

Buyer Consultation Prep

OCTOBER 19, 2028

Buyer Consultation Prep

Turns raw buyer notes, a CRM dump, or an intake file into a defensible search strategy; must-haves versus nice-to-haves, budget and financing read, neighbourhood shortlist, showing plan, and the questions still worth asking.

BUYER REPRESENTATIONREAL ESTATE
#AI DEALS#BROKER READY#BUYER CONSULTATION#BUYER MATCH#HOME SEARCH#REAL ESTATE#REALTOR#RSK FLOW#SEARCH CRITERIA#SHOWINGS

What this agent does

Get from a messy buyer conversation to a search you can actually run, without losing the detail that matters to the client.

Turns raw buyer notes, a CRM dump, or an intake file into a defensible search strategy; must-haves versus nice-to-haves, budget and financing read, neighbourhood shortlist, showing plan, and the questions still worth asking.

Who it is for

Buyer agents and teams who take intake notes in whatever form the client gives them and need a consistent search brief every time.

What it needs from you (inputs)

Buyer notes or a CRM dump (plus an optional intake file), the properties they already liked, budget and financing status, location preferences, property specs, and their must-haves, nice-to-haves and deal-breakers.

What it gives back (outputs)

A buyer match summary, consultation brief, structured search criteria, neighbourhood recommendations, showing strategy, buyer questions, risk flags, next steps, and Drive save status.

- Buyer Match Summary
- Buyer Consultation Brief
- Search Criteria
- Neighbourhood Recommendations
- Showing Strategy
- Buyer Questions
- Risk Flags
- Next Steps

Highlights

- Paste-anything intake — CRM notes, texts, intake forms, or an uploaded export
- Structured search criteria the agent can hand to the MLS
- Must-have vs nice-to-have vs deal-breaker separation
- Neighbourhood recommendations with the reasoning shown
- Showing strategy and a consultation brief for the appointment
- Risk flags and the questions still unanswered

Time saved per run: about 1.5 hours.

This agent drafts work for a licensed professional to review. It is not legal, tax, or financial advice, and it does not replace broker, title, lender, or attorney review.

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REAL ESTATE AI AGENT

Buyer Consultation Prep

Turn buyer notes, CRM text, an intake file, and the properties they liked into a practical search strategy and a consultation brief you can walk into an appointment with.

Readiness 56Search quality 10

Buyer intake

Fastest path: paste the whole conversation. Structured fields below override anything inferred from the dump.

CRM / buyer notes dump

- Avoid assuming school quality or neighborhood suitability without discussing objective criteria.
- Verify commute times, HOA fees, listing availability, and property details before making recommendations.
- Do not invent active MLS listings or claim that any properties were verified.

REQUESTED RESULT

Prepare a buyer consultation brief, readiness assessment, structured MLS search criteria, neighborhood shortlist, showing strategy, unanswered questions, risk flags, and a prioritized action plan for the agent.

Upload CRM export / intake file

Optional. PDF, DOCX, DOC or TXT.

Choose FileNo file chosen

Buyer nameBuyer temperature

Example Buyer Familywarm

Interested property addresses / links

1124 Desert Pines Ave, Las Vegas, NV 89135
8490 Canyon Vista Dr, Las Vegas, NV 89148

Timeline and financing

These drive the readiness score and how hard the showing plan pushes.

TimelineTarget move date

within_90_daysmm/dd/yyyy

Pre-approvedPre-approval letter on file

truefalse

Budget minimumBudget maximum

625000725000

Cash buyerFirst-time buyer

unknownunknown

Where they want to be

City or ZIP is what makes the neighbourhood recommendations specific rather than generic.

Preferred cityPreferred ZIP code

Las Vegas89135

Search radius (miles)Property type

single_family_residence

Neighbourhood preferences

Summerlin, The Lakes, Rhodes Ranch, Southern Highlands

What they need

Deal-breakers matter as much as must-haves — they are what stops you showing the wrong home.

Must-have features

4 bedrooms, home office, 2-car garage or larger, fenced yard

Deal breakers

Busy street, major fixer, very small yard, long commute

Nice-to-have features

Pool, covered patio, mountain views, newer construction

Advanced options property specs, preferences and lifestyle

Add a city or ZIP so the neighbourhood recommendations are specific to this market.

Estimated credits: 0 (Balance: 200)

Preparing the consultation...

GENERATED AI AGENT

Consultation Prep Summary

Draft ReadySort

Draft is ready. Check, save, or continue with an AI agent.

Run ID: 802 | Artifacts: 8 | Auto-mapped fields: 8 | Credits Reserved: 0 | Credits Charged: 0 | Credits Breakdown: Base 0

Consultation Prep Summary

Copy HTMLCopy Text

Buyer Consultation Brief

Copy HTMLCopy Text

Search Criteria

Copy HTMLCopy Text

Neighborhood Recommendations

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Showing Strategy

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Buyer Questions

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Risk Flags

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Next Steps

Copy HTMLCopy Text

RetryStart fresh