GUIDE

The Property AI Starter Kit

Ten prompts for the property jobs nobody enjoys, plus the one-page policy that keeps client data where it belongs.

01 WHAT YOU'LL LEARN

- ✓ Ten property prompts, written for lease summaries, service charge replies, arrears chasing and landlord reports
- ✓ A one-page AI policy you hand the team, covering what goes near a tool and what never does
- ✓ The order to start in, from the first job worth fixing to the first worth automating

02 BEFORE YOU START

I qualified as a chartered surveyor and worked at JLL in London and Sydney before leaving the profession in 2012 to build and automate businesses. This is the kit I hand out at the end of a training session, so you get the useful half without waiting for me to be in the room.

Two rules before you start.

Use a paid business tier, not a personal free account. And read what comes back. Everything below produces a first draft, not a finished piece of work.

03 THE TEN PROMPTS

Paste the prompt, then paste the document or the thread underneath it. The detail in square brackets is the bit you change.

1. Lease summary

> You are summarising a commercial lease for a UK property manager. Pull out: parties, demise, term start and end, break dates and the conditions attached to each, rent and review dates, service charge provisions, repairing obligations, alienation, insurance. Put it in a table. Where the lease is unclear or silent on one of these, write UNCLEAR rather than guessing, and quote the clause number you read. Do not infer anything that is not written.

The "write UNCLEAR rather than guessing" line is the one that matters. Without it you get a confident, tidy table with an invented break date in it.

2. Service charge query reply

> Draft a reply to the leaseholder query below. Tone: professional, warm, not defensive. Explain the charge in plain English, reference the specific budget line, and give the next step if they still disagree. Keep it under 200 words. Do not commit to any refund, credit or timescale that is not stated in my notes.

3. Arrears chase, first reminder

> Draft a first arrears reminder for a UK commercial tenant. Sum outstanding [£X], due [date], property [address]. Polite, brief, assumes an oversight rather than a refusal. Give a clear way to pay and a named contact. No legal threat, no mention of forfeiture or interest at this stage.

Keep a person on the second and third letters. The early one is where automation belongs.

4. Landlord update from a messy week

> Below are my notes, emails and file notes from this week on [property]. Write the monthly landlord update. Structure: headline position, lettings, arrears, works and compliance, anything needing a decision from the landlord. Flag anything in my notes that reads as a risk. If something is missing that a landlord would expect to see, list it at the end under GAPS.

The GAPS section is worth more than the update.

5. Inspection notes into a report

> Turn these inspection notes into the property inspection section of a report. Keep every factual observation. Do not add condition judgements I have not made. Where my note is a fragment, write it as a full sentence without changing what it says. List anything ambiguous at the end for me to confirm.

6. Long thread into a position summary

> Read the email thread below. Tell me: what was agreed, what is still open, who owes the next action and by when, and where two people appear to believe different things. Quote the line that shows each disagreement. Keep it to one page.

Twenty minutes of scrolling, gone. This is the one people carry on using after the session.

7. Marketing particulars, first draft

> Write marketing particulars for [property type] at [address]. Facts below, use only these. UK English. No superlatives, no filler, no invented measurements or dates. Two versions: one for the portal listing, one for the PDF brochure.

8. Tenant question, answered once and reused

> Below is a question we get from tenants most weeks, and the correct answer as we give it now. Rewrite it as a clear standard reply, then give me three variations for different tones: brisk, apologetic, firm. Flag any part of the answer that would change depending on the lease.

9. Comparable evidence into a table

> Turn my comparable notes below into a table: address, date, area, rent or price, headline versus effective, lease terms, source. Where a figure is missing write MISSING. Do not estimate. Do not fill a gap from general knowledge. At the end list which comparables are weakest and why.

Nothing here forms an opinion. The opinion stays with you.

10. Meeting notes into actions

> Turn these notes into a list of actions. Each one: what, who owns it, by when. If an owner or a date was never stated, write OWNER NOT STATED or NO DATE rather than assigning one. Then list the decisions taken, separately from the actions.

04 THE ONE-PAGE POLICY

Put this in front of the team, adapt the bracketed parts, and get it signed off before anyone rolls anything out. One page beats a policy nobody reads.

Approved tools. Only [tool name] on a firm-managed account. Personal accounts are not approved for any client, tenant or landlord information, on any tool.

What never goes in. Anything you would not put in an email to the wrong person. In practice: client identities where the instruction is confidential, anything covered by an NDA, personal data beyond what the job needs, valuation figures before they are signed off, and anything an insurer or regulator would expect to see handled a specific way.

What is fine. Your own drafts, published documents, marketing text, general research, anything already public, and internal work with names removed.

The sign-off rule. AI drafts. A person checks and signs. Nobody sends AI output to a client, tenant or landlord without reading every line. The name on the letter is the person responsible for it, not the tool.

The professional line. No AI-produced figure, opinion or recommendation goes out as ours without a qualified person forming that view themselves. For regulated work, follow your professional body's current guidance and your PI insurer's terms, and check both before you widen use.

When something goes wrong. Tell [named person] the same day. No blame for an honest mistake reported quickly. The thing that hurts is a quiet one.

Owner. [Named person] owns this policy and reviews it every six months.

05 THE ORDER TO START IN

Most firms start with the tool and stall. This order works better.

01 **Pick one job.** The one that repeats weekly and that everyone moans about. For most property teams that is the long thread, prompt 6.

02 **Name an owner.** One person, by name, whose job it is to make this land. Without this it drifts.

03 **Write the policy.** The page above, adapted, signed off. Half a day of work that removes the reason people hesitate.

04 **Tidy your permissions.** If a decade of loose sharing means half the firm reaches the partner drawing or the salary file, an AI tool with access to your document store will find it and surface it. It has broken nothing. It has shown you what was already true. Fix it before rollout, not after.

05 **Run ten seats for a quarter.** Your busiest desks. Weekly check-in. Anyone not using it after four weeks gives the seat to someone on the waiting list.

06 **Decide the measure before you buy.** Hours back on a named job, enquiry response times, how lon a report takes. Firms that skip this end up arguing about a renewal with nothing but opinions.

07 **Then train.** Not a webinar. A session on your own work, with your own documents, where people lea having done a real job with it.

Step seven is the one that gets skipped, and it is the one that decides whether any of the rest was worth the money.

06 IF YOU WANT THE ROOM VERSION

I run these as half-day sessions and shorter tasters for property teams, in person across Hampshire and London or online, built around a short survey of your team beforehand so the examples are theirs.

Book a session and tell me the size of the room.