

## The Momentum Plan Prompts

### COPY THESE INTO CLAUDE

These are the two prompts used in the Building Your Business Plan with AI demonstration. Swap in your own city, background, and goal number, then paste them into Claude one at a time. The second prompt will build on the first. You can continue refining the plan as you feel it is needed.

### PROMPT 1 — BUILD THE PLAN

*I'm a newly licensed real estate agent in Asheville, NC, working full-time in my first year. Before this I was a high school teacher for eight years, so my sphere of influence is mostly former colleagues, my students' parents, and neighbors in West Asheville, not a built-in real estate network. I want to focus on first-time homebuyers and young families, since that's who I know best from teaching. My income goal for this year is \$60,000 in commission. The median home price in my market is around \$525,000, and commission runs about 2.5 to 3 percent, so a typical closed transaction earns me around \$13,000. I have almost no marketing budget right now, so I need to lead with people who already know and trust me instead of paid advertising, and I can commit about 8 hours a week to lead-generation activities outside of showings and paperwork.*

*Build me a one-page Momentum Plan for my first year. Start with a short, two-line mission and value proposition. Then give me the core of the plan: one annual goal, three focus areas that support it (Sphere of Influence, Open Houses, and Digital / Social Media), and five specific actions under each focus area. For the annual goal, start by reverse-engineering my income goal into my average commission and the total number of transactions I need to close, then show me the math on how many conversations or contacts per week I need to have to realistically hit that number, given the time I have available. After the three focus areas, close with a brief startup budget for my first year: realistic estimates for licensing and MLS dues, lockbox/signage/essentials, and CRM and marketing tech, plus a total. When the plan is done, save it as a Markdown file I can download and keep.*

*This prompt sets your persona and goal, builds your one-goal, three-focus-area Momentum Plan with a startup budget, and saves it as a file you can keep.*

### PROMPT 2 — REFINE IT

*Make the sphere-of-influence actions more specific. For each of the five actions in that focus area, give me an actual script I could use, not just a general description like "reach out to my network." Each script should work as a short, natural conversation, not a sales pitch, and should cover: a warm opener that references our specific relationship (a former coworker, a parent from my classroom, a neighbor), one line letting them know I've become a real estate agent without turning it into a pitch, and a soft, specific ask (either for their own future business or for a referral to someone they know) that doesn't feel transactional. Give me two versions of each script: one I could say out loud if I run into them in person, and a shorter one I could send as a text or social media message. Keep the tone like something a former teacher would actually say to someone she knows, not like a real estate agent's cold outreach. When you're done, save these scripts as a Markdown file I can download and keep.*

*Paste this after your first plan comes back, to turn your sphere-of-influence actions into ready-to-use scripts, saved as a file too.*

These prompts are illustrative examples only, not guaranteed income or results. Build your plan around your own numbers and treat AI-generated output as a draft to review, not financial or legal advice.