

A FREE GUIDE FOR REAL ESTATE AGENTS

The AI Buyer Consultation Playbook

Five copy-and-paste prompts and a 30-day plan to turn your buyer consultation into a system you can repeat, measure and improve.

No special software. Works with any AI assistant you already use.



Real estate coaching
clubwealth.com

Why a system beats a script

Most agents have a buyer consultation they "just do." It changes with their mood, their schedule and how the last buyer went. A system is different: the same questions, in the same order, every time, with the follow-up already planned. That is what makes your results something you can improve instead of something you hope for.

AI is the fastest way to build that system. Not by replacing you, but by doing the slow first draft work in minutes: your outline, your questions, your objection answers, your follow-up messages. You then edit it in your own voice and make it yours.

How to use this guide

- Work through the five steps in order. Each one takes 15 to 30 minutes.
- Paste each prompt into your AI assistant, replace the **[brackets]** with your details, and edit the answer until it sounds like you.
- Save every finished piece in one folder. By the end you have a complete buyer consultation system.

Three rules before you start

1. **Never paste a client's private details** (full names, phone numbers, financial documents) into an AI tool. Use placeholders like "Buyer A."
2. **Check everything.** AI can state wrong facts with confidence. You are responsible for what you say to a client.
3. **Follow your brokerage's rules** and Fair Housing law. See the guardrails on page 6.

STEP	WHAT YOU BUILD	TIME
1	Your consultation outline	20 min
2	A pre-consultation questionnaire	15 min
3	Your answers to the hard questions	25 min
4	A follow-up sequence	25 min
5	A practice partner	15 min

STEP 1

1

Build your consultation outline

A good buyer consultation answers four questions for the buyer: **Who are you? What is the process? How will we work together? What happens next?** This prompt has the AI interview you first, so the outline reflects how you actually work.

PROMPT 1: THE INTERVIEW

Act as a veteran real estate coach. I am a [solo agent / team member] in [your market]. I want to build a repeatable buyer consultation that takes about [45] minutes.

Before you write anything, interview me. Ask me one question at a time about how I work with buyers today: how I meet them, what I explain, what I ask, how I talk about agency and compensation, and how I follow up. Wait for each answer. After about 10 questions, write a timed outline of my consultation with a short talk track for each section, in my voice.

When the outline arrives, read it out loud. Cut anything you would never say. Add one story or example you use with real buyers.

Check your outline for these four things:

A clear explanation of how you are paid and what the buyer agrees to, in language your brokerage and state rules allow.

A moment where the buyer says their goals out loud.

A plain description of the process from first showing to closing.

A specific next step, with a date, at the end.

STEP 2

2

A pre-consultation questionnaire

Send a short questionnaire before the meeting so you spend the consultation advising, not collecting basics. Keep it to eight questions or fewer. Every extra question lowers the chance it gets answered.

PROMPT 2: THE QUESTIONNAIRE

Write a friendly eight-question pre-consultation questionnaire for home buyers, to send by email or text before we meet. Cover timeline, price comfort zone, must-haves, deal-breakers, who else is involved in the decision, and whether they are already working with an agent. Do not ask about any protected characteristic. Keep each question under 20 words and make it easy to answer on a phone.

STEP 3

3

Your answers to the hard questions

Buyers in any market ask the same difficult things: Why should I pay you? Can I wait for rates or prices to change? Why not just call the listing agent? Prepare honest, calm answers once, then use them every time.

PROMPT 3: THE OBJECTION BANK

I am a real estate agent in [your market]. List the 12 hardest questions a home buyer asks in a first consultation, including questions about my compensation, waiting for a better market, and working with the listing agent. For each one, write a calm, honest, two-to-three sentence answer in my voice. Do not exaggerate, do not make promises about prices or appreciation, and do not criticise other agents. Flag any answer that depends on local law or my brokerage's policy so I can confirm it.

Read every answer aloud. If it sounds like a pitch, rewrite it as the answer you would give a friend.

STEP 4

4

A follow-up sequence

Most buyers do not decide in the room. The agent who follows up clearly, kindly and on schedule is usually the one who is remembered. Build the sequence once and load it into your CRM.

PROMPT 4: THE FOLLOW-UP

Write a six-touch follow-up sequence for a buyer I just met with, spread over 14 days: a same-day thank-you text, a next-day email with a short recap and the agreed next step, a day-3 helpful resource, a day-7 check-in, a day-10 market snapshot for [neighborhood], and a day-14 "should I keep you on my list?" message. Each message should be under 70 words, warm and direct, with one clear call to action. Use [placeholders] for names and details and never include anything that could be read as a guarantee.

WHEN	TOUCH	GOAL
Same day	Thank-you text	Be remembered
Day 1	Recap email	Confirm the next step
Day 3	Helpful resource	Add value
Day 7	Check-in	Reopen the conversation
Day 10	Market snapshot	Stay relevant
Day 14	Keep-in-touch ask	Get a clear yes or no

STEP 5

5

A practice partner

PROMPT 5: THE ROLE-PLAY

Role-play a first buyer consultation with me. You are a first-time home buyer named "Buyer A," somewhat nervous and comparing agents. Stay in character. Ask me realistic questions, including two difficult ones, and wait for my reply each time. After 10 exchanges, step out of character and give me a score from 1 to 10 on clarity, warmth and structure, with three specific things to improve.

Do this twice a week for a month. Practice is the part most agents skip, and it is the cheapest way to improve.

Guardrails and your 30-day plan

Guardrails

- **Fair Housing.** Never ask AI to screen, steer or describe buyers or neighborhoods using race, color, religion, sex, disability, familial status or national origin, or any other protected class under federal, state or local law.
- **Privacy.** Use placeholders instead of real client details. Check your brokerage's policy on AI tools and client data.
- **Accuracy.** Verify every fact, number and legal statement before you send it. Treat AI output as a draft.
- **Your license, your voice.** You decide what goes out under your name. Edit everything.
- **Compensation and agency.** Rules differ by state and brokerage. Confirm your explanation with your broker.

Your 30-day plan

WEEK	DO THIS
1	Run Prompts 1 and 2. Finish your outline and questionnaire and use them on your next buyer.
2	Run Prompt 3. Practise your answers out loud until they feel natural.
3	Run Prompt 4. Load the follow-up sequence into your CRM so it runs on its own.
4	Run Prompt 5 twice. Review what worked with a coach, a mentor or a trusted colleague, and revise.

Track two numbers. How many consultations you hold each month, and how many of those buyers sign with you. When both are written down, you can see what to fix.

This guide is educational and is not legal, tax or financial advice. Laws and brokerage rules vary. Confirm anything that affects how you serve clients with your broker or an attorney.

WHAT NEXT

Systems stick when someone holds you to them

Building the system is the easy half. Using it every week, when the market is busy and the calendar is full, is the hard half. That is where coaching helps: a plan built for where you are, and someone who checks that you did it.

Club Wealth coaches real estate agents and team leaders. Every coach is a working real estate professional, and agents are placed with a coach by their production level so the advice fits their business.

Join a free Explain Call

A live group call where a Club Wealth coach explains how the coaching program works, how the tiers are set up and what the next step looks like. Bring your questions. There is no obligation to join anything.

clubwealth.com/explain-call

Questions agents ask before they join

- **Is the call a sales pitch?** It is an explanation of the program with time for your questions. You decide what, if anything, to do next.
- **Do I need to be a top producer?** No. Coaching is organized by production level so you are working with people who have been where you are.
- **What if I am still evaluating?** That is normal. Come to the call, ask your questions and decide on your own timeline.

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