | Prepare summaries, checklists, and proposed messages. |
| FLAG | Identify missing facts, possible deadlines, legal/compliance issues, and matters requiring personal handling. |
| STOP | Wait for human review before sending, publishing, altering records, or committing anyone to an action. |

**TWO-SECOND PRIVACY CHECK**

Before using a connector or uploading a file, ask: Do I have authority? Is this necessary? Can I remove personal or confidential information? Does brokerage policy allow this?

PART 1

# BUILD YOUR ADMIN HEADQUARTERS

Keep administrative workflows inside one clearly named project or workspace with only the knowledge and connections needed for the job.

**SUGGESTED NAME**

Deb's Administrative & Operations Headquarters

## Add only approved resources

| | |
|---|---|
| ☐ | AI Business Brain and communication preferences |
| ☐ | Current 90-day priorities and weekly scorecard |
| ☐ | Approved brokerage or school procedures |
| ☐ | Standard operating checklists and templates |
| ☐ | Calendar and task-management rules |
| ☐ | Current contact and escalation list |

## Keep out unless specifically authorized

- Passwords, banking credentials, access codes, or Social Security numbers
- Unnecessary financial, medical, immigration, or protected personal information
- Trust-account instructions that have not been approved by the broker
- Private documents belonging to another person or organization

PART 1 • SETUP

# CONNECT CAREFULLY—THEN TEST

If your AI platform can connect to email, calendar, or cloud storage, begin with the minimum access necessary. Features and permissions vary by platform, account, and organization.

1. Confirm brokerage and organizational policy before connecting a business account.
2. Connect the correct professional account—not a personal account by accident.
3. Review requested permissions and remove any that are not necessary.
4. Run a limited test that asks only for counts, dates, or subject lines.
5. Confirm the tool cannot send, delete, move, or modify items without approval.
6. Document how to disconnect access and review it periodically.

**SAFE TEST PROMPT**

Tell me what is on my calendar tomorrow and how many unread messages arrived during the last three business days. Give only counts, times, senders, and subject lines. Do not draft, send, move, delete, or change anything.

RECIPE 1

# THE INBOX TRIAGE

Use after time away or when the inbox becomes a wall. The purpose is to reveal what deserves attention—not to let AI decide what is legally or professionally important.

**PASTE-READY PROMPT**

Review my unread business emails from the last seven days. Sort them into: URGENT TODAY, NEW OPPORTUNITIES, TRANSACTION LOGISTICS, EDUCATION/BROKERAGE, INFORMATIONAL, and HANDLE PERSONALLY. First show one line per email: sender, request, category, and any stated deadline. Draft replies only for routine items after I approve the list. Never send. Do not draft legal disputes, complaints, contract negotiations, compensation discussions, trust-fund matters, fair housing concerns, threats, subpoenas, or messages from attorneys. Flag those for me.

| SECTION | PURPOSE |
|---|---|
| URGENT TODAY | Confirmed deadline, safety issue, closing issue, or consumer matter requiring same-day review. |
| NEW OPPORTUNITIES | Buyer, seller, speaking, teaching, coaching, recruiting, or partnership inquiry. |
| LOGISTICS | Scheduling, signatures, access, document routing, reminders, and routine coordination. |
| HANDLE PERSONALLY | Legal, contract, compensation, ethics, Fair Housing, trust funds, complaints, or conflict. |

RECIPE 2

# THE MORNING BRIEFING

A useful briefing does not repeat everything. It identifies what is true, what is due, and what deserves your best attention.

**SCHEDULED BRIEFING PROMPT**

Each weekday morning, prepare my business briefing: (1) today's calendar with time, location/link, purpose, and preparation needed; (2) the three to five messages that matter most, with new opportunities first; (3) follow-ups with no response for three or more business days; (4) deadlines or risks requiring human review; (5) the one revenue- or relationship-producing activity I should protect before noon; and (6) anything that must be handled personally under my Georgia compliance rules. Do not send or alter anything.

## Before relying on it

| | |
|---|---|
| ☐ | Correct time zone and business-day assumptions |
| ☐ | Calendar events and travel time verified |
| ☐ | Deadlines checked against original documents |
| ☐ | No AI-generated deadline treated as authoritative |
| ☐ | Priority task fits the 90-day plan |
| ☐ | Sensitive matters separated for personal handling |

RECIPE 3

# WALK IN PREPARED

Preparation should help you listen better—not script a relationship or predetermine an answer.

**BEFORE-MEETING PROMPT**

Prepare me for my [time] meeting with [name]. Using only information I am authorized to access, summarize: who they are, the purpose of the meeting, what has already been agreed, what each person is waiting on, stated concerns, open questions, documents I should review, and the one outcome I should pursue. Separate facts from your inferences. Flag anything involving agency, contracts, compensation, Fair Housing, deadlines, disputes, or legal advice for my personal review.

## The five-minute preparation check

- What does this person need from me?
- What do I still need to learn?
- What promise or deadline must I verify?
- What decision am I authorized to make?
- What should I not answer without broker, attorney, lender, inspector, or other expert input?

RECIPE 4

# WALK OUT FOLLOWED UP

Immediately after the meeting, dictate the messy facts while they are fresh. Then let AI organize—not invent—the recap.

**FOLLOW-UP PROMPT**

Based only on my notes below, draft a follow-up in my voice. Recap what was discussed without creating new promises. List next steps, the responsible person, and the stated due date. Clearly label anything I need to confirm. End with a warm, direct call to action. Save as a draft only; do not send. [Paste or dictate notes.]

| SECTION | PURPOSE |
|---|---|
| GOOD RECAP | Facts, decisions, responsibilities, verified dates, and clearly labeled open questions. |
| RISKY RECAP | New commitments, invented deadlines, unapproved interpretations, or language that modifies a contract. |
| HUMAN REVIEW | Agency, price, compensation, repair negotiations, earnest money, disputes, defaults, legal rights, or threats. |

**REMEMBER**

An email recap is communication. It is not a substitute for the correct agreement, amendment, notice, or brokerage procedure.

WEEKLY SYSTEM

# AUDIT MY WEEK—HONESTLY

A weekly audit should measure controllable behaviors, reveal neglected follow-up, and help you adjust next week before the quarter gets away from you.

**WEEKLY AUDIT PROMPT**

Review my authorized calendar, task, and email activity for the last seven days against my current weekly scorecard. Show: actual activity versus target; time spent on revenue, relationships, teaching, brokerage responsibilities, and administration; overdue follow-ups; work I avoided; and the one or two calendar-ready changes that will improve next week. Do not praise activity that did not move a priority forward. Ask before adding or changing calendar events.

## Measure inputs you control

- Meaningful conversations
- Follow-ups completed
- Appointments or speaking conversations
- Classes promoted or delivered
- Content or resources completed
- Brokerage/compliance priorities closed
- Protected personal and renewal time

CLIENT SYSTEM

# THE FOLLOW-UP WRITER

Different relationships require different follow-up. The message should protect dignity, avoid pressure, and make the next step easy.

| SECTION | PURPOSE |
|---|---|
| ACTIVE LEAD | Confirm need, answer the stated question, and give one clear next step. |
| QUIET LEAD | Reopen the door without guilt, manipulation, or manufactured urgency. |
| PAST CLIENT | Offer useful value, remember the relationship, and avoid treating the person like a transaction. |
| STUDENT/AGENT | Restate the commitment, resource, or deadline and ask for one concrete response. |

**PROMPT**

Write a follow-up to [person] about [situation]. Give me a short text version and a professional email version. Sound warm, confident, direct, and helpful—not needy or salesy. Do not invent urgency, results, market facts, or promises. Include one simple next step.

DAILY SYSTEM

# PLAN THE DAY AROUND THE WORK THAT MATTERS

A full calendar is not proof of a productive day. Use AI to make tradeoffs visible and protect the highest-value work before reactive tasks take over.

**DAILY PLANNING PROMPT**

Using today's verified calendar, current priorities, and the task list below, build a realistic time-blocked day. Protect one revenue-producing task before noon, include preparation and travel buffers, group routine communication, leave space for unexpected broker or client issues, and identify what should be delegated, delayed, or deleted. Do not move existing appointments without asking. [Paste task list.]

## Daily filter

| SECTION | PURPOSE |
|---|---|
| MUST MOVE | One outcome that materially advances revenue, service, compliance, or a committed deadline. |
| SHOULD MOVE | Important work with a clear next step and scheduled block. |
| CAN WAIT | Useful but not urgent work that should not steal prime time. |
| SHOULD LEAVE | Low-value work to delegate, automate, simplify, or stop. |

COMMUNICATION SYSTEM

# HANDLE OBJECTIONS WITHOUT OVERPROMISING

Use AI to rehearse and organize—not to create pressure tactics or commitments your agreements cannot support.

**OBJECTION PROMPT**

The person said: “[exact words].” Help me respond calmly in my voice. First identify the concern beneath the objection. Then provide: (1) a natural say-it version, (2) a concise send-it version, and (3) three questions I can ask before responding. Do not argue, promise outcomes, disparage competitors, steer, discuss protected classes, or state contract/legal conclusions. Flag compensation, agency, Fair Housing, lending, inspection, appraisal, and legal issues for verification.

## Practice mode

Ask the AI to role-play a skeptical Atlanta-area buyer, seller, agent, student, or broker. Practice listening, clarifying, and explaining your process without becoming defensive.

CLIENT EXPERIENCE

# THE WELCOME & NEXT-STEPS PACK

A clear welcome reduces anxiety and repeat questions. It should explain process without guaranteeing timing, outcomes, approval, or legal rights.

**WELCOME-PACK PROMPT**

Draft a welcome email and plain-language next-steps roadmap for my new [buyer/seller/student/coaching client]. Use my approved process and voice. Explain what happens next, who owns each step, how we will communicate, what documents or decisions may be needed, and which dates must be confirmed from the governing agreement or schedule. Do not invent contract terms, deadlines, fees, vendor requirements, or outcomes.

## Include

- Warm confirmation and primary contact information
- Communication expectations and response windows
- Milestones in plain language
- Client responsibilities and decision points
- Professional referrals framed without guarantees
- Clear instruction to ask questions early

GEORGIA GUARDRAILS

# ADMINISTRATION DOES NOT REMOVE ACCOUNTABILITY

The more capable the workflow becomes, the more important the review standard becomes. Administrative convenience must remain subordinate to Georgia law, GREC rules, brokerage policy, Fair Housing, confidentiality, contracts, and consumer protection.

| | |
|---|---|
| ☐ | Verify all dates against the signed documents and approved transaction system. |
| ☐ | Route trust-fund and earnest-money matters through the broker’s required process. |
| ☐ | Do not allow AI to negotiate, interpret legal rights, or create contract language without authorized review. |
| ☐ | Keep client/customer data limited, necessary, secure, and authorized. |
| ☐ | Confirm advertising and electronic communications comply with brokerage identification and approval rules. |
| ☐ | Escalate complaints, threats, disputes, attorney communications, subpoenas, and possible violations. |
| ☐ | Document human approval for consequential communications. |
| ☐ | Periodically review connectors, permissions, automations, and scheduled tasks. |

**COMPLIANCE NOTE**

This playbook is educational and operational. It does not replace current Georgia law, GREC rules, brokerage policy, approved forms, or qualified legal advice.

COMPLETION

# THE AI ADMIN CHECKLIST

| | |
|---|---|
| ☐ | Administrative headquarters created |
| ☐ | Approved knowledge files added |
| ☐ | Connector permissions reviewed and limited |
| ☐ | Read-only connector test passed |
| ☐ | Inbox triage run and adjusted |
| ☐ | Morning briefing reviewed for accuracy |
| ☐ | One meeting prepared and followed up |
| ☐ | Weekly audit completed |
| ☐ | Daily planning workflow tested |
| ☐ | Follow-up and objection drafts reviewed |
| ☐ | Welcome pack customized |
| ☐ | Georgia guardrails added |
| ☐ | Quarterly permissions review scheduled |

**YOU ARE READY WHEN**

The system saves time without making hidden decisions, sending unreviewed messages, or weakening your professional oversight.

ONE-PAGE REFERENCE

# THE ADMIN SYSTEM AT A GLANCE

| WORKFLOW | DEFAULT INSTRUCTION |
|---|---|
| MORNING | Prepare my verified briefing. Do not change or send anything. |
| INBOX | Sort first. Show me the list. Draft only after approval. |
| MEETING PREP | Separate facts, inferences, open questions, and compliance flags. |
| FOLLOW-UP | Recap only what occurred; label anything that requires confirmation. |
| DAILY PLAN | Protect the priority task; ask before changing commitments. |
| WEEKLY AUDIT | Compare actions to targets; recommend one or two adjustments. |
| CLIENT CARE | Write useful, respectful follow-up with one clear next step. |
| ESCALATE | Contracts, compensation, trust funds, disputes, legal issues, Fair Housing, complaints, and deadlines. |

**THE RULE**

AI reads, organizes, and drafts. Deb verifies, decides, approves, and sends.

SUPPORT

# COMMON QUESTIONS

### Do I have to connect my accounts?

No. You can use manually provided summaries and approved files. Connectors add convenience, but they also require permission and privacy review.

### What if AI marks the wrong message urgent?

Correct the rule and rerun. Keep a short list of senders, topics, and deadlines that always require personal review.

### Can it send routine messages automatically?

This playbook uses a draft-only standard. Automatic sending increases the risk of wrong facts, wrong recipients, confidentiality breaches, and unapproved commitments.

### Can it calculate contract deadlines?

It may assist with organization, but the original signed documents and approved brokerage systems remain authoritative. Verify every date.

### What if the draft sounds generic?

Run the work inside your headquarters with your approved AI Business Brain attached, then provide one real example that sounds like you.

### How often should I review access?

At least quarterly and whenever a password, role, brokerage, team member, platform, or policy changes.

MAKE IT YOURS

# MY ADMIN NOTES & NEXT MOVES

| PROMPT | MY NOTES |
|---|---|
| Rules I need to add | |
| Messages AI must never draft | |
| My morning briefing time | Time: ____________________________ |
| My protected priority block | Day/Time: ________________________ |
| My weekly audit | Day/Time: ________________________ |
| Connector review date | Date: ____________________________ |

## The first hour this system gives back

______________________________________________________________________

______________________________________________________________________

______________________________________________________________________

**FINAL REMINDER**

Use the time you recover for work that needs a human: judgment, service, teaching, leadership, listening, and relationships.