



⚡ Premium Action Guide

AI for Real Estate Agents: Leads, Follow-Up, and Marketing on Autopilot

Build an end-to-end AI system to capture, qualify, and nurture real estate leads, plus a content engine that grows your local authority — without coding.

📌 **Updated for 2026** 📊 **5–10%** Cold outreach reply-rate 'golden zone' (source-reported)

📢 @jobhacki · JobHacki Community



Start Fast

Clear first steps you can take this week.



Real Sources

Built from people who actually did it.



Honest Numbers

Source-reported pay, costs, and risks.

Get the Full Guide Vault →

🔒 Includes checklists, scripts & source-backed insights

YOU WILL LEARN

✓ What you'll build

✓ Step 1 — 🕒 Choose your AI strategy

✓ Step 3 — 🌐 Capture inbound leads on your site

✓ Platforms & tools

✓ Step 2 — 📁 Model your data in Sheets

✓ Step 4 — 📞 Stand up your AI phone agent

► MODULE 01

What you'll build

A practical AI stack that captures website and phone leads, follows up instantly by voice and SMS, books appointments, and logs everything to your CRM or Google Sheets. You'll also stand up a content engine to publish local market updates, listing promos, and short posts that position you as the trusted agent in your farm.

Pick your preferred automation/agent platform and plug in supporting tools only where they add value. Then price, pitch, and scale with deliverable-based retainers.

1 AI receptionist that calls/texts back missed inquiries

2 Lead capture form → qualify → route → book

3 Content pipeline: newsletter, LinkedIn, short posts

4 Dashboards in Google Sheets for tracking & QA

5 Pricing, outreach, and onboarding playbooks

► MODULE 02

Platforms & tools

Automation

1 free · 3 paid

 Make.com •

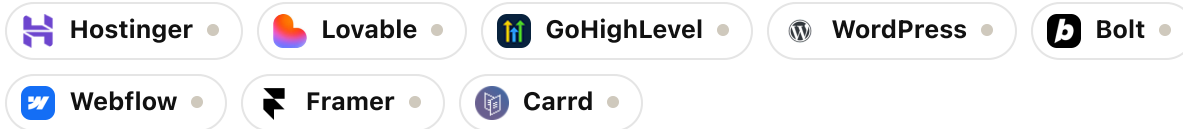
 n8n •

 Zapier •

 Apify •

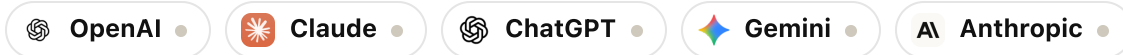
Website Builders

0 free · 8 paid



AI Models

0 free · 5 paid



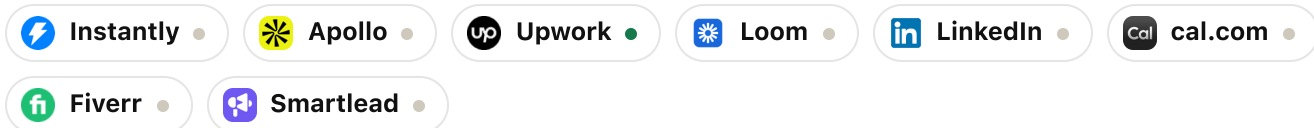
Dev & Hosting

0 free · 6 paid



Lead & Outreach

1 free · 7 paid



► MODULE 03

Step 1 — Choose your AI strategy

Pick the right build for your goal. If you need control and clarity, start simple; add autonomy later.

Decision tree: if you must be in the loop, build a Custom GPT; if steps are 100% logic-based, build a workflow; if the order is fixed but needs AI choices, build an AI workflow; if you want autonomy and flexibility, build an AI agent.

Tip

Start hyper-niched: an AI receptionist for missed calls in real estate outperforms general 'AI automation for everyone'. Most client wins come from Level 2 (integrations like Zapier/Make) before complex Level 3 builds.

Step 2 — Model your data in Sheets

Create one Google Sheet per job: Leads, Content, and Video Analytics. Keep Sheets your single source of truth; tools just read/write here.

Leads (tab: Leads): id, source, first_name, last_name, phone_e164, email, inquiry_text, property_address, tags, stage, agent_owner, last_touch_at, next_action_at, notes.

Content (tab: source_posts): post_id, url, content, author_linkedin_url, posted_date, image_url_1..3. Content (tab: destination_posts): generated_content, original_post_url, original_linkedin_url, generated_date, post_status.

Video Analytics (tab: yt_videos): ID, published_at, title, views, likes, comments, favorites, description, tags, duration, definition, small_thumb, medium_thumb, large_thumb, standard_thumb, channel_id, channel_title, embed_html.

Tip

For quick UI editing, Sheets beats most in-app data tables. For tiny writes (≤ 60 rows), n8n data tables are fast; for ~ 400 -row writes, speed is comparable.

Step 3 — Capture inbound leads on your site

Add a contact form to your website and pipe submissions to your automation webhook.

Example (WordPress + Elementor): drag an HTML widget, paste your form HTML, switch your workflow to the production URL in n8n/Make, copy the webhook URL, replace it in your form action, and publish.

Optionally embed a chat widget via a CDN snippet; works on WordPress, Webflow, Wix, Squarespace, or custom sites.

Tip

Place multiple contact methods above the fold: click-to-call, email, short form, chat, social links, and office address to build trust.

► MODULE 06

Step 4 — Stand up your AI phone agent

Name the agent and set its role: "You are a lead follow-up agent for my real estate property company. When a new lead comes in, send a personalized follow-up automatically."

Get a phone number for your agent (select provider, save, complete identity verification).

Configure call settings: disable voicemail and keypad detection if unused; end call on silence at 30–60s; set max call duration (e.g., 12–20m); ring 30s.

Add functions: end_call and call_transfer with destination numbers; add a knowledge base (upload website or sitemap). Use a dynamic time variable like

{{current_time_America/Toronto}} in the prompt to prevent outdated dates. Make transfer a global node so the agent can transfer from any point.

Tip

Always include an explicit end_call instruction—some voice agents won't hang up on their own. Set transfer_failed handling to notify a human.

► MODULE 07

Step 5 — Send pre-call SMS and connect the agent

Send a heads-up SMS before dialing. Example message expression: "Hi, [FIRST_NAME]. I'm [AGENT_NAME], an AI assistant with [BROKERAGE]. I'll call in ~10 minutes to discuss

[INQUIRY_SHORT]. Looking forward!"

Connect the voice agent to your workflow via HTTP. Configure JSON body: from (your Twilio/agent number), to (dynamic +1[phone]), callType: phone, agentId, and dynamic variables like first_name, job_title (use 'Buyer/Seller/Investor'), inquiry_text, and property_address.

If you use a webhook trigger, set a Respond to Webhook node to return JSON containing the dynamic variables for debugging. Hook transfer_failed to email the intended recipient (and optionally the lead) via your automation platform.

Tip

Map all dynamic variables—if a placeholder isn't populated, some agents will literally speak it ("am I speaking with user first_name?").

► MODULE 08

Step 6 — Build the capture → qualify → CRM workflow

This is your backbone: webhook/form → enrich → AI qualify → SMS/call → Sheet/CRM → alerts. Use your preferred primary platform below; steps differ slightly per tool.

Platform	What to do in this step
Make.com	Webhook trigger → parse form → OpenAI (JSON output) to extract: intent, urgency, budget, location, timeline → Iterator for multi-results when scraping → Router to branch (buyer/seller/investor) → Add Row to Google Sheets → Gmail to lead + Slack to team → Optional: Apify actor run for comps or page scrape → OAuth 2.0 module where needed.

Platform	What to do in this step
n8n	Webhook → HTTP Request to voice agent (if calling) → OpenAI node to summarize and score lead → If Yes, Delay (sleep) and then Gmail → Google Sheets 'Append' → Respond to Webhook with JSON → Optional: Apify node for data → Cloudinary node for media uploads.
Zapier	Webhooks by Zapier (Catch Hook) → Formatter (text/date) → OpenAI (structured JSON) → Filter by urgency/stage → Google Sheets: Create Row → Gmail: Send → Slack: Post message.
Lindy	Create AISDR flow: find/enrich lead → qualify via agent → compose personalized email/SMS → log to Sheets → handoff to Calendar for booking → AB test messages and record results.
ChatGPT (Custom GPTs)	Create a GPT to classify and summarize leads; instruct it to output strict JSON with keys matching your Sheet columns. Export JSON and hand off to Make/Zapier for actions.
Claude (Projects/Code)	Use Claude Code to scaffold a small Node/Python service that receives webhooks, calls APIs, and writes to Sheets; manage MCP servers/skills; enable /loop to keep tasks updated.

Tip

In Make, the gray iterator–aggregator zone is isolated—modules outside can't see inner variables except the aggregator output.

► MODULE 09

Step 7 — Authorize APIs, keys, and hosting

OpenAI: create a new API key and paste it into your platform's OpenAI module.

Google: in Google Cloud Console, create a project, enable Gmail/Sheets/Drive/YouTube Data v3 as needed, configure OAuth consent (External if required), then create OAuth Client (Web). Add your platform's redirect URI, copy client_id/secret into your platform credentials.

Gmail: create credentials for a Web application; add instance URL; paste client_id/secret into your automation platform.

YouTube: create OAuth 2.0 client with your platform's redirect; enable API; use for channel/video pulls.

Apify: sign up, get API key (Settings → API & Integrations), add to platform.

Cloudinary: copy cloud name; create unsigned upload preset; enter into node.

Make's generic OAuth 2.0: register your app with provider; set authorization/token URIs; set redirect to Make's OAuth redirect URL.

Optional hosting: one-click host n8n on Webspaces Kit for low-cost, unlimited executions.

Tip

Google shows an unverified app warning during OAuth. Click Advanced and continue if it's your own project.

► MODULE 10

Step 8 — Qualify and enrich leads automatically

Enrich: pull company or owner data from Apollo; scrape listing or profile pages with Apify actors (dynamic rendering).

Qualify: run an AI node that outputs structured JSON fields (intent, urgency, budget, area, timeline, notes). Use a schema/structured parser to avoid free-form.

Route: add a rule set to branch flows. Example: if 'type=buyer' and 'timeline≤30 days', send to high-priority SMS → call; else nurture by email.

Pacing: insert Delay (sleep) modules for realistic cadences (e.g., wait 4 minutes before thank-you; 3 more before next steps).

Tip

Avoid scraping LinkedIn or user-generated platforms directly—anti-scraping is sophisticated. Prefer APIs, enrichers, or actors designed for this.

► **MODULE 11**

Step 9 — Launch omnichannel outbound

Build a targeted list (sellers, buyers, investors, landlords). Use Apollo, niche communities, comments, or followers of local creators. For social profiles missing, Google "[first name] [last name] [company] Twitter".

Run Instantly campaigns and mirror the same asset via Omni Channel: email, LinkedIn DM, Instagram DM, X message. Offer a free audit or one-time asset; then upsell to a retainer.

Measure per channel: open, reply, click, booked calls, CPL, CPA, proposals sent/accepted, closed deals, traffic, inbound leads.

Tip

Benchmarks: under 2% reply is poor; 2–5% needs work; 5–10% is strong; 10%+ is excellent (source-reported).

► **MODULE 12**

Step 10 — Templates — outreach & follow-ups

COLD EMAIL — MISSED-CALL FIX

Subject: Quick win for [CITY] leads you're missing

Hey [FIRST_NAME],

I noticed you might be missing leads after-hours and weekends (no one answers, no instant callback). I help real estate teams automate lead follow-up with an AI receptionist that calls/texts back in minutes and books appointments on your calendar.

Worth a 10-minute look?

— [YOUR_NAME]

COLD DM — AI EMPLOYEE TEASER

Subject: [Personalized hook for [Name]]

Hey [FIRST_NAME] — I built you an AI employee that can book you 4–5 new appointments in the next few days. Want to try it risk-free?

COLD EMAIL – GENERIC VALUE (VERBATIM ADAPTED)

Subject: Hey [NAME] I think I have something for you regarding [UNIQUE THING]

Hi [FIRST_NAME],

I know you're [ICEBREAKER] so I figured it made sense to chat.

The TLDDR, I think I can add 5K a month to your [ELEVATOR_PITCH] with a few automated systems.

I just did this for a very similar industry company and we had 28,350 in a few months. They do related things. So I'm very confident I can duplicate this at minimum. Would be 100% risk-free. I guarantee at least 20 appointments booked or you wouldn't have to pay.

P.S. [POSTSCRIPT]

FOLLOW-UP – BOOKED CALL

Subject: Thanks – next steps

Hey [NAME], thanks for booking a call – that request looks exciting. I'm out of the office right now but I'll review everything as soon as I'm back and send a follow-up with thoughts. Looking forward to learning more about what you're aiming to achieve. Cheers,

FOLLOW-UP – CIRCLING BACK

Subject: Circling back

Hey [NAME], circling back – this all looks great. There may be a couple of gotchas depending on specifics but I don't think they'll be a big issue. [PARTNER_NAME] will scope this, check if others should join, and confirm fit. I'll then record a private video going over last details; once you confirm we can kick things off.

Step 11 — Build your local content engine

Source: scrape or collect posts/news into Content 'source_posts' (Apify actors; newsletters; Reddit threads). Filter with an AI relevance check (newsworthiness; exclude personal/questions/image-only).

Create: use GPT to produce LinkedIn posts (laconic, emojis sparingly), turn transcripts into blog posts (markdown ATX), and draft a weekly newsletter with a creative title and 3–5 topics.

Log: append generated items with metadata into 'destination_posts' (content, original URLs, generated date, status). Randomly (25%) send a section back to GPT to add bullets/subheads for variety.

Distribute: in Make, after WordPress publish, branch to cross-post on LinkedIn/X/Instagram/Medium; or use Botato for multi-platform posting. Use Cloudinary for image hosting. Filter YouTube Shorts by duration string length.

Tip

Clients don't care about meta tags or prompt minutiae—ship visible deliverables: emails, posts, calendars, calls, reports, and configured assets.

Step 12 — Templates — content & newsletter

SYSTEM — NEWSLETTER PLANNER

You are an expert newsletter planner for a real estate audience. You'll receive 3 articles from the past week. Create a creative, fun title plus the main topics and 1-sentence insights for each. Keep it concise and actionable for [CITY/NEIGHBORHOOD] homeowners and buyers.

USER – LINKEDIN POSTS FROM TRANSCRIPT

Convert this real estate transcript into at least five LinkedIn posts in a spartan, laconic tone. Separate posts with vertical pipes (|). Use emojis sparingly. Write like a top-tier content marketer. [PASTE TRANSCRIPT]

SYSTEM+USER – BLOG FROM TRANSCRIPT

System: You are a helpful writing assistant.

User: Convert the following transcript into a comprehensive blog post in markdown ATX format. Tone: casual Spartan, clear subheads, short paragraphs. [PASTE TRANSCRIPT]

SYSTEM – COMPETITOR RESEARCH VIA PERPLEXITY

You are an expert research agent. You will be given the name of a competitor and a user question. Use the Perplexity tool to research them and summarize what they've been up to, with citations.

USER – TREND RESEARCH ASSISTANT

You are a trend research assistant for approachable real estate content. When I ask for ideas, search the web for the top three trending, novel, and approachable local real estate ideas or homeowner tips. For each topic, write a one-sentence summary and suggest one content angle I could post today. Return a clean numbered list.

PROMPT – SELLER PITCH DECK (SLIDES)

Create a 5–10 slide seller pitch deck showing specific problems with [PROPERTY/ONLINE PRESENCE] and how our AI follow-up and marketing services could increase showings and inquiries by [X–Y% example-only]. Put pain points on each slide and solutions near the end.

Step 13 — Automate listing media (images + video)

Image upgrades (OpenAI gpt-image-1 edit): set model gpt-image-1; input the original listing photo as binary; prompt to stick closely to the source (no hallucinated features); size 1024×1024. Replace example text with a custom edit prompt like “Transform this exterior into a high-quality twilight-style MLS-compliant photo.” Use the image edit endpoint to preserve property realism.

Trim JSON for avatar/video APIs: keep only necessary fields (dimensions, character/avatar_id, voice type/id, input text). Remove matting/captions/background/callback to reduce errors.

Add motion graphics to reels: prompt your editor agent to scan the transcript and overlay engaging, minimal motion elements. Example: “Now that the video is trimmed, add motion graphics using Hyperframes based on the transcript; keep it clean and on-brand.”

Video data hygiene: when pulling channel data, filter out Shorts by checking duration string length; upload thumbs and assets to Cloudinary; keep a Video Analytics tab updated.

Tip

If you skip the image edit endpoint, generations won’t resemble the source. For models that reject realistic humans, swap to alternatives as needed.

Step 14 — Research comps, neighborhoods, and rivals

Spin up a research workflow: ask your agent to compare neighborhoods, HOAs, school zones, price per sq ft, and days-on-market. Use Perplexity for web answers and cite sources.

Test multi-agent research in your main workflow chat by asking: "Compare [AREA] vs [AREA] for first-time buyers," or "Give an overview of [BUILDER/COMPANY], reviews, and social presence."

Optionally run Claude Code to ask clarifying questions (tone, post types, visuals per platform, publishing flow) before auto-creating posts or reports.

Tip

If you restrict web search to a domain without the answer, the model should say it can't find it there—don't force it.

► **MODULE 17**

Step 15 — **Scheduling and drip sequences**

Auto-invite qualified leads to book: in Make, trigger on webhook or ClickUp task; send a Gmail invite with your Cal.com link. Use a templated scheduling prompt to generate subject/body.

Add pacing and dates: use add seconds/minutes/hours/days/months/years functions to set next_action_at; compute days since last_touch_at by $(\text{now} - \text{last_touch_at})/86400000$; use ceiling to round up; branch cadence logic accordingly.

If using WhatsApp, note: one credential is needed for the trigger (client_id/secret) and a separate one for sending (access token/business account id).

Subject: Schedule a quick call

Hi [FIRST_NAME],

Thanks for your inquiry about [PROPERTY/GOAL]. Here's my calendar: [CAL_LINK].
Pick whatever works and I'll prepare options for you. If you prefer SMS, reply [YES] and we'll text.

— [YOUR_NAME]

► MODULE 18

Step 16 — Test, monitor, and debug

Dry-run the full pipeline: capture → enrich → AI qualify → SMS/voice → Sheets/CRM → alerts.
Verify data types, nulls, and JSON structures. Confirm Sheets appends and status changes.

Slack setup: event subscription verification needs your webhook to echo the challenge—
execute the Slack trigger once to activate.

If you build a small app UI, have your webhook respond with the automation output so the UI
can display live results. Log all errors with timestamps in a 'Logs' tab.

Tip

n8n can show intermittent 'expression evaluated to falsy' or 'destination node not found'—retry or refresh the workflow. Keep tests short and isolated.

► MODULE 19

Step 17 — Track performance and show value

Track per-channel metrics: open, reply, booked calls, CPL, CTR, conversion, CPA, proposals, closes, engagement, site traffic, inbound leads. Build a simple dashboard in Sheets.

Use missed-call math to anchor value in discovery: e.g., Spa 20 calls/day, 12 missed → ~\$65,700 yearly lost; Dental 50 calls/day, 31 missed → ~\$226,300 yearly lost (source-reported). Real estate teams often have similar waste in off-hours inquiries.

Report weekly with a one-page snapshot: new leads, contacts made, appointments, pipeline value, and highlights.

Tip

Lead gen solves downstream problems—once you pick better projects, pricing and system complexity get easier.

► MODULE 20

Step 18 — Package, price, and sell

Offer deliverable-based retainers: weekly strategy, priority plans, daily availability, training, and unlimited maintenance (reasonable use). Layer in missed-call text back, reactivation SMS/email, Google Business Profile cleanup, simple site, and AI chat widget.

Pricing options (example-only): Basic AI site + automation \$500/mo; Lead gen + ads \$1,500–\$2,000/mo; Full suite incl. Google Ads & SEO \$2,500–\$3,000/mo. One-time setups often \$300–\$5,000 + \$2–\$700/mo ongoing (source-reported).

Sales calls: 70% discovery (problems/goals), 20% outcomes-backed solution, 10% objections/next steps. Onboarding: thank them, set meeting cadence, timelines, comms, platform logins/2FA, Q&A.

Close sequence: project first → retainer upsell converts better than cold-to-retainer alone. Use cost-savings pricing where appropriate (aim for ~25–50% of verified savings, source-

reported).

Tip

Don't drown them in SEO tags or prompt theory. Speak outcomes: speed-to-lead, booked showings, response rates, and revenue at risk.

► **MODULE 21**

Step 19 — **Security, compliance, and reliability**

Reduce risk: template most text; let AI fill small fields—keeps outputs predictable. Add guardrails; on fail, notify Slack and stop or reroute.

MCP/agent tool access can be over-scoped; prefer least-privilege and role-based control. Keep secrets in vaults; audit logs regularly.

Human-in-the-loop: run in plan mode first (agent drafts plan and clarifying questions); flip to bypass/auto-execute only after passing checks. Keep a manual override channel.

Model choice: Claude often excels at complex coding/agent tasks; OpenAI at user-facing chat; Gemini is a cost-effective all-rounder with large context (about one million tokens). Mix models per subtask for cost/perf.

Tip

Avoid hardcoding secrets. If you must for a quick POC, document and rotate them—then migrate to environment variables or a secret manager.

► **MODULE 22**

Step 20 — Scale with agentic fulfillment

Automate fulfillment beyond lead gen: proposal gen, onboarding, lead scraping, enrichment, campaign gen, and auto-replies. Treat agents like team members you oversee, not tasks you micromanage.

Use different chat models per agent to balance cost and performance (e.g., fast/cheap for drafts, higher-quality for final summaries). Use plan mode to get a clear work plan before enabling autonomy.

For acquisition, start with your network: find a time-waster problem, build a quick POC without asking, then show it. If you freelance, keep an optimized profile, variable rates, keyword-rich titles, proof above the fold, and apply daily with custom Looms.

Tip

Clients expect more communication than they receive. Over-communicate progress to retain and upsell.

► MODULE 23

Mistakes to avoid



UNMAPPED PLACEHOLDERS

If you don't pass dynamic variables, the agent may literally read placeholders (e.g., "user first_name").



NO EXPLICIT END_CALL

Some voice agents won't hang up; include an end_call instruction and transfer_failed fallback.



WRONG RECORD UPDATES

Filter Sheets by the incoming phone/email; otherwise the agent may grab every row and misroute.



SLACK WEBHOOK NOT VERIFIED

Event subscription fails if your endpoint doesn't echo the challenge; execute the trigger step first.



OVERBUILDING

Complex multi-agent chains can underperform simpler flows. Ship visible wins first.



SCRAPING PITFALLS

LinkedIn and UGC platforms block scrapers. Use approved APIs, enrichers, or capable actors.



BASE MODEL DEFAULTS

Picking a generic/cheapest GPT-4 variant can reduce quality—select a specific model intentionally.



SALES > TECH

Spending months perfecting automations but neglecting discovery and communication kills deals.



NO PACING

Blasting all messages at once feels robotic. Use delay functions and date math for drip timing.



GEMINI TOOL-CALLING MISMATCH

Without thought signatures, Gemini 3 Pro tool calls can error in n8n—use HTTP or alternate models.

► MODULE 24

Income Forecast

\$500–\$5,000/mo

Typical SMB AI automation retainer ranges (source-reported/example-only)

\$300–\$5,000

Common one-time setup per client (source-reported/example-only)

\$2–\$700/mo

Ongoing software/ops fee add-on (source-reported/example-only)

\$500/mo

Basic AI site + automation tier (source-reported/example-only)

\$1,500–\$2,000/mo

Lead gen + ads tier (source-reported/example-only)

\$2,500–\$3,000/mo

Full suite incl. Google Ads & SEO (source-reported/example-only)

\$25,000/mo

Five clients at \$50k/yr + \$50k one-time projects (annualized) (source-reported/example-only)

► **MODULE 25**

Resources

RESOURCES



National Association of Realtors (NAR)

Industry stats, reports, and guidance ↗



U.S. Department of Housing and Urban Development (HUD)

Housing policy and programs ↗



Fannie Mae Research & Insights

Housing market research ↗



Freddie Mac Research

Housing and mortgage insights ↗



U.S. Census Bureau — QuickFacts

Local demographic data for farming ↗

 **BLS — Real Estate Brokers and Sales Agents**

Occupation outlook & pay data 

 **Zillow Research**

Home value indices and trends 

 **Redfin Data Center**

Housing market data and charts 

 **Slack API — Events API**

Challenge verification reference for webhooks 

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This guide is 1% of what members get

Get access to thousands of tools, resources, playbooks, guides, and more.

Land your dream job. Start your dream business.



OmniCut

Any video → a timestamped, cut-by-cut edit blueprint.



OmniScript

Turn any idea into a viral-ready script with hooks.



Resume Builder

Recruiter-tested one-page resume, auto-built from your LinkedIn.



Job Readiness Simulator

Paste a job link — get tested + your fastest study path.



Tool Directory

Every AI tool that makes money, organized + searchable.



Job Directory

Tens of thousands of live jobs across 12+ ATS systems.



Playbook Directory

100+ grounded, step-by-step income playbooks.

Access 100+ playbooks free — create your account

Get All-Access

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