

Show, Speak, Send: Step-by-Step Setup Guide

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Talk into your phone at each showing, and get every word back later, filed under the right client. Setup takes about 20 minutes, and you don't need to be a prompt engineer.

What you'll have when you're done

- A private AI assistant on your phone that saves your showing notes by client and address, with a permanent record kept in your CRM or a simple spreadsheet.
- The ability to ask it questions later, like "What did David say about garages?" or "What did I promise Sarah and David?"
- An optional draft recap email you review and send yourself.

What you need: a smartphone, an AI chat app with a paid plan (I use Grok Bot; ChatGPT, Claude and Gemini also work), your CRM or a free Google Sheet, and about 20 minutes. Plans and features change, so check what your app offers before you sign up.

Step 1: Give your notes a home

Create one dedicated space in your AI app that does only this job. Every showing note goes there, so everything stays in one place and you can search it later.

- **ChatGPT:** create a new Project (or a custom GPT).
- **Claude:** create a new Project.
- **Gemini:** create a new Gem.
- **Grok:** create a new bot in Grok Bot. This is what I use.

Name it something you'll recognize at a glance, like **Show, Speak, Send** or **Showing Notes**. Keep it to this one job. Don't mix in your email or marketing work.

Then decide where your notes are kept for good. Think of the chat as your notepad and your CRM or spreadsheet as your filing cabinet. Nothing should live only in a chat.

- **Have a CRM?** That's your filing cabinet.

- **No CRM?** Create a Google Sheet called **Showing Notes** with these columns: Date, Client, Address, Notes, Promised to check, Done. Put your client list on a second tab. Use this one sheet for every client, for good. When a client comes back after six months, new notes simply become new rows, and everything is still searchable by name.

Step 2: Don't write the prompt. Let the AI write its own.

Are you a prompt engineer? Me neither. So skip that part. Tell the AI what you want in plain words, the way you'd brief a new assistant. Then ask it to write the prompt for you.

First, describe the job. Open a new chat in your space and say (or paste) something like this. Change anything that doesn't sound like you:

I'm a REALTOR®. At each showing I'll dictate a short note. Every note starts with my client's name, then the property address. File each note under the right client and home, and reply with one short line confirming it's saved. Later I'll ask questions like what a client said about something, what I promised to check, or which clients asked about a topic. Answer only from my notes, and include the date. Never guess or fill in gaps. If something might be a problem, say "needs checking." If I ask, draft a short, warm recap email for my clients. When I say "file today's notes," give me today's notes as rows for my spreadsheet or CRM: date, client, address, notes, and what I promised to check. Never send anything or book anything. I review and approve everything.

Then ask the magic question:

Write me a detailed prompt that does this.

The AI will hand you back a longer, more organized version of your instructions. It will usually add things you didn't think of, like how to handle a note with no client name. Read it through. If something's off, just say so in plain words ("make the replies shorter") and ask it to rewrite the prompt.

Step 3: Save it as standing instructions

Once you like the prompt the AI wrote, copy it and paste it into your space's instructions. Then it applies to every note and every question, every time, without retyping.

- **ChatGPT:** the Project's instructions (or the custom GPT's instructions box).
- **Claude:** the Project's instructions.

- **Gemini:** the Gem's instructions.
- **Grok:** the bot's instructions, or ask it to remember the job.

Say it once. It's ready after every tour.

Step 4: Do a five-minute practice run

Before your next real tour, test it at your kitchen table with made-up clients. Send these three notes, one at a time:

Sarah and David, 142 Salt Meadow. Sarah loves the kitchen. David's not thrilled there's no garage. I promised to find out if the tenants are staying.

Sarah and David, 352 Kestrelwood. Construction next door, I'll check the permit. David wants to measure the garage.

The Nguyens, 27 Harbour View. Linh loved the light. Tom wants to know the strata fees.

Then ask: "What did I promise Sarah and David?" and "Which of my buyers asked about strata fees?"

Then say "File today's notes" and check that the rows landed in your Showing Notes sheet. If the answers and rows come back right, you're set. If not, tell it what was wrong in plain words, and ask it to update its instructions. Then delete the practice notes and rows so they don't mix with real clients.

Step 5: At the showing, just talk

Before you get back in the car, open your space, tap the microphone, and say what matters. Twenty seconds per house is plenty.

The one habit: start every note with the client's name, then the address. That's how everything stays connected to the right people.

What to say:

- **Who liked what.** "Sarah loves the kitchen."
- **Who didn't, and any disagreement.** "David loves the garage, Sarah thinks the kitchen needs work."
- **Their own words when they're telling.** "Sarah walked in and said, 'Oh, this is lovely.'"
- **Anything you promised to check.** "I'll find out about the permit."

- **Rankings, if they share them.** "Kestrelwood's now their favourite."

You don't need the price, beds or baths. Your clients already know those. Notes are for what people said and felt. Typing works too, if you're somewhere you can't talk.

At the end of the day, file it. Say "File today's notes." It adds them as new rows in your Showing Notes sheet, or to your CRM. (If your app can't connect, ask for the rows and paste them in.)

Step 6: Get it back whenever you need it

This is the payoff. Ask in plain English, any time, in the same space.

When	Ask
That night	"What did Sarah and David think of today's homes?"
Before you follow up	"What did I promise Sarah and David?"
When a client calls	"What did David say about garages?"
Across all your buyers	"Which of my buyers asked about strata fees?"
Before writing an offer	"Remind me everything Sarah and David were worried about."
Planning a second showing	"Which homes did they want to see again, and why?"

Because everything lives in one sheet or your CRM, this still works when a client comes back six months later. Ask "Pull up everything on Sarah and David" and their whole history comes back. The answers come only from your notes, with dates. If something isn't in your notes, it should say so rather than guess.

Step 7 (optional): Send a recap tonight

Want to impress your buyers before they're home? Ask:

Draft a short, warm recap email for Sarah and David about today's homes. End with one question: which homes would you like to see again?

You'll get a draft covering what they loved, what gave them pause, and what you're checking. Read it, fix anything that's off, then copy it into your email and send it yourself.

Your name is on it, so nothing goes out until you say so. The assistant drafts. You approve.

Where your notes are kept for good

Every setup saves your notes to a spreadsheet or your CRM, so nothing depends on chat history. Pick the level that matches what you use today.

Level	What you do	What you get
Spreadsheet	Connect your AI app to one Google Sheet for your notes and client list. At the end of each day, say "File today's notes."	A permanent, searchable record you own. It works on day one, with no CRM.
CRM	Connect your AI app to the CRM you already use. If your CRM supports it, we can connect it.	"Sarah and David" means <i>your</i> Sarah and David, and every showing note lands in their CRM file.
Fully connected	Add your email and cloud storage, such as Google Drive or Dropbox, on top of your sheet or CRM.	Recap drafts wait in your email for you to review, and a copy of your notes is saved to your own files.

Keep your client list current. The assistant only knows what you've given it.

Want help with your CRM or a full setup? If your CRM supports it, we can connect it. Setting that up is exactly what AI Professor does.

Privacy and consent

- **Ask first.** If you're recording what your clients actually say, ask: "Mind if I save a quick note so I don't miss anything?"
- **Keep notes about the homes and their reactions.** Leave out finances, personal details, and anything about the sellers you wouldn't want read back to you.
- **Know where your notes live.** They're stored in your AI account and in your spreadsheet or CRM. Check your app's privacy settings, and turn off model training on your data if the option exists.
- **Check your rules.** Review your brokerage policy and your provincial privacy rules before you start.

This is general guidance, not legal advice.

If something's not right

Problem	Fix
A note got filed under the wrong client	You probably skipped the name at the start. Say "That last note was for the Nguyens" and it will correct it.
Answers include things you never said	Remind it: "Only answer from my notes." Then ask it to add that rule to its instructions.
Replies are too long in the driveway	Say "Keep confirmations to one line" and ask it to update its instructions.
It can't find an older note	Ask with the client's name and the address, or the approximate date.
You want to change how it works	Describe the change in plain words, then ask again: "Write me a detailed prompt that does this."

Next steps

Try it on your very next tour. Then join me live at **The REALTOR® Desk**, Tuesdays at noon Pacific. The full schedule is at aiprof.ca/seminars.

Want help connecting Google Sheets, your email, cloud storage or your CRM? If your CRM supports it, we can connect it. Book a free fit call at aiprof.ca.

AI Professor. Make AI useful.

Take the Show, Speak, Send Scorecard. A free 2-minute check: 10 yes/no questions about your buyer-tour follow-up, with a score out of 100 and the one thing to fix first.
aiprof.ca/scorecards/showspeaksend/