

Training Needs Analysis: Generative AI for Real Estate Agents

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1. Introduction

The purpose of this analysis is to determine the scope of training needed to help agents learn to use Generative AI to assist in sales, marketing, and reporting. Interviews with Leslie Edwards, owner, and nine agents provided a foundation for this report.

2. Organizational Goals & Strategic Alignment

The primary focus of the company is to increase market share in the local residential real estate sector by enhancing agent productivity and the quality of client service.

Key performance indicators (KPIs) relevant to training:

- Time-to-Listing: Reduce the average time between signing a client and having a fully marketed property listed.
- Client Satisfaction Scores: Improve scores related to communication quality and marketing materials.
- Lead Conversion Rate: Increase the percentage of leads that convert to signed clients.
- Agent Productivity: Measure time saved on administrative tasks, re-allocated to client-facing activities.
- Marketing Expenses: Reduce marketing costs.

Strategic Alignment: Implementing GenAI training directly supports the company's primary goals by empowering agents to create higher-quality marketing content faster, personalize client communications at scale, and streamline the report-writing process. This allows them to focus on high-value activities like networking and closing deals.

3. Current State Analysis

Existing training programs: Currently, there is no formalized training on technology tools beyond the basic CRM. Learning is largely self-directed or occurs through informal peer sharing.

Workforce capabilities: The agent team is highly skilled in sales and client relations but has a wide range of technological proficiency. Approximately 60% are comfortable adopting new apps, while 40% express hesitation or lack of confidence with new software.

Identified gaps in skills, knowledge, or performance:

Skill Gap: Inability to write effective prompts for GenAI tools to generate usable content.

Knowledge Gap: Lack of awareness of available GenAI tools and their specific applications in real estate. Uncertainty about data privacy and ethical use of AI.

Performance Gap: Significant time spent manually writing property descriptions, social media posts, and client emails. Marketing materials lack consistency and a professional polish.

4. Data Collection & Findings

Data was collected in the following ways.

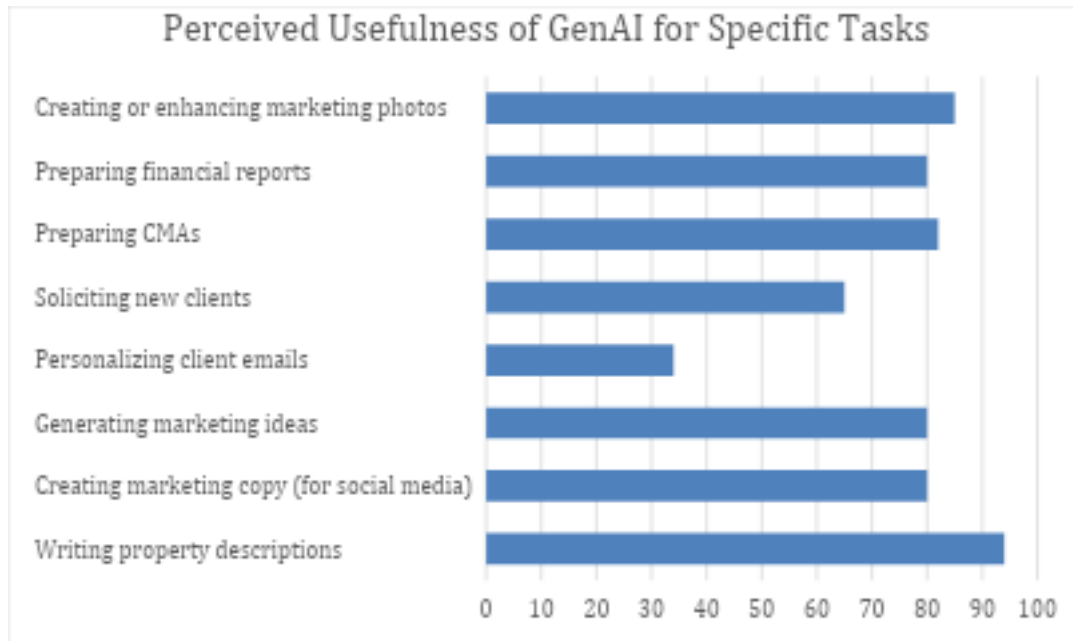
Structured Interviews: One interview with owner Leslie Edwards to understand strategic goals.

Agent Surveys/Focus Groups: Data gathered from nine agents through a combination of surveys and group discussions to assess current skills, attitudes, and perceived needs.

Key insights from employee feedback and performance metrics:

- 90% of agents spend 5+ hours per week on tasks that could be automated (email writing, report drafting, social media content).
- 70% of agents are interested in using AI but feel "they don't know where to start."
- Top Desired Applications: Creating listing descriptions, brainstorming and creating social media content, increasing the quality of photos, and creating reports (client-requested data reports and market reports.)
- Primary Concern: Fear of generating inaccurate or generic ("hallucinated") information and the security of inputting client data into AI tools

Perceived Usefulness of AI for Specific Tasks (Agent Survey Results)



5. Training Needs Identification

Priority areas for development:

1. **AI Fundamentals & Prompt Engineering:** The highest priority is teaching agents how to effectively communicate with AI tools to get high-quality, relevant outputs.
2. **Tool-Specific Application:** Practical, hands-on training using 1-2 core AI tools for real estate-specific tasks.
3. **Ethics & Compliance:** Establishing company guidelines for the responsible and secure use of AI, including data privacy and fact-checking protocols.

Role-specific training needs: All training needs are uniform across the agent role. The owner, Leslie Edwards, requires a high-level understanding to support and evaluate the program's success.

Compliance or regulatory training requirements: While no specific law governs AI use in real estate yet, training must emphasize compliance with existing data privacy laws (e.g., GDPR, CCPA) and the REALTOR® Code of Ethics regarding truthful and non-misleading advertising. All AI-generated content must be rigorously fact-checked.

6. Recommendations

A four-unit e-learning training series will equip agents with the knowledge, skills, abilities to use Generative AI for heightened productivity. Agents overwhelmingly preferred to learn online and asynchronously. The following structure is proposed:

Module 1: Generative AI Essentials for Real Estate

- Introduction to AI with a focus on what it can and cannot do
- Ethical and Legal Compliance
- Categorizing AI tools (so that learners can recognize tools that can help with specific tasks)
- Selecting tools that match tasks
- Writing effective prompts

Module 2: AI for Listings

- Generating basic descriptions
- Creating unique selling propositions (comparing to other properties on the market)
- Creating neighborhood descriptions
- Improving photo quality

Module 3: AI for Report Creation

- Creating a comparative market analysis (CMAs)
- Creating rent comparables reports
- Creating absorption rate and vacancy analysis reports
- Creating local market data analysis reports

Module 4: AI for Marketing

- Predictive lead scoring and identification
- Personalized automated marketing
- Social media and digital listening
- Content creation (blog posts, video scripts and production)

Timeline and resource estimates

Instructional Design & Development: 3 weeks

Pilot Workshop (Instructional Designer, owner, and 2 agents): 1 week

Full Rollout: 4 weeks

Total Project Duration: 8 weeks

7. Implementation Plan

Phase 1 (Weeks 1-3): Development of workshop materials, eLearning videos, and prompt library.

Phase 2 (Week 4): Pilot "GenAI Essentials" workshop with a small group of 3 agents. Gather feedback and refine materials.

Phase 3 (Weeks 5-8): Company-wide rollout. Release eLearning assets and prompt library.

Stakeholder involvement

Leslie Edwards (Owner): Final approval of plan and content, communication of importance to team, participation in training.

Instructional Designer: Design, development, delivery, and evaluation.

Agents: Active participation in training, providing ongoing feedback.

Evaluation and feedback mechanisms

Level 1 (Reaction): Post-learning surveys.

Level 2 (Learning): Simple pre-/post-workshop quiz on key concepts; practical prompt-writing exercise.

Level 3 (Behavior): Observation of discussion board; monitor usage of the shared prompt library.

Level 4 (Results): Track KPIs from Section 2 (e.g., Time-to-Listing, Client Satisfaction) 60-90 days after training completion.

8. Conclusion

Investing in GenAI training will yield significant benefits for the company, including increased agent productivity, enhanced marketing quality, and improved client satisfaction.