

PROFILE-TO-PLAYBOOK

THE 3-STEP SOP SEQUENCE

PROMPT 1 Agent Profile

Perform a search on [Agent(s)] of [Brokerage] and create an agent profile.

Include:

- The area they service.
- Their area of expertise.
- The three main categories of clients they serve.

[Agent(s)] =

[Brokerage] =

PROMPT 2 Client Experience Deep Research *(Turn On Deep Research)*

You are a Senior REALTOR® and Client Experience Strategist with 20+ years of experience in [Service Area] residential real estate. Conduct comprehensive, multi-layered research to produce the ultimate in-depth “First-Time Homebuyer Real Estate Journey Blueprint” on guiding first-time homebuyers through the complete home buying experience in [Service Area].

[Service Area] =

PROMPT 3 Transform Research into a Step-by-Step First-Time Homebuyer SOP

Role: You are a Real Estate Client Experience Architect with 20+ years of experience in designing operational systems for top-producing real estate teams that result in exceptional client satisfaction and a strong referral-based business.

Task: Transform the provided research document, “First-Time Homebuyer Real Estate Journey Blueprint” into a comprehensive, step-by-step Standard Operating Procedure (SOP) for [Agent(s)].

The final SOP must be a practical guide for [Agent(s)]. Its primary goal is to deliver an amazing, productive, and supportive experience for first-time homebuyers in [Service Area], turning them into lifelong clients and raving fans who eagerly share their experience with others.

Formatting Instructions:

- Use Markdown for clear, organized formatting.
- Use main headings for each of the major “Steps” outlined in the blueprint.
- Use bullet points and bold text to ensure the SOP is scannable and easy to follow. For each of the steps in the home buying journey as outlined in the “First-Time Homebuyer Real Estate Journey Blueprint”.

Structure your response as follows:

Step [Number]: [Title of Step from Blueprint]

1. ****Objective for the Client****: In one sentence, clearly state the main goal for the homebuyer in this stage.
2. ****Agent's Key Actions & Responsibilities****: Create a bulleted list of the primary tasks and duties the agent must perform during this step. Base these actions directly on the details provided in the source document.
3. ****Client Care & 'Raving Fan' Touchpoints****: This is the most critical section. Based on the information and context in the blueprint, create a bulleted list of proactive, high-impact actions the agent can take to provide an exceptional experience and demonstrate outstanding care.

Think about:

- How can we simplify complex topics (e.g., financing, contingencies)?
- What key information should we proactively provide to reduce client anxiety?
- How can we celebrate small wins and milestones with the client?
- How do we set clear expectations for the next phase?

4. ****Essential Resources & Checklists for Client****: Based on the document, create a bulleted list of specific tools, resources, or simple checklists the agent should provide to the client at this stage.

Examples include:

- A checklist of required financial documents.
- A summary of local first-time buyer programs.
- A "Needs vs. Wants" worksheet.
- A comparison of property types (Condo vs. Townhouse).

Tone & Style: Please ensure the tone of the entire SOP is professional, encouraging, and client-centric. Combine authoritative local expertise with approachable, authentic communication. Content should be jargon-free, emotionally resonant, and formatted for immediate team deployment across all client interactions.

Goal: The final output should be a complete, actionable playbook that any agent on our team can use to create a seamless and positive home buying journey for their first-time clients. Ensure each touchpoint highlights [Agent(s)]' deep [Service Area] expertise and proven results—so first-time buyers feel informed, empowered, and confident choosing us as their trusted guide from consultation through closing.

[Agent(s)] =

[Service Area] =