The 40-Minute Staff AI Audit

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Why I ran this

I put my whole staff in one Zoom room. VAs. Stateside people. Everybody.

I asked one question: what do you do on a computer all day?

Forty minutes later, I knew too much of my team was doing basic work by hand. Copying, pasting, exporting, uploading, rewriting the same emails. When I asked what AI they used, the answer was the same one I hear everywhere: ChatGPT for emails and listing descriptions. That's it.

That was on me. I'd never asked.

So I took the recording, dropped it into Claude, and built them tools. In the first four weeks, my staff messaged it 84 times across 36 conversations.

This is the whole process, in five steps. You can run Step 1 this week.

Step 1: The meeting

One call. Everyone on it. Forty minutes.

Who's in the room: every person who touches a computer for your business. VAs, admins, TCs, ISAs, marketing, onboarding. Not just the people you think are busy. The ones you rarely talk to usually have the most hidden busywork.

Record it. The recording is the raw material for Step 2. Turn on transcription.

The one question: "Tell me everything you do on a computer all day."

Then get out of the way.

How to keep them talking:

- Go person by person. Don't let it turn into a group discussion where one loud person answers for everyone.
- Ask "then what?" after every task. The busywork hides in the second and third step. "I export the list" becomes "then I clean it up in a sheet, then I import it, then I check it."
- Ask "how often?" Daily and weekly tasks are where the time goes.
- Ask "what do you copy from one place and paste into another?" That question alone surfaces half the list.
- Don't fix anything on the call. Don't judge. If people think they're being audited for laziness, they'll leave out the good stuff.

Last question: "What AI are you using right now, and for what?" Write the answers down. That's your baseline.

Step 2: The sort

Drop the transcript into Claude or ChatGPT with this prompt. It turns forty minutes of people talking into a ranked list of what to build first.

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This is a transcript of a meeting where every person on my real estate team described what they do on a computer all day.

Go person by person. For each one, list every repeated task they mentioned, how often they do it, and roughly how long it takes if they said.

Then sort every task into one of four buckets:
1. RECAP: turning a call, meeting or recording into a written summary
2. LOOKUP: digging through several systems to answer one question about a person, deal or lead
3. DRAFT: writing a routine email or text that follows the same pattern every time
4. AUTOPILOT: moving data from one system to another (export, reshape, import, upload)

Anything that doesn't fit, put under "needs a human" and say why.

Finally, give me the top 5 tasks to build tools for first, ranked by how many people do it times how often they do it. Only use what's in the transcript. If something is unclear, list it as a question for me instead of guessing.
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The top 5 is your build list. Most teams will find the same thing I did: almost everything lands in those four buckets.

Step 3: The four patterns

Every tool I built for my staff is one of these four. Here's what each one replaced on my side, what it looks like on a team, and a prompt you can use today.

1. The recap writer

What I built: my staff run a lot of training calls. Someone used to rewatch or skim each recording and write the recap email by hand. Now they name the call and the date, and the recap is drafted from the transcript. It's the thing my staff ask for most, without being told to.

The best prompt for it wasn't written by me. **One of my VAs wrote it.** That's the whole point of this audit: your people already know where the time goes.

On your team: team meetings, agent trainings, buyer consults, listing appointments, 1-on-1s. Anything recorded that nobody writes up.

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You are an expert minute-taker and an expert in real estate. Summarize this [meeting type]
about [topic]. Make it informative but not long: a header for each topic, with bullets for
the details. I'll send this to everyone who attended, so it has to let anyone quickly
review what mattered. Don't write "according to [name]" or anything like it. Add Key
Takeaways at the end. After that, write a ~120-word overall summary focused on [topic]. If
anything in the transcript is unclear, ask me instead of guessing.
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2. The lookup

What I built: one person's status used to be spread across several boards and the CRM. Now staff type a name and get everything in one answer, plus a flag on anything that doesn't line up. It's my most-used tool: 25 lookups from 5 different people in the first four weeks.

On your team: "Where is this deal?" "Who's working this lead?" "When does this one close?" "Is this agent hitting their numbers?"

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Look up [name or address]. Give me their contact info and who on my team owns them. Then:
current stage, last activity and date, next scheduled step, and any key dates coming up.
Flag anything that looks inconsistent, like a stage that doesn't match the last activity.
If more than one record matches, list them and ask which one. Only report what you
actually find. If a lookup comes back empty, say so.
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3. The drafter

What I built: when someone misses a session, my staff used to cross-check the roster, hunt down the right recording and the right form, and write the email from scratch. Now they ask "who missed Monday?" and get the list plus one ready-to-send group email with the right links. A person reviews it and hits send.

On your team: lead follow-ups, under-contract updates, closing checklists, past-client check-ins, "you missed the team meeting" notes.

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Write a [type of email] to [who]. Here's the situation: [2-3 sentences]. Here are the
links and dates to include: [paste].

Plain and warm. No exclamation-point cheer. Lead with why I'm writing, then exactly what
they need to do, then the deadline. End with "Any questions, just reply."

Never invent a link, date or number. If something's missing, leave it in [brackets] and
tell me.
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4. The autopilot

What I built: after every training, four people on my staff ran the same loop by hand. Export the Zoom attendance, reshape it in a spreadsheet, import it into our board, then download the recording and transcript and upload them to the right folder. One admin was entering about 50 attendance cells a week on a single board.

Now it runs every night on its own. In a 10-day test, it filled 181 attendance cells that matched what my staff had entered by hand.

This one isn't a prompt. It's a small piece of automation, and Claude can help you build it. What makes staff trust it is the rules it follows:

- Only fill blank cells. Never overwrite something a person entered.
- If two systems disagree, show both and let a person decide.
- If it can't match a name, put it on a "needs a human" list. Don't guess.
- If nothing matches at all, write nothing and raise an alert.
- File everything using the naming your team already uses.

On your team: CRM cleanup, new-transaction folder setup, weekly production reports, moving leads from one system into another.

Step 4: The rules

The fastest way to get burned by AI is letting it send something it made up. These rules sit at the top of my staff assistant's instructions. Paste them into any custom GPT or Claude Project before you hand it to your team.

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1. You never send anything. No email, no text, no CRM message, no post. You draft; a
person sends.
2. Every fact comes from a lookup done in this conversation. Never guess a person's
status, numbers, links or dates. If a lookup fails or comes back empty, say exactly that.
3. Changes are small and deliberate. Only change what the person asked for. Say what you
changed, from what, to what. Never overwrite an existing value without explicit
confirmation.
4. Stay in your lane. You can't see the owner's personal email, calendar, finances or
payments, and you don't discuss them.
5. Brand safety: never write about commission splits. No invented stats, testimonials or
results.
6. Personal info stays in the team. Don't paste phone numbers or home addresses into
drafts unless they're specifically needed.
7. Short and operational. Lead with the answer, then the list. Use names and dates. If
you're unsure what they want, ask one short question.
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Rule 1 is the one that lets you sleep at night. Your staff stay accountable for everything that goes out. AI just does the busywork before they hit send.

Step 5: The rollout

When I showed my staff the tools, a few of them got nervous.

I told them straight: use it to get better. If you don't log in and use it, we're going to have a problem.

Adoption is high now. Efficiency too.

Three things I'd tell any team leader doing this:

1. **Make it the expectation, not an option.** Optional tools get ignored. Say it once, clearly, and mean it.
2. **Make it about getting better, not getting replaced.** The busywork goes away. The judgment, the relationships and the final send stay with them.
3. **Watch what they ask for, then build more of that.** My staff ask for recaps more than anything else, unprompted. The tools I guessed they'd want barely got used. Their requests are a better roadmap than my assumptions.

Then run the meeting again in 90 days. The list will be different, and shorter.