

The AI-Powered Agent

How To Market, Communicate, and Close More Transactions

Key Insight: AI doesn't replace great agents. It replaces the parts of the job that keep them from being great.

Think of AI as your BACK OFFICE — and you as the FRONT OFFICE.

PART ONE

Understanding AI

The Main AI Platforms

ChatGPT	The generalist. Great starting point for almost anything.
Claude	Deep, thoughtful responses and writing. Excellent at coding.
Gemini (Google)	Best for image generation, video, and Google Workspace integration.
Perplexity	Built for research. Finds and cites sources from the internet.

Forms of AI — Know the Difference

AI	The broad umbrella term for the technology.
AI Assistant	Does what you tell it. Doesn't make decisions on its own.
AI Agent	Takes a goal and goes to work. Has access to tools and memory.
AI Automation	Repeatable workflows that run automatically without your input.

5 Steps for Better Prompting

The quality of what AI gives you is almost entirely determined by how well you ask. Use this framework:

- **1. Provide the role**
 - Example: "You are an experienced real estate agent in Salt Lake City..."
- **2. Give it context**
 - What situation, what goal, what constraints?
- **3. Use examples**
 - Show it what good looks like — paste in a sample if you have one.
- **4. One outcome**
 - Ask for one thing at a time. Focused prompts get focused results.
- **5. Reverse engineer**

- Ask AI to critique or improve its own output.

Make AI Work Like Your Personal Assistant

Use personalization settings and memory so AI already knows who you are every time you open it.

Custom Instructions / Personalization

- Your role, market, and experience level
- Preferred tone and communication style
- Output format preferences (bullets, paragraphs, short vs. long)
- Guardrails — things it should never do or say

AI Memory — What to Store

- Your market and niche
- Your business model and goals
- Tools you already use
- Personal constraints and availability
- Things it should always remember (e.g., your broker's name, your brand voice)

AI Tools for Content and Marketing

Text → Image	Fal.ai · Gemini · Juggernaut · Minimax · Veo 2/3
Text → Video	Fal.ai · Kling · Veo 3 · Sora · CapCut
Image → Video	Fal.ai · Veo 2 · Kling 2.1 · Hunyuan · Pixverse
Digital Avatar	Fal.ai + Flux-LoRA (training) · HeyGen (video avatar)

Compliance & Ethical Use

The main compliance concerns with AI are the same issues that have always existed: Disclosure and Misrepresentation.

When in doubt, disclose. AI-generated content, images, and video should be clearly identified where required by your brokerage or state law.

PART TWO

Building Your AI-Powered Marketing System

The Math Behind Your Database

“For every twelve people in your database to which you market yourself thirty-three times, you can reasonably expect to net two sales.”

— Gary Keller, The Millionaire Real Estate Agent (2003)

The formula hasn't changed. What has changed is your ability to execute it. Most agents never come close to 33 meaningful touches per year — not because they don't want to, but because doing it manually is unsustainable.

An AI-powered marketing system makes 33 touches per year the floor, not the ceiling — running automatically in the background while you focus on the front office work only you can do.

The 6 Automations of a Complete Database Marketing System

Each of the following automations runs on its own cadence — no manual effort required once it's set up. Together, they create a complete, always-on marketing system for your sphere.



Weekly Social Ad to Your Database

AI generates one polished social media post per week tailored to your voice. The post is then promoted as a paid ad targeting your database via a Facebook Custom Audience — because organic posts are rarely seen. The ad fixes that, putting your content directly in front of the people who already know you.



Database Trust-Building Emails — Weekly

A weekly email goes out to your database with value-driven content: market insights, home tips, local news. AI writes it. You stay top-of-mind as the trusted expert — consistently, every week, without writing a single word.



Quarterly Contact Notifications — Daily

Every day, the system surfaces a small batch of contacts who are due for a personal outreach — rotating through your entire database each quarter. You get a daily nudge with context so you can make a quick, genuine connection.



Personalized Birthday Emails — Automatic

On each contact's birthday, they receive a personalized email that feels human — not a generic blast. AI personalizes based on what you know about them. Small gesture, big impression.



Home Anniversary CMA — Annual

On the anniversary of each client's home purchase, they automatically receive a Comparative Market Analysis showing what their home is worth today. One of the most powerful relationship touchpoints in the business — delivered automatically.



Annual Client Appreciation Event

Once a year, AI helps plan, promote, and execute a client appreciation event for your sphere. From choosing a concept to drafting invitations and follow-up messages, AI handles the heavy lifting so you can show up and build relationships.

Why This System Works

Consistency	It runs whether you're busy, on vacation, or in a slump.
Personalization	AI makes each touchpoint feel tailored, not templated.
Multiple channels	Email, social, ads, and direct outreach — covering every angle.
Compounding trust	Each touchpoint builds on the last. Over time, your sphere thinks of you first.
High-value trigger moments	Birthdays and anniversaries create natural, welcomed conversations.

Getting Started: What You Need

- A clean, organized contact database (CRM, spreadsheet, or phone contacts)
- An email marketing platform (Mailchimp, ActiveCampaign, etc.)
- A Facebook Business account for Custom Audiences
- Access to an AI platform (ChatGPT, Claude, or similar)
- An automation tool to connect everything (Make.com, Zapier, etc.)

Your Next 3 Steps

1. Export and clean your database. You can't market to contacts you don't have organized.
2. Pick one automation to start with. The quarterly contact notification is the highest-ROI place to begin.
3. Set a 90-day goal. What does "staying in touch" look like for your business by then?

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