



Guide 2 | Capture Every Meaningful Conversation

Keep Client Details, Promises, and Follow-Up Organized in Home.

A lot of your business happens in conversations.

You learn what a buyer really wants.

A seller changes their timing.

A past client mentions a future move.

Someone at an open house asks you to follow up.

You promise to send something tomorrow.

Those details can easily end up living in your memory, email, texts, or Notes app.

A strong client experience gets easier when the important information from each interaction is organized inside your **Home CRM**.

Think about the Four Seasons experience. The next person helping you can pick up where the last person left off because the information lives in a system.

| You can run your client relationships the same way.

After Every Meaningful Conversation

Talk → Capture → Organize → Next action

1. Talk

Have the actual conversation.

2. Capture

Share the important information from the conversation with AI Assistant so it can help capture and organize the interaction inside your Home CRM.

Tell AI Assistant:

- Who you spoke with
- What type of interaction occurred
- When it happened
- What was discussed
- Important client details
- Decisions or changes
- Promises you made
- Follow-up that needs to happen
- Any deadlines

The goal is to give AI Assistant enough accurate information to turn the conversation into an activity, CRM note, and next actions inside Home CRM.

3. Organize

Make sure the important information from the interaction is stored in the right places in Home CRM.

4. Next action

Capture what you promised and when it needs to happen.

| Every promise is a task.

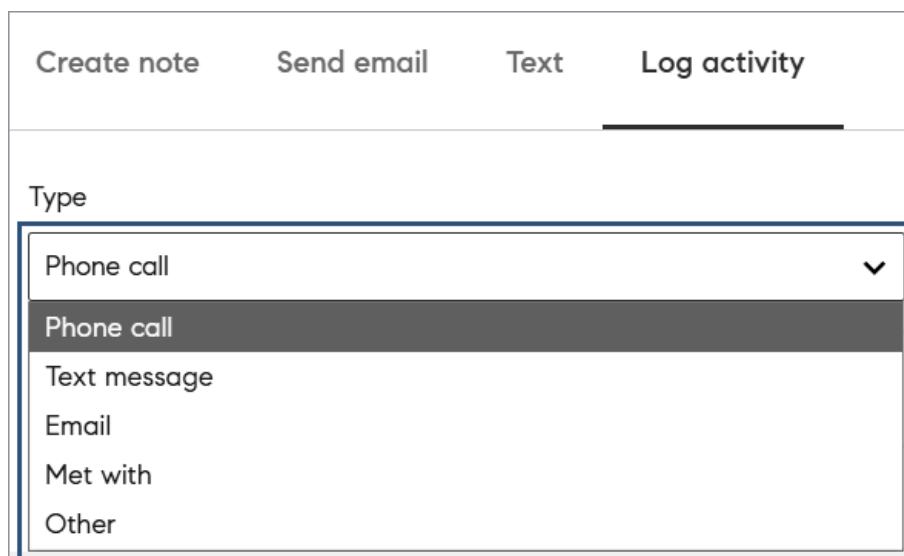
The Home CRM Workflow

Every meaningful interaction should leave behind three things:

1. Log the Activity

What happened?

Log the interaction so there is a record of when and how you connected.



The screenshot shows a web interface for logging activity. At the top, there are four tabs: 'Create note', 'Send email', 'Text', and 'Log activity'. The 'Log activity' tab is selected and underlined. Below the tabs is a label 'Type' followed by a dropdown menu. The dropdown menu is open, showing a list of options: 'Phone call' (which is highlighted with a dark background), 'Text message', 'Email', 'Met with', and 'Other'. A small downward arrow is visible on the right side of the 'Phone call' option in the dropdown.

Examples:

- **Phone Call**
- **Met With**
- **Other**

Include the correct date and time when relevant.

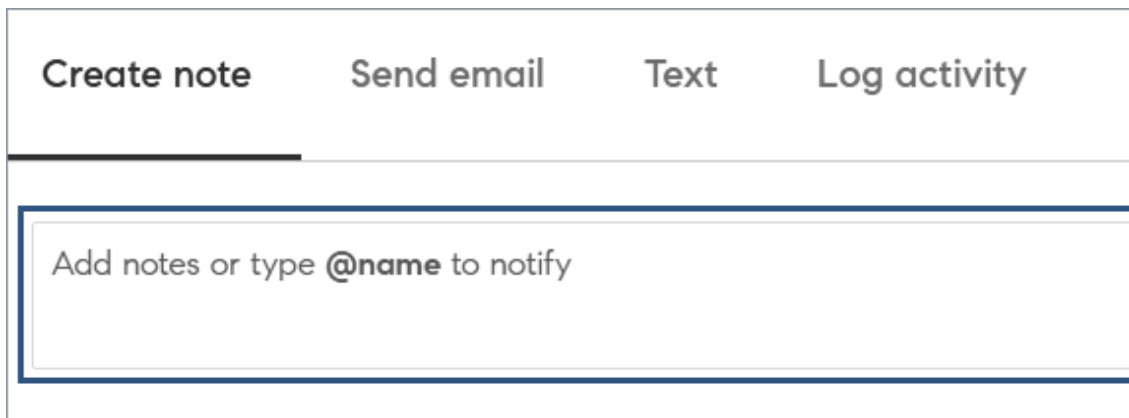
Why it matters

The activity creates a history of the relationship so you, your team, or anyone supporting the client can understand when the interaction took place.

2. Create the Note

What matters?

The note should capture the information you will want the next time you speak with this person.



The screenshot shows a CRM interface with a top navigation bar containing four buttons: 'Create note', 'Send email', 'Text', and 'Log activity'. The 'Create note' button is highlighted with a dark underline. Below the navigation bar is a large text input field with a blue border. Inside the field, there is a placeholder text that reads 'Add notes or type @name to notify'.

Include:

- What was discussed
- Important client details
- Decisions that were made
- Preferences or concerns
- Questions that are still open
- Changes in timing or priorities
- Promises you made
- Relevant context for the next conversation

A useful CRM note should answer:

| What did I learn that will help me serve this person better next time?

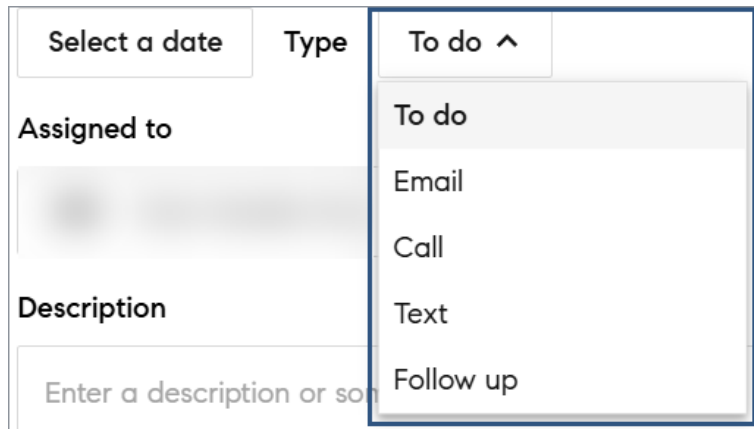
3. Create the Task

What happens next — and by when?

Every promise should have a next action and a clear expectation for timing.

Choose the appropriate task type:

- **To Do**
- **Email**
- **Call**
- **Text**
- **Follow Up**



The screenshot shows a task creation form with a blue border. On the left, there are labels for 'Select a date', 'Assigned to', and 'Description'. The 'Type' label is positioned above a dropdown menu that is currently open, showing a list of task types: 'To do', 'Email', 'Call', 'Text', and 'Follow up'. The 'To do' option is highlighted at the top of the list. Below the 'Description' label, there is a text input field with the placeholder text 'Enter a description or so'.

For every task, include:

A clear task name

What needs to happen?

A deadline

When did you promise to do it?

The task + timing in the description

Write the action and timing clearly.

Example

Task Name: Call Sarah — Review Listing Timing

Due: Friday

Description: Call Sarah — Review Listing Timing by 3:00 PM

Then add any context you will need when you come back to complete the task.

Why This Matters

This creates explicit alignment around expectations and timing.

When you review your tasks later, the description helps you quickly understand:

1. What needs to happen
2. When it needs to happen
3. Which tasks should be completed first
4. Which commitments carry the greatest urgency or client impact

Over time, this makes your task list more useful because it helps you prioritize the order of execution instead of just showing you a list of things to do.

Part 3

Two Ways to Capture the Conversation With AI Assistant

Option 1 — Tell AI Assistant What Happened

Use this option when you already know the important information from the conversation.

Open AI Assistant and share:

- Who you spoke with
- What type of interaction occurred
- When it happened
- What was discussed
- Important client details
- Decisions or changes
- Promises you made
- Follow-up that needs to happen
- Any deadlines

Then ask AI Assistant to:

Log the activity

Record what happened.

Create the CRM note

Organize the important client details and context.

Create the next tasks

Turn promises and follow-up into tasks with clear deadlines.

Review the actions

Show you the proposed activity, note, tasks, and due dates before anything is created or updated.

Then ask:

| Is there anything I left out or anything I should ask the next time we connect?

Review everything before approving it.

Option 2 — Use the Capture My Conversation Interview Prompt

Use this option when you want AI Assistant to **interview you** and help make sure the important information from the conversation is captured and stored in your **Home CRM**.

1. Open AI Assistant.
2. Type: **/prompt**
3. Select: **CORCORAN | Capture My Conversation**

AI Assistant will interview you **one question at a time**.

Answer based on what actually happened.

When the interview is complete, AI Assistant will organize the information so it can be stored in your Home CRM as:

- The activity
- The CRM note
- Follow-up tasks
- Due dates
- Important information you may still need to learn

Review the proposed actions, then approve them once everything is accurate.

The full prompt and setup instructions are in: **Guide 3 — Set Up Your Corcoran AI Prompts**

Part 4

When to Use This Workflow

Use it after meaningful interactions such as:

- Past-client conversations
- New leads
- Active seller conversations
- Active buyer conversations
- Listing appointments
- Buyer consultations
- Open-house leads
- Buyer tour debriefs
- Likely to Sell conversations
- Make Me Sell conversations
- Showing feedback
- Important referral conversations
- Any interaction where you learned something important or made a promise

Before You Approve Anything

Take a few seconds to review the information.

Activity

- ☐ Correct person
- ☐ Correct activity type
- ☐ Correct date and time
- ☐ Accurately reflects what happened

Note

- ☐ Important details are captured
- ☐ Decisions are accurate
- ☐ Open questions remain open
- ☐ No information was added that the client did not give you

- ☐ Promises are recorded correctly

Task

- ☐ Every promise has a task
- ☐ Correct person
- ☐ Clear task name
- ☐ Correct due date
- ☐ Task + timing are included in the description
- ☐ Description includes the context needed later
- ☐ An existing task was checked before creating a duplicate

Use It While the Details Are Fresh

After an appointment, showing, open house, or client conversation, capture the interaction as soon as it is practical.

If you are using your phone:

1. Wait until you are safely stationary
2. Open AI Assistant
3. Share or dictate what happened
4. Review names, dates, numbers, and promises
5. Correct anything that was captured incorrectly
6. Review the proposed activity, note, tasks, and due dates
7. Approve once everything is accurate

The same workflow follows you throughout the day:

| Talk → Capture → Organize → Next action

When the conversation is stored in Home CRM, your follow-up is easier, your promises are visible, and your next interaction starts with the context you already earned.

HOME



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