THE ULTIMATE REAL ESTATE PLAYBOOK: AI POWERED STRATEGIES

# Nexus Point: Harnessing AI for Success

## Integrating AI to Revolutionize Your Workflow

# Jake Woolsey

Real Broker

@jakesgotkeys

# At a GLANCE

At a Roadmap event in 2022, Jake Woolsey made the pivotal decision to shift towards AI. Using a custom AI bot to revolutionize his workflow, he's been able to rapidly accelerate his business while being fully present as the primary caregiver for his child.

**Portland, Oregon**
PRIMARY MARKET

**$700k**
AVERAGE PRICE POINT

**13**
YEARS IN REAL ESTATE

## 2023 PRODUCTION STATS

| 11 | $7,300,000 | $187,313 |
|---|---|---|
| TRANSACTIONS | SALES VOLUME | GCI |

**CORE CLIENTELE**

✓ **Transitional Sellers**

**PRODUCTION**

**35% | 65%**
Buyers | Sellers

**TEAM STRUCTURE**

✓ **2 agents**

Jake

# ON COACHING

My coaching experience with Tom Ferry has been transformative, largely thanks to my incredible coach, Emily. Emily has been instrumental in helping me stay organized and strategically attack my goals. Her guidance and support have provided me with the structure and motivation I needed to stay on track. With her expertise, I've been able to break down my objectives into manageable steps, maintain focus, and achieve milestones that once seemed out of reach. Additionally, the live events, the supportive ecosystem, and Tom Ferry himself have been a constant source of inspiration. These elements have fueled my passion and commitment, making my journey not only successful but also deeply fulfilling.

## BY THE NUMBERS

Every Quarter, using his custom chat bot, Jake chooses between the following:

**30** Unique Social Media Posts repeated **6** Times per Month

**60** Unique Social Media Posts repeated **3** Times per Month

**180** Unique Social Media Posts without repeating

This has led to:

**42**

Additional middle-of-the-funnel leads generated in just 12 months from a single social media source.

| Before AI Tools | After AI Tools |
| --- | --- |
| **21-30** social media posts per quarter (lacking SEO optimization) | **540** high quality social media posts per quarter including SEO optimization |
| **2-3** days between posts (sometimes forgetting to post all together) | **6** posts every day using Loomly |
| **9-12** hours per quarter writing copy and selecting pictures (not including time to post them to social media) | **3** hours per quarter to generate all the social media posts, select images, and schedule them for the rest of the quarter |

## THE STORY

At a bustling Nashville Roadmap event in 2022, Jake Woolsey sat among hundreds of real estate professionals, all eager to absorb the latest industry insights. However, it wasn't until Jason Pantana took the stage and decided to shift the conversation from social media strategies to the burgeoning potential of AI in real estate that Jake felt a seismic shift in his understanding. Overwhelmed with the possibilities, he skipped the subsequent sessions, rushing back to his hotel room. He needed to share this revelation with his wife; this wasn't just another business strategy—it was the future.

Jake's call with his wife turned into an all-night strategy session, brimming with excitement and plans. They discussed how AI could transform their real estate practices, making them more efficient and competitive. For Jake, who had always been brimming with ideas but struggled with execution, this was a game-changer. His mind raced with thoughts of automating mundane tasks, enhancing client interactions, and optimizing his online presence—all through AI.

As Jake delved into the world of artificial intelligence, he developed a custom AI bot that became the nexus of his entire operation. This pivotal moment marked more than just a technological upgrade; it revolutionized his career and life balance. The bot not only streamlined his workflows but also took over the heavy lifting of data analysis and client communication management. This automation freed Jake from the chains of routine tasks, allowing him to invest more deeply in the aspects of his job that required a personal touch.

Now, with the AI bot at the core of his business, Jake has transformed how he interacts with the market. He focuses on "2 for 1" deals, where his deep involvement can make a significant difference. These are not just transactions; they are life-changing interactions for his clients, facilitated by his ability to be fully present. Moreover, this technological empowerment has enabled Jake to be fully present as the primary caregiver for his child, never missing the fleeting, precious moments of family life.

## THE STORY

Thanks to that fateful day in the crowded Nashville conference room, Jake Woolsey has risen above the challenges of the competitive real estate market; he's thriving. His journey serves as a compelling testament to the transformative power of technology – which has not only enhanced his business efficiency but also enriched his personal life and strengthened client relationships. As Jake continues on this innovative path, the possibilities for his career and personal growth seem as expansive as his own ambitions.

# THE STRATEGY

### CHOOSE THE RIGHT AI PLATFORM

Start by selecting an AI platform that supports the creation of custom bots and content generation. Tools like OpenAI's ChatGPT, Google's Dialogflow, or Microsoft's Azure Bot Service offer robust features for developing AI bots tailored to specific needs.

### DEFINE YOUR SOCIAL MEDIA GOALS

Clarify what you want your social media presence to achieve. Are you looking to increase engagement, drive traffic to your website, or boost brand awareness? Your goals will dictate the content strategy your AI bot will follow.

- Increase Engagement: Focus on interactive content.
- Drive Website Traffic: Prioritize posts with effective calls-to-action.
- Boost Brand Awareness: Emphasize widespread content distribution.

### GATHER EXISTING CONTENT

Compile samples of your previous social media posts and any other relevant content you've created. This includes blog posts, newsletters, or any written material that reflects your unique voice and style. These documents will serve as training data for your AI.

- Collect Samples: Include blog posts, tweets, Facebook posts, and any promotional emails.
- Highlight Preferences: Mark content that particularly reflects your brand's voice and style, much like Jake did when fine-tuning his bot's outputs.

### TRAIN THE AI BOT

Use the gathered content to train your AI bot. This process involves feeding the AI examples of your writing style and content preferences. Most AI platforms provide a user-friendly interface for training your model. This crucial step involves personalizing the AI to your unique style, as Jake did after his initial setup:

- Input Data: Feed the AI with your collected content.
- Feedback Loops: Regularly assess the AI-generated content and provide feedback, refining its understanding of your preferences.
- Adjust Parameters: Tweak the training parameters based on the performance of the AI in capturing your voice.

# THE STRATEGY

### DEVELOP A CONTENT CALENDAR

Create a structure for your social media activity. Decide how often you want to post, what types of content you want to share, and the best times to publish. Input these details into the AI bot to help it generate a posting schedule.

- Frequency of Posts: Decide how often you want to post based on audience engagement times.
- Content Types: Schedule different types of posts (images, text, video) to keep the feed dynamic.
- Automation Tools: Use tools that allow the AI bot to schedule posts automatically, mimicking Jake's approach to maintaining an active online presence without constant manual input.

### AUTOMATE CONTENT CREATION

Instruct the AI bot to start generating social media posts based on the training you provided. Set guidelines for the topics, tone, and length of posts. Initially, review the content closely to ensure it aligns with your brand's voice and your personal style.

- Set Guidelines: Define clear rules about topics, tone, and format.
- Review Outputs: Initially, review and edit the AI-generated posts to ensure alignment with brand identity.

### MONITOR AND ADJUST

After deploying your AI bot, monitor its performance and the engagement levels of the posts it creates. Use analytics tools to see how well your content is performing and gather insights that could inform adjustments:

- Refine the AI's output by providing feedback on specific posts.
- Adjust the content calendar based on which types of posts perform best.
- Update your training data regularly to include new types of content or shifts in your communication style.

## THE STRATEGY

### CONTINUAL LEARNING

Periodically update the AI with new inputs to keep it current with changes in your content strategy and improvements in AI technology. This will help maintain the effectiveness of your social media strategy and ensure the AI evolves with your brand.

- Training Updates: Incorporate new content styles or strategic shifts.
- Technology Advancements: Stay updated on new AI capabilities and integrate them into your system.

Jake's 3 Action Items

# FOR SUCCESS

**1** Begin by automating simple, time-consuming tasks such as scheduling and client communications. This initial step helps you become comfortable with AI technologies and understand their potential impact on your workflow.

**2** Develop a custom AI bot that caters to the unique aspects of your business, just as Jake created a bot to manage his Google My Business profile. Tailoring AI tools to your specific requirements can significantly enhance their effectiveness.

**3** Regularly review the performance of your AI systems and make necessary adjustments. Feedback is crucial for refining AI operations to ensure they remain aligned with your business goals and adapt to changing market conditions.

# 6 Things Jake Will Do
# MOVING FORWARD

1. I would like to find a way to expand my custom GPT to help with my email newsletter. Similar to the GMB interview, but for email.
2. Move into creating an AI avatar and use AI tools for editing long and short-form social media content.
3. Experiment with uploading current reviews on my GMB page to the custom GPT for training purposes to give it context for what my clients say about me after the transaction.
4. Get better at prompting. The output you get from AI tools will only ever be as good as your prompts. This comes from research and practice.
5. Continue to expand my knowledge of AI tools- huzi.ai is next on my list to implement.
6. Work with my Tom Ferry coach to make these goals a reality!

# Jake's TOOLKIT

**FIND THE BELOW TOOLKIT ITEMS IN illūm**

## TOOLKIT: Top 5 Things To Consider When Choosing A Chat Bot

Thinking about automating your workflow with a chat bot? Use these pointers to get moving in the right direction.

## EXAMPLE: Jake's Generated Social Media Posts

See real-life examples of Jake's AI Generated marketing materials.

## EXAMPLE: Loomly Scheduling Website

See real-life examples of Loomly, the system Jake uses to schedule his social media posts.

## TOOLKIT: Jake's Chatbot "JakeAI.GMB"

Use the AI Chatbot already trained by Jake to expedite your social media post schedule.

**Link to Chatbot**

https://chatgpt.com/g/g-zfhWTkIw8-jakeai-gmb-bot

Jake's
# TOOLKIT

## Top 5 Things To Consider When Choosing A Chat Bot

When selecting a chatbot to automate your social media accounts, you should consider the following top 5 factors:

### 1. Integration with Social Media Platforms

Ensure the chatbot integrates seamlessly with the social media platforms you use most (Instagram, Facebook, Twitter, etc.). The chatbot should handle multi-channel automation efficiently.

### 2. Customization & Personalization

Choose a chatbot that allows you to customize the responses, so it feels like an extension of your brand. Personalization in conversations can lead to higher engagement and trust.

### 3. AI Learning & Adaptability

Opt for a bot with AI learning capabilities. The more the chatbot can learn from interactions, the more efficient and tailored its responses will become, improving customer service and lead nurturing over time.

### 4. User-Friendly Setup & Management

Ease of use is critical. The chatbot should have an intuitive interface for setting up, managing, and modifying tasks without requiring extensive technical expertise.

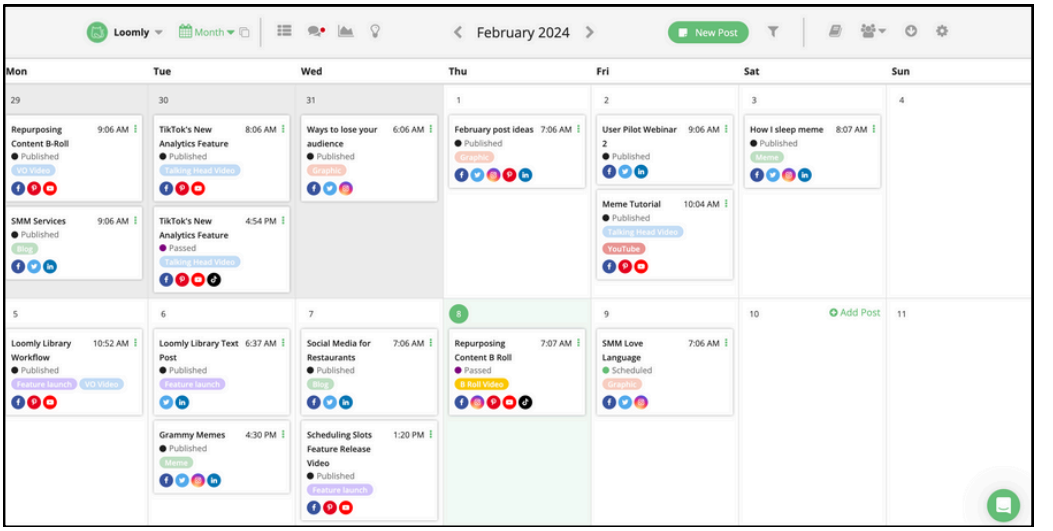
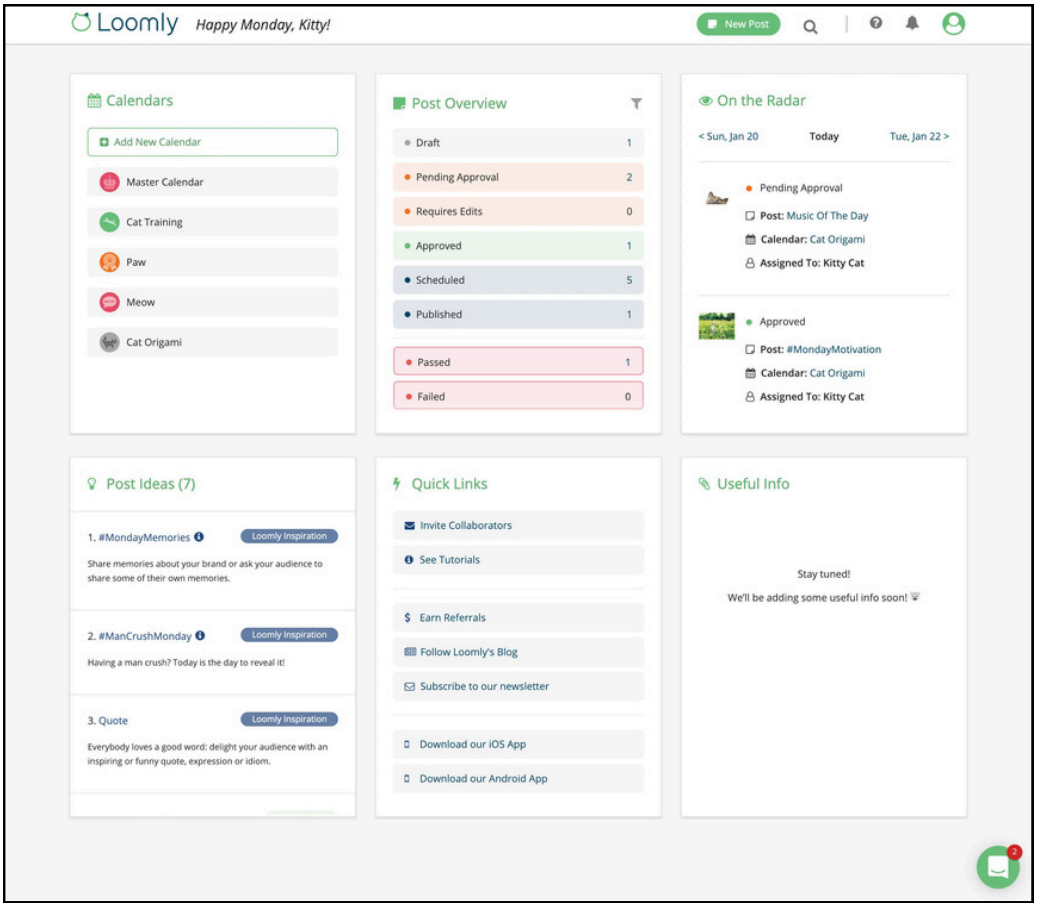
### 5. Cost & Scalability

Consider the cost of the chatbot service in relation to your budget. Ensure it's scalable as your business grows or if you need more advanced features in the future.

# Jake's TOOLKIT

## Examples of Jake's Generated Social Media Posts

Jake's

# TOOLKIT

## Examples of Loomly Scheduling Website