



inman

AI AGENT BUILDER

CERTIFICATION PROGRAM

By the end of this program you will have 7 working Claude agents running in your business – all built by you, in your voice, with your rules.

Learner Instruction Pamphlet

#	AGENT	PRODUCES	BUILT IN
1	Listing Description Agent	MLS copy – HEADLINE, REMARKS, HIGHLIGHTS	Lesson 2.2
2	Buyer Agreement Explainer	Plain-English answers to buyer questions	Lesson 2.3
3	CMA Narrative Generator	One persuasive paragraph for listing presentations	Lesson 2.4
4	Post-Showing Follow-Up	Three drafts – WARM, NEUTRAL, COOL	Lesson 3.2
5	Lead Qualifier Agent	Heat score HOT/WARM/COLD + draft response	Lesson 3.3
6	After-Hours Response	Send-now or save-for-morning draft	Lesson 3.4
7	Brand Agent (Capstone)	Personal FAQ in your voice + qualifying question	Capstone

Keep this pamphlet open alongside the videos. Every agent build has exact steps, prompts to copy, and files to upload.

BEFORE YOU BEGIN

HOW TO USE THIS PAMPHLET

Follow this workflow for every lesson:

- Watch the video lesson all the way through first.
- Come back to this pamphlet and find the matching lesson section.
- Open claude.ai in a separate browser tab.
- Follow the step-by-step instructions here while referring to the video.
- Complete the checklist at the end of each lesson before moving on.
- Download every tool referenced in the lesson and save it in your course folder.

KEY CONCEPT

Create a folder called **Inman AI Cert** on your desktop. Inside it, create subfolders for each module and one called Downloads for all the tools.

WHAT YOU NEED BEFORE YOU START

- A Claude.ai account — free at claude.ai. A paid plan is not required.
- Google Chrome browser — use this for all Claude sessions.
- This pamphlet open on your screen or printed.
- Your course Downloads folder ready on your desktop.

MODULE 1

AI AGENT FOUNDATIONS

3 Lessons | No builds | Downloads: 4 tools

Module 1 is your foundation. No building yet — just the three things you need to understand before your first agent: what an agent actually is, the compliance rules that govern what it can say, and how to navigate Claude Projects.

LESSON 1.1

What an AI Agent Actually Is

KEY CONCEPT

The difference between a prompt, a workflow, and an agent.

THE THREE TERMS TO KNOW

- **PROMPT** — A one-shot question. No memory. Starts from zero every time.
- **WORKFLOW** — Automated steps. Fast and consistent but rigid. Cannot think.
- **AGENT** — A Claude Project with persistent instructions, a defined role, and consistent output format. It reads your rules every session.

THE THREE FEATURES OF AN AGENT

- Persistent instructions — rules the agent reads at the start of every conversation.
- A defined role — a specific job it does and does not wander from.
- Consistent output format — the same structure every time, ready to use.

DOWNLOAD

Agent ROI Calculator

Google Sheet — 12 workflow rows and a time-saved formula. Fill in before Lesson 1.2.

LESSON 1.1 CHECKLIST

- I can explain the difference between a prompt, a workflow, and an agent in one sentence.
- I have downloaded the Agent ROI Calculator and filled in at least 3 rows for my own workflows.
- I have identified which workflow in my business would save me the most time with an agent.

LESSON 1.2

The Real Estate Compliance Frame

KEY CONCEPT

Three compliance rails every agent must follow – fair housing, MLS rules, and NAR settlement.

THE THREE RAILS

- **FAIR HOUSING** – Seven protected classes: race, color, religion, sex, national origin, familial status, disability. Never reference these or proxy language in any agent output.
- **MLS RULES** – No agent contact info in public remarks. Character limits apply. Showing instructions in private remarks only.
- **NAR SETTLEMENT** – Buyer agreements required before showings. Agent output must describe services factually. No compensation promises.

PROXY LANGUAGE TO NEVER USE

- "Walking distance to church" – *religion proxy*
- "Ideal for young families" – *familial status proxy*
- "Safe neighborhood" – *race proxy*
- "Good schools" – *familial status and race proxy*
- "Welcoming community" – *race proxy*

DOWNLOAD**State Compliance Cheat Sheet**

MLS rules for all 50 states. Upload to every listing agent you build.

DOWNLOAD**Banned Proxy Language List**

38 phrases with protected class implications and compliant replacements.

LESSON 1.2 CHECKLIST

- I have downloaded the State Compliance Cheat Sheet and know my state's MLS character limit.
- I have downloaded the Banned Proxy Language List and reviewed the phrases relevant to my market.
- I can name all three compliance rails without looking at my notes.

LESSON 1.3

Your First 10 Minutes with Claude Projects

KEY CONCEPT

How to navigate Claude Projects and build your first practice agent.

HOW TO CREATE YOUR FIRST CLAUDE PROJECT

1. Go to claude.ai in Chrome. Log in.
2. Look at the left sidebar. Click **Projects**.
3. Click **New Project**.
4. Name it: **Practice Project**.
5. Click into the Instructions field. Type:

```
You are a real estate assistant. Always respond in plain English. Always end with one next step.
```

6. Click Save.
7. Click **Add Files** and upload any short document – a market report, a listing, anything.
8. Add a conversation starter: *What should I do before a listing presentation?*
9. Start a conversation inside the Project. Ask a question. Watch it follow your rules.

DOWNLOAD**Starter Prompt Bank**

12 starting instruction blocks, one per agent type. Paste the one you're most excited about

LESSON 1.3 CHECKLIST

- I have created a Practice Project in Claude with at least one instruction.
- I have uploaded one knowledge file to the Project.
- I have started a conversation inside the Project and confirmed the agent follows my instructions.
- I have compared the output from a regular Claude chat versus my Project and seen the difference.

MODULE 2

BUILD YOUR FIRST CLAUDE AGENT

4 Lessons | 3 Agent Builds | Downloads: 8 tools

Module 2 is where you build your first three working agents. Each one solves a real problem immediately. Follow the steps exactly, paste the prompts as written, and you will have three production-ready agents in your Claude sidebar by the end of this module.

LESSON 2.1

How Claude Projects Work

KEY CONCEPT

The four components of a Claude Project and how they work together.

THE FOUR COMPONENTS

- **Instructions** — Standing rules the agent reads at the start of every conversation.
- **Files** — Knowledge documents the agent reads as background. Upload once, use forever.
- **Conversation History** — Full record of every session inside this Project.
- **Conversation Starters** — Preset entry points that appear as buttons when someone opens the Project.

DOWNLOAD

Project Setup Checklist

6-field checklist to complete before building any new Claude Project.

LESSON 2.1 CHECKLIST

- I understand the difference between the Instructions field and the Files section.
- I have downloaded the Project Setup Checklist and will use it for every new agent build.

LESSON 2.2

Build the Listing Description Agent

KEY CONCEPT

Writes publication-ready, fair-housing-clean MLS listing copy in your voice from property data you provide.

STEP-BY-STEP BUILD

1. Open [claude.ai](#) > Projects > New Project.
2. Name it: **Listing Description Agent**.

3. Click into the Instructions field. Paste all 12 instruction blocks from the download in sequence.
4. Go to Files > Add Files. Upload: State Compliance Cheat Sheet, Banned Proxy Language List, and 3 past listings that sound like you.
5. Add three conversation starters:

Write a listing for my property

Help me rewrite this listing

Is this language fair housing compliant?

6. Click Save.

PROPERTY DATA INPUT FORMAT

Beds: 4 | Baths: 2.5 | Sqft: 2,200 | Year built: 1988 | Location: [city, state] | Top 3 features: [f1], [f2], [f3] | Target buyer: [describe]

WHAT YOU GET BACK

- HEADLINE — one sentence, under 12 words, no banned adjectives
- PUBLIC REMARKS — two paragraphs, under 800 characters, fair housing clean
- HIGHLIGHTS — 5 bullet points, each with a verifiable fact

DOWNLOAD

12 Listing Instruction Blocks

Paste into your Instructions field in sequence.

DOWNLOAD

Sample Voice File

3 sample listings to use until you have your own.

LESSON 2.2 CHECKLIST

- My Listing Description Agent is live in my Claude Projects sidebar.
- I have uploaded the State Compliance Cheat Sheet as a knowledge file.
- I have uploaded 3 of my own past listings as voice samples.
- I have run one real property through the agent and received HEADLINE, PUBLIC REMARKS, and HIGHLIGHTS.
- The output contained no banned adjectives and no fair housing proxy language.

LESSON 2.3

Build the Buyer Agreement Explainer

KEY CONCEPT

Answers buyer questions about the representation agreement in plain English. No legal advice. No compensation promises. Ends every answer with an understanding check question.

STEP-BY-STEP BUILD

1. Open claude.ai > Projects > New Project.
2. Name it: **Buyer Agreement Explainer**.
3. Paste this role block into the Instructions field:

```
You are a buyer education specialist working with a licensed real estate agent. Explain the buyer representation agreement in plain English. Never give legal advice, make promises about compensation, or interpret the agreement beyond what it clearly states. End every response with: Does that answer your question, or is there a specific part you want me to explain differently?
```

4. Press Enter twice. Paste this format block:

```
Answer in three to five sentences. Plain English only. No jargon. End every response with the understanding check question above – never skip it.
```

5. Press Enter twice. Paste this limits block:

```
If asked about specific compensation dollar amounts, respond: Your agent will walk you through the specific compensation details. I can explain how buyer agent compensation works in general. Then do that. Never quote a number.
```

6. Go to Files > Add Files. Upload: the Buyer Agreement FAQ List and the NAR Settlement Summary.
7. Add three conversation starters:

```
What am I agreeing to sign?
```

```
Do I have to pay you even if I don't buy?
```

```
What happened with the NAR settlement?
```

8. Click Save.

DOWNLOAD**Buyer Agreement FAQ List**

50 questions with plain-English answers across 4 sections.

DOWNLOAD**NAR Settlement Plain-English Summary**

Upload as a knowledge file.

LESSON 2.3 CHECKLIST

- My Buyer Agreement Explainer is live in my Claude Projects sidebar.
- I have uploaded the Buyer Agreement FAQ List and NAR Settlement Summary.
I have tested the agent with at least 3 buyer questions and confirmed it ends every answer with the
- understanding check question.
- I tested the compensation question and confirmed the agent did not quote a specific dollar amount.

LESSON 2.4**Build the CMA Narrative Generator****KEY CONCEPT**

Takes raw comparable sales data and writes a single persuasive paragraph you deliver at the listing table.

STEP-BY-STEP BUILD

1. Open claude.ai > Projects > New Project.
2. Name it: **CMA Narrative Generator**.
3. Paste the role block into the Instructions field:

```
You are a senior real estate market analyst writing CMA narratives for listing presentations. Make the price recommendation logical, persuasive, and memorable. Explain what the data means – do not just list it.
```

4. Press Enter twice. Paste the structure block:

```
Output one flowing paragraph – no headers, no bullets. Four parts: (1) price recommendation and strongest comp, (2) one market context sentence on DOM or absorption rate, (3) one sentence discounting the weakest comp, (4) a confident closing positioning statement the agent says at the table. Maximum 200 words.
```

5. Press Enter twice. Paste the data intake block:

```
Before generating, ask for: subject property address, sqft, year built, top 2 features. Each comp: address, sold price, sold date, days on market, one key difference from subject. Ask once. Do not generate with fewer than 3 comps.
```

6. Go to Files > Add Files. Upload the CMA Narrative Examples PDF.
7. Add conversation starter: *Generate a CMA narrative from my comp data*. Click Save.

COMP DATA INPUT FORMAT

```
Subject: [address], [sqft] sqft, built [year], features: [f1], [f2] Comp 1: [address], sold $[price], [date], [DOM] DOM, differs: [difference] Comp 2: [address], sold $[price], [date], [DOM] DOM, differs: [difference] Comp 3: [address], sold $[price], [date], [DOM] DOM, differs: [difference]
```

DOWNLOAD**CMA Narrative Instruction Blocks**

Paste into Instructions field.

DOWNLOAD**CMA Narrative Examples**

3 sample narratives at 3 price points. Upload as knowledge file.

LESSON 2.4 CHECKLIST

- My CMA Narrative Generator is live in my Claude Projects sidebar.
- I have uploaded the CMA Narrative Examples as a knowledge file.
- I have run real comp data through the agent and received a single flowing paragraph.
The output had a price recommendation, a market context sentence, a comp discount sentence, and a closing line.
- I have run the output at the next listing appointment.

MODULE 3

AGENTS THAT FOLLOW UP*4 Lessons | 3 Agent Builds | Downloads: 4 tools*

Module 3 builds three agents that close the follow-up window. All three produce drafts only. You review and send every message. Nothing goes out automatically.

LESSON 3.1

The Follow-Up Problem in Real Estate**KEY CONCEPT**

Why follow-up fails (capacity, not motivation) and how the three Module 3 agents solve it.

THE FOUR-HOUR WINDOW

Response rates drop by more than 50 percent after four hours. The three agents in this module are designed to close the window before it ends – even when you are in another showing.

DOWNLOAD**Follow-Up Timing Chart**

Optimal contact windows for 5 agent-buyer touchpoints. Print this and keep it visible.

LESSON 3.1 CHECKLIST

- I understand why the four-hour follow-up window matters.
- I have downloaded the Follow-Up Timing Chart.
- I have identified which follow-up situation is my biggest current gap.

LESSON 3.2

Build the Post-Showing Follow-Up Agent**KEY CONCEPT**

Produces three draft follow-up messages (WARM, NEUTRAL, COOL) after each showing. You pick the version that matches what you observed and send it.

STEP-BY-STEP BUILD

1. Open [claude.ai](#) > Projects > New Project.
2. Name it: **Post-Showing Follow-Up Agent**.
3. Paste into the Instructions field:

You are a real estate relationship manager drafting post-showing follow-up messages. Tone: warm, personal, professional – never salesy. Always reference something specific from the showing. Produce three versions labeled WARM, NEUTRAL, and COOL. Maximum 60 words per version. No exclamation points. No 'just checking in.' End each version with one open question.

4. Press Enter twice. Paste the three-version format block:

WARM: for buyers who showed strong interest. Reference enthusiasm. Ask a decision-moving question. Suggest one next step. NEUTRAL: for buyers still weighing options. Acknowledge complexity. Ask what is still open. COOL: for buyers who were polite but unlikely to return. Keep the relationship open. No pressure.

5. Go to Files > Add Files. Upload the Post-Showing Message Examples PDF.

6. Add conversation starter: *Draft follow-up for my showing today.* Click Save.

SHOWING NOTES INPUT FORMAT

Buyer name: [first name] | Property: [address] | Observations: [2-3 things you noticed] | Interest level: warm / neutral / cool

DOWNLOAD

Post-Showing Message Examples

6 sample messages, 2 per interest level. Upload as knowledge file.

LESSON 3.2 CHECKLIST

- My Post-Showing Follow-Up Agent is live in my Claude sidebar.
- I have tested it with real showing notes and received all three versions – WARM, NEUTRAL, COOL.
- I have sent at least one draft from the agent after a real showing.

LESSON 3.3

Build the Lead Qualifier Agent

KEY CONCEPT

Reads an incoming lead inquiry, assigns a heat score (HOT, WARM, or COLD), and drafts a response that asks the right qualifying questions.

THE FOUR QUALIFYING QUESTIONS

- **TIMELINE** – When do they need to move?
- **FINANCING** – Pre-approved, pre-qualified, or cash?
- **MOTIVATION** – What is driving the move?

- **FLEXIBILITY** — How firm are they on price and location?

STEP-BY-STEP BUILD

1. Open claude.ai > Projects > New Project.
2. Name it: **Lead Qualifier Agent**.
3. Paste into the Instructions field:

```
You are a real estate lead intake specialist. Read the incoming inquiry. Assign a heat score – HOT (pre-approved or cash, timeline under 90 days, specific property interest), WARM (some readiness signals but missing key factors), or COLD (browsing, no timeline, vague intent) – with a one-sentence explanation. Then draft a response asking two of the four qualifying questions. Do not ask all four at once. Close with one clear next step.
```

4. Press Enter twice. Paste the tone block:

```
Tone: warm, direct, human. Not a form letter. Write as if you are a trusted advisor genuinely trying to help. Never say "Great question" or "I would love to help you on your real estate journey."
```

5. Go to Files > Add Files. Upload the Qualifying Question Bank.
6. Add conversation starter: *Qualify this lead*. Click Save.

DOWNLOAD

Qualifying Question Bank

40 phrasings of the 4 qualifying questions at different warmth levels.

LESSON 3.3 CHECKLIST

- My Lead Qualifier Agent is live in my Claude sidebar.
- I have tested it with a HOT lead, a WARM lead, and a COLD lead.
- Each test produced a heat score on the first line followed by a draft response.
- I have qualified at least one real incoming lead using the agent.

LESSON 3.4

Build the After-Hours Response Agent

KEY CONCEPT

Drafts holding responses for leads that arrive outside business hours. Two modes — send now (under 50 words) or save for morning (under 60 words).

STEP-BY-STEP BUILD

1. Open claude.ai > Projects > New Project.
2. Name it: **After-Hours Response Agent**.

3. Paste into the Instructions field:

You are drafting a holding response for a real estate agent replying to an after-hours lead. First ask: is this a send-now or save-for-morning response? SEND-NOW: under 50 words, acknowledges the specific inquiry, sets a response-time expectation, asks one qualifying question. SAVE-FOR-MORNING: under 60 words, opens with "Good morning – I saw your message," asks two qualifying questions, offers a next step.

4. Press Enter twice. Paste the limits block:

Never suggest specific showing times without confirming availability. Never quote price or negotiate in a text draft. If asked about listing price, acknowledge and say the agent will share pricing details directly.

5. Go to Files > Add Files. Upload the After-Hours Response Templates PDF.

6. Add conversation starter: *Draft after-hours response*. Click Save.

DOWNLOAD

After-Hours Response Templates

10 sample drafts across 3 inquiry types and 2 timing modes.

LESSON 3.4 CHECKLIST

- My After-Hours Response Agent is live in my Claude sidebar.
- I have tested it with a property inquiry, a price question, and a vague general inquiry.
- I have tested both the send-now and save-for-morning modes.
- The price question test confirmed the agent did not quote a specific price.

MODULE 4

TEAM AND BROKER AGENTS

4 Lessons | 2 Agent Builds | Downloads: 4 tools

Module 4 is for team leads and brokers who want to deploy agents across their team. Individual agents should complete this module too – it teaches you the compliance and governance practices that protect your business.

LESSON 4.1

Sharing Agents Across Your Team

KEY CONCEPT

How to share a Claude Project with your team while maintaining the master version and keeping output consistent.

HOW SHARING WORKS

- Team members can use the agent and start conversations inside it.
- Team members cannot edit the instructions or replace knowledge files without your permission.
- When you update an instruction, the change is live for everyone immediately.
- You can see who is using the Project and when from the Conversations tab.

HOW TO SHARE A PROJECT

1. Open the Project in Claude.
2. Click the **Settings** tab in the Project panel.
3. Select **Specific People** under sharing options.
4. Type each team member's email and send the invitation.
5. Team members accept the invitation and the Project appears in their Claude sidebar.

DOWNLOAD

Team Rollout Checklist

8-step rollout plan mapped across 4 weeks. Complete before sharing any agent with your tea

LESSON 4.1 CHECKLIST

- I have shared at least one Module 2 or 3 agent with a team member.
- The team member confirmed the Project is visible in their Claude sidebar.
- I have downloaded and started filling in the Team Rollout Checklist.

LESSON 4.2

Build the Compliance Reviewer Agent

KEY CONCEPT

Reviews listing copy and marketing language for fair housing violations, MLS rule violations, and falsifiable claims before you publish.

STEP-BY-STEP BUILD

1. Open claude.ai > Projects > New Project.
2. Name it: **Compliance Reviewer Agent**.
3. Paste into the Instructions field:

```
You are a real estate compliance reviewer. Review every submission for three categories. FAIR HOUSING: scan for seven protected classes and proxy language. MLS RULES: check for contact info in public remarks, character limit over 800, showing instructions in wrong field. FALSIFIABLE CLAIMS: flag any superlative or ranking statement not supported by data. Output: PASS or FLAG. For each flag: ITEM | VIOLATION TYPE | RULE VIOLATED | SUGGESTED FIX.
```

4. Go to Files > Add Files. Upload: State Compliance Cheat Sheet, Banned Proxy Language List, and the Falsifiable Claims Examples PDF.
5. Add three conversation starters:

```
Review this listing description
```

```
Review this social media post
```

```
Review this email copy
```

6. Click Save. Share this agent with your full team immediately.

DOWNLOAD**Falsifiable Claims Examples**

40 claim types with compliant alternatives. Upload as knowledge file.

LESSON 4.2 CHECKLIST

- My Compliance Reviewer Agent is live and shared with my team.
- I have run three pieces of my own content through it — at least one should have been flagged.
- I have confirmed the agent outputs a structured FLAG report with violation type and suggested fix.
- This agent is now part of my pre-publish checklist.

LESSON 4.3

Build the Onboarding Q&A; Agent

KEY CONCEPT

Answers new agent questions from your brokerage's own documents. When a question is outside the materials, it escalates to a named contact rather than guessing.

STEP-BY-STEP BUILD

1. Open claude.ai > Projects > New Project.
2. Name it: **Onboarding Q&A Agent**.
3. Paste into the Instructions field:

```
You are an onboarding specialist for this brokerage. Answer new agent questions using only the brokerage documents provided. Do not draw on general knowledge unless directly supported by the documents. If a question is outside the materials say exactly: I do not have guidance on that in the current brokerage materials. Please contact [YOUR DESIGNATED CONTACT NAME] for this question.
```

4. **Replace [YOUR DESIGNATED CONTACT NAME] with the actual name before saving.**
5. Go to Files > Add Files. Upload your brokerage documents: playbook, contact directory, forms index, and MLS access guide.
6. Add three conversation starters and click Save. Share with every new agent on their first day.

How do I submit a lockbox code?

What is the escrow timeline for a standard sale?

Who do I contact for compliance questions?

DOWNLOAD**Onboarding Playbook Template**

20 new-agent questions pre-formatted. Fill in your brokerage's answers and upload as a kno

LESSON 4.3 CHECKLIST

- My Onboarding Q&A; Agent is live with at least one brokerage document uploaded.
- I have tested it with 5 real new-agent questions.
- At least one question triggered an escalation to the designated contact.
- I have shared the agent with my most recent new hire.

LESSON 4.4

Governance and Guardrails

KEY CONCEPT

Three governance principles that keep your agents running safely at scale.

THE THREE PRINCIPLES

- **ROLE-BASED ACCESS** — Define who can use, edit, and share each agent before you deploy it.
- **AUDIT TRAILS** — Review the Conversations tab on your highest-use agents monthly. 15 minutes. Catches drift before it becomes a problem.
- **KILL SWITCH** — If an agent misfires, remove sharing immediately, identify the failed instruction block, fix it, test it, then restore. Total time for a minor fix: under 2 hours.

YOUR ONE-PAGE GOVERNANCE POLICY MUST ANSWER FOUR QUESTIONS

- Who manages the agents?
- Who can edit the instructions?
- How often do we review the output?
- Who do we call when something goes wrong?

DOWNLOAD**Governance Template**

Four-question policy, access matrix, agent registry, and kill-switch protocol.

LESSON 4.4 CHECKLIST

- I have completed my one-page governance policy using the Governance Template.
- I have named the person responsible for managing each active agent.
- I have scheduled a monthly 15-minute output review for my highest-use agents.
- I know the four steps of the kill-switch protocol without looking them up.

MODULE 5

DEPLOY, MEASURE, AND KEEP GOING

4 Lessons | No new builds | Downloads: 4 tools

Module 5 is your operational playbook. Less building, more running. The goal is a sustainable system that improves over time.

LESSON 5.1

Your 30-Day Rollout Plan**KEY CONCEPT**

Roll out one agent at a time on a four-week cycle to build adoption without overwhelming your team.

THE FOUR-WEEK CYCLE

- **WEEK 1** – Write your governance policy, test the agent across 10 real scenarios, write the one-page agent guide, invite your first team member.
- **WEEK 2** – Share with the full team in voluntary mode, run a 30-minute demo session, open a feedback channel.
- **WEEK 3** – Update instructions based on team feedback, make the agent the standard starting point for this task.
- **WEEK 4** – Fill in the ROI Tracker, identify the most common edge case, fix it, decide which agent to add next.

KEY CONCEPT

Never roll out more than one agent at a time. Your team gets overwhelmed and nobody uses anything consistently. One agent per four-week cycle.

DOWNLOAD**Rollout Playbook**

Four-week Notion template with task checkboxes, owner assignments, and a feedback log.

LESSON 5.1 CHECKLIST

- I have named the first agent I will roll out and set a Week 1 deadline.
- I have named the rollout owner – the person responsible for managing the timeline.
- I have downloaded the Rollout Playbook and set it up for my first agent.

LESSON 5.2

Measuring ROI Per Agent

KEY CONCEPT

Three metrics that prove whether an agent is working — time saved, response speed, and conversion lift.

THE THREE METRICS

- **TIME SAVED** — Minutes per task before vs after. Multiply by weekly task volume. Convert to monthly hours and dollar value.
- **RESPONSE SPEED** — Average first contact time before vs after. Percentage of leads contacted within 4 hours before vs after.
- **CONVERSION LIFT** — Listing win rate, show-to-offer rate, or lead-to-showing rate before vs after.

CRITICAL RULE

Fill in the BEFORE column before you deploy. Without a baseline, you are estimating, not measuring.

DOWNLOAD**Per-Agent ROI Tracker**

Before/after columns for all three metrics across all agents. Summary tab shows total impact.

LESSON 5.2 CHECKLIST

- I have filled in the BEFORE column in the ROI Tracker for my first deployed agent.
- I have scheduled a 30-day check-in to fill in the AFTER column.

LESSON 5.3

The Monthly Tune-Up Routine

KEY CONCEPT

A 20-minute monthly routine that keeps every agent current as your voice, market, and rules change.

THE FIVE STEPS — RUN ONCE PER AGENT PER MONTH

1. Review 5–10 agent outputs from the Conversations tab. Look for format drift, tone drift, and compliance concerns.
2. Check for rule changes — MLS announcements, NAR updates, state commission guidance.
3. Update knowledge files if any rules changed.
4. Refresh conversation starters if usage patterns have shifted.
5. Test three new scenarios — one edge case from feedback, one current market scenario, one stretch scenario.

KEY CONCEPT

Set a recurring calendar block on the last Friday of every month. 20 minutes per agent. The agents that fall apart are the ones nobody tuned.

DOWNLOAD**Monthly Tune-Up Checklist**

Five steps, one checkbox each, space for notes. One copy per agent per month.

LESSON 5.3 CHECKLIST

- I have scheduled my first tune-up 30 days after my first agent deployment.
- I have downloaded the Tune-Up Checklist and added a recurring calendar reminder.

LESSON 5.4

When an Agent Misfires

KEY CONCEPT

Two misfire types and the four-step response protocol that stops the damage and fixes the problem.

TWO MISFIRE TYPES

- **HALLUCINATION** – Agent invented a fact not in the input. Cause: data intake block too loose or self-check block too vague.
- **GUARDRAIL FAILURE** – Agent produced language that violated a compliance rule. Cause: compliance block missing, too general, or the scenario fell outside what the block anticipated.

THE FOUR-STEP RESPONSE

1. **STOP DISTRIBUTION** – Remove sharing immediately. Document the exact output and input that caused the problem.
2. **IDENTIFY THE FAILED BLOCK** – Read the instruction blocks one by one. Find the one that should have caught this.
3. **FIX THE BLOCK** – Rewrite with more specific language. Test against the original scenario. Test against 4 more scenarios.
4. **RESTORE AND NOTIFY** – Restore sharing. Send the team a two-sentence update on what happened and what was fixed.

DOWNLOAD**Kill-Switch Protocol**

Four steps, two misfire categories, and an escalation decision tree for compliance violati

LESSON 5.4 CHECKLIST

- I know the two types of misfire and their different causes.

- I have downloaded the Kill-Switch Protocol and saved it somewhere my team can find it.
- I have shared the four-step response protocol with whoever manages the agents on my team.

MODULE

CAPSTONE — BUILD YOUR BRAND AGENT*1 Lesson | 1 Agent Build | Badge Submission*

The Brand Agent is your personal AI assistant — available 24 hours a day, answering buyer and seller questions in your voice, capturing leads while you are in a showing, at dinner, or asleep. This is the build that earns your badge.

WHAT THE BRAND AGENT DOES

- Answers the 20 most common buyer and seller questions in your voice.
- Describes your services factually without making legal promises.
- Ends every answer with one qualifying question to capture lead intent.
- Escalates complex transaction questions directly to you with your contact details.

SIX BUILD STEPS

1. Open claude.ai > Projects > New Project. Name it with YOUR name — **Ask [Your Name]** or **Work with [Your Name]**.
2. Paste all 6 instruction blocks from the Brand Agent Build Package into the Instructions field.
3. Upload your three knowledge files: your **Agent Bio**, your **Testimonials** (5–10 client quotes), and the **State Compliance Cheat Sheet**.
4. Add three conversation starters:

What is the market like right now?

How does the homebuying process work?

How do I know what my home is worth?

5. Test the agent against all 20 questions from the Build Package. Every answer should be in your voice and end with a qualifying question.
6. Submit two screenshots for your badge.

SCREENSHOT 1 — Your Brand Agent Project showing:	SCREENSHOT 2 — One completed conversation showing:
<ul style="list-style-type: none">• The Project name containing your name• At least one file visible in the Files section• The Instructions field open with at least 50 words of instruction text	<ul style="list-style-type: none">• A buyer or seller question typed by you• An agent response in your voice that addresses the question• A qualifying question at the end of the agent's response

Submit via the course platform. Badge issues immediately on automated pass. Manual review within 48 hours if needed.

DOWNLOAD**Brand Agent Build Package**

6 instruction blocks, bio template, and 20-question test list.

CAPSTONE CHECKLIST

- My Brand Agent is live with my name in the Project title.
- I have uploaded my bio, testimonials, and State Compliance Cheat Sheet as knowledge files.
- I have tested the agent against all 20 questions from the Build Package.
- Every answer ends with a qualifying question.
- I have submitted my two screenshots for badge review.
- I have shared my Brand Agent link in my email signature and website bio.

QUICK REFERENCE

All Downloads & Agents

All 20 Downloadable Tools

#	Tool Name	What It Is	Mod
1	Agent ROI Calculator	Google Sheet — 12 workflow rows, time-saved formula	M1
2	State Compliance Cheat Sheet	All 50 states MLS rules and fair housing deviations	M1
3	Banned Proxy Language List	38 phrases with protected class implications	M1
4	Starter Prompt Bank	12 starting instruction blocks, one per agent type	M1
5	12 Listing Instruction Blocks	Paste into Instructions field for Listing Description Agent	M2
6	Buyer Agreement FAQ List	50 questions with plain-English answers across 4 sections	M2
7	Project Setup Checklist	6-field checklist for every new Claude Project build	M2
8	CMA Narrative Instruction Blocks	6 blocks with sample data input format	M2
9	CMA Narrative Examples	3 sample narratives at 3 price points	M2
10	NAR Settlement Summary	1-page plain-English overview — upload as knowledge file	M2
11	Follow-Up Timing Chart	Optimal contact windows for 5 agent-buyer touchpoints	M3
12	Post-Showing Message Examples	6 sample messages, 2 per interest level	M3
13	Qualifying Question Bank	40 phrasings of the 4 qualifying questions	M3
14	After-Hours Response Templates	10 sample drafts across 3 inquiry types, 2 timing modes	M3
15	Team Rollout Checklist	8-step rollout plan mapped across 4 weeks	M4
16	Falsifiable Claims Examples	40 claim types with compliant alternatives	M4
17	Onboarding Playbook Template	20 new-agent questions pre-formatted for your answers	M4
18	Governance Template	Four-question policy, access matrix, agent registry	M4
19	ROI Tracker	Before/after measurement across 4 metrics and all agents	M5
20	Kill-Switch Protocol	4-step incident response with escalation decision tree	M5

All 7 Agents — Quick Reference

#	Agent Name	What It Produces	Built In
1	Listing Description Agent	MLS copy – HEADLINE, REMARKS, HIGHLIGHTS	Lesson 2.2
2	Buyer Agreement Explainer	Plain-English answers to buyer questions	Lesson 2.3
3	CMA Narrative Generator	One persuasive paragraph for listing presentations	Lesson 2.4
4	Post-Showing Follow-Up	Three drafts – WARM, NEUTRAL, COOL	Lesson 3.2
5	Lead Qualifier Agent	Heat score HOT/WARM/COLD + draft response	Lesson 3.3
6	After-Hours Response	Send-now or save-for-morning draft	Lesson 3.4
7	Brand Agent (Capstone)	Personal FAQ in your voice + qualifying question	Capstone

Congratulations on completing the Inman AI Agent Builder Certification.

Run the monthly tune-up. Add one new agent every four weeks. Measure what changes. The certification is the beginning.

inman.com