

Realtor AI Companion

A beginner guide for Compass agents using Compass AI with ChatGPT, Claude, Gemini, or another AI assistant.

What is an AI operating system? It is simply a set of instructions, reference files, templates, and prompts that helps an AI assistant work consistently with you.

1. How The Two Tools Work Together

Compass AI = find current Compass information

- Find current contacts, client records, tasks, Collections, listing activity, and open house leads.
- Look up current facts before making a client-specific recommendation.
- Verify listing information in Compass and the multiple listing service (MLS).

Main AI assistant = think, plan, and write

- ChatGPT, Claude, and Gemini are examples of general-purpose AI assistants.
- Use yours to plan, write, prepare for calls, review messages, and compare options.
- Add reusable reference files so you do not repeat instructions in every chat.

Core rule: If an answer depends on current Compass information, look it up first. Give your main AI assistant only the facts needed for the task. Never ask it to guess current Compass facts.

2. Reusable Reference Files To Create

Reference file	What it should explain
Personal Profile for AI	Who you are, what you value, how you sound, and your boundaries.
Business Profile for AI	Your services, ideal clients, priorities, standards, and decision rules.
Communication Rules	Your writing style, preferred answer structure, and phrases to avoid.
How the AI Should Work	How to summarize, suggest next steps, question assumptions, and flag risks.
Decision and Negotiation Guides	The decision, negotiation, communication, and planning methods you use.
Privacy Rules	What stays private and what should not be copied between AI tools.
Reusable Answer Formats	Examples for client summaries, call plans, messages, emails, and notes.
Project Start Instructions	How to review files, separate facts from guesses, and suggest next steps.
Compass AI Instructions	What to look up and which relevant facts to give your main AI assistant.

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Set up the system with one real assignment, then use focused AI jobs to move the work forward.

3. Setup Steps

Start in about 10 minutes	Build the full system over time
1. Choose one client, property, or repeated task. 2. Create a Project or start a new chat. 3. Add your reference files and current documents. 4. Paste the Project Start prompt. 5. Correct anything the AI misunderstood.	1. Use a separate project or chat for each important assignment. 2. Add your standing instructions and reference files. 3. Add current documents and use the Project Start prompt. 4. Correct guesses and label unknowns. 5. Keep decisions, questions, and next steps together.

4. When Information Conflicts, Trust It In This Order

Trust current documents first, then current notes, written instructions, your business and personal profiles, communication rules, decision guides, general real estate knowledge, and finally the AI's guess.

A generic AI answer never overrides current documents, Compass, the MLS, lender guidance, disclosures, client instructions, or professional advice.

5. Useful Jobs For Your AI Assistant

Prompt	Use it for	What the AI should give you
Client Summary	A buyer, seller, lead, referral partner, or past client.	Priorities, limits, confirmed facts, missing information, and next action.
Call Preparation	A client, agent, lender, vendor, or team conversation.	Key facts, questions, the decision needed, and a conversation order.
Message Review	An important text, email, or talking point.	Clear meaning, unintended signals, bargaining risk, and better wording.
Assumption Check	A conclusion you believe may be right.	Unsupported guesses, other reasonable views, and missing facts.
Plan Test	An offer, pricing plan, negotiation, or launch.	Weak spots, likely responses, possible problems, and an alternative.
Daily Focus	A crowded day or week.	The main result, two other priorities, and what can wait.
Save a Repeated Process	A task you do repeatedly.	The goal, steps, quality rules, and points needing judgment.

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Start with one real client or repeated task. Use one prompt at a time, review the answer, and improve your reference files as you work.

6. Copy-And-Paste Starter Prompts

Project start

Review this project's reference files and documents. Separate confirmed facts, reasonable interpretations, and missing information. Tell me what to look up in Compass AI. Then give me a short summary, benefits and downsides, the next 3 actions, and the next question to ask.

Move Compass facts into your AI assistant

I found the current information below in Compass AI. Use only these facts and this project's documents. Do not invent missing details. Create a [client summary, call plan, email, strategy options, or follow-up plan]. Facts: [paste here].

Message check

Review this message from the other person's point of view. Explain what it says, any unintended signal or bargaining risk, and how to make it shorter and calmer. Give me 2 improved versions. Message: [paste here].

Daily focus

Here is today's list: [paste here]. Choose the most important result, two other items that must move, and what can wait. Prioritize client service, urgent transaction issues, key relationships, business-producing conversations, and promises I made.

7. Safety And Quality Rules

Do not invent facts, overstate certainty, create false urgency, use fear, promise outcomes, or give legal, tax, lending, insurance, inspection, appraisal, title, or engineering conclusions. Separate facts from interpretation, label guesses, identify missing information, protect privacy, and keep the final decision with the client.

8. Best First Use

Start with one active client or real project. Add the reference files and current documents you have. Use the Project Start prompt, correct the summary, and then use one prompt at a time.

Start here: Choose one client, one project, and one repeated task. Paulo can help you plan a practical setup for your business.

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