# Plan with AI

One prompt for each part of your 2027 plan. Fill in the blanks, then type or paste it into whatever AI app is on your phone: ChatGPT, Claude, Gemini or Copilot. It's the prompt, not the tool.

**Scan a code** to open that prompt on your phone (dkre.ca/ai). Fill in your blanks, tap Copy prompt, and paste it into your AI app.

**Four rules**

1. **No client names, phone numbers or addresses** in a free AI app. Totals and your own numbers only.
2. **Check the math.** AI can be wrong and sound sure of itself.
3. **AI writes the draft; you send it.** Canada's anti-spam law (CASL) and the Do Not Call list still apply.
4. **Ask follow-ups.** "Make it shorter." "What if I only work 44 weeks?" "Explain that like I'm new."

1 · MODELS AND MINDSET

## Find your Big Why

You're helping a real estate agent find their Big Why for a business planning session. Ask me 6 questions, one at a time, about why I do real estate and what I want my life to look like in 3 years. Wait for my answer before asking the next one. At the end, write my Big Why in 2 sentences using my words, not yours. Start with question 1 only.

2 · THE ECONOMIC MODEL

## Work back from the income you want

I'm a real estate agent in Ontario. I want $_____ net income next year. Last year my operating expenses were $_____ and my cost of sale was $_____. My average commission is $ _____ per sale. _____% of my sales are listings sold and the rest are buyers. My conversion rates: _____ (or: "I don't track them, so use the Millionaire Real Estate Agent example rates and tell me which ones you used"). Use the Millionaire Real Estate Agent economic model to work backwards to how many listing appointments and buyer appointments I need per year, per month and per week (I work _____ weeks). Show the math in a simple table and give me the answer in one sentence first. Then tell me what changes if my listing appointment conversion improves by 10 points.

3 · THE LEAD GENERATION MODEL

## Build your 36 to Convert

I'm a real estate agent in _____, Ontario, Canada, with about _____ contacts in my database. Build my 36 to Convert touch plan for past clients and sphere for 2027: exactly 4 phone calls (quarterly), 26 emails (every two weeks), 2 events and 4 pieces of direct mail. Lay it out month by month, January to December 2027. Give each email a subject line, each event an idea that fits a small Ontario town and the season, and a one-line opener for each quarterly call. Use Canadian holidays and seasons. Keep the emails compliant with Canada's anti-spam law (CASL) and tell me in plain words what that requires.

3 · THE LEAD GENERATION MODEL, CONTINUED

## Quarterly call openers

Write 3 short openers for a quarterly check-in phone call with a past real estate client. They should sound like a friendly neighbour, not a salesperson, take under 15 seconds to say, and end with an easy question that gets them talking. No pitch and no asking for referrals in the opener. Then give me one natural way to bring up real estate later in the call if they mention a move.

4 · THE BUDGET MODEL

## Sort your P&L the KW way

Here is my real estate business P&L for last year (category totals only): _____ My subscriptions (optional): _____ Sort every line into Cost of Sales or Operating Expenses using the Millionaire Real Estate Agent budget model. Show my totals and percentages of GCI against the 30/30/40 benchmark in a table. Flag anything that looks high and tell me why in plain words. Then tell me which subscriptions overlap and which one you'd cut first.

From QuickBooks: Reports → Profit and Loss → last year. Type in the category totals only, never the transaction list.

5 · THE ORGANIZATIONAL MODEL

## Your first hire might be software

Here's what I did last week as a real estate agent: _____ Sort every task into three groups: (1) only I can do it, (2) an assistant or transaction coordinator could do it, (3) a tool or AI could do most of it with me checking. Add up roughly how many hours a week groups 2 and 3 take. Then write a short job description for group 2.

6 · PULLING IT ALL TOGETHER

## Build your 4-1-1 and a Friday check-in

My 2027 real estate business plan: net income goal $_____; _____ closed sales; I need about _____ listing appointments and _____ buyer appointments for the year; my database has _____ contacts and I want _____ by year end; I'll call one third of my database every month. Turn this into a KW 4-1-1: annual goals, January's monthly goals, and weekly goals for the 4 weeks of January. Then give me a short check-in I can paste back to you every Friday (which numbers to report), and tell me how you'll respond if I'm behind.

**Next quarter:** run prompts 2 and 6 again with your real numbers. Ten minutes, and your plan stays a plan.