PAPERLESS AGENT

MEMBER TRAINING COMPANION GUIDE

CREATE A MARKET REPORT WITH AI

Turn verified RPR or MLS data into a polished, branded HTML email using Claude or ChatGPT. Build the design once, then update it with fresh numbers each month.

YOUR SOURCE	YOUR DESIGN	EVERY MONTH
VERIFIED DATA	**ONE TEMPLATE**	**NEW NUMBERS**
Download a current Market Activity Report from RPR or your MLS.	Use the HTML template to control the report's structure and visual style.	Upload the latest report, review the results, and send a test email.

1	2	3
MARKET DATA	**CLAUDE OR CHATGPT**	**HTML EMAIL**

BEFORE YOU START

WHAT YOU NEED

- ☐ A current Market Activity Report from RPR or your MLS
- ☐ The HTML market report template included with this training
- ☐ Your logo, headshot, contact information, website, and brand colors
- ☐ Access to Claude or ChatGPT on a computer

1 DOWNLOAD YOUR MARKET DATA

Run a Market Activity Report for the area you want to cover. Confirm the city, ZIP code or neighborhood, property type, reporting period, and any price range before downloading the report.

CHECK THE REPORT
Use the newest complete reporting period available. Clearly label the period in the finished email.

SEGMENT WHEN NEEDED
Create separate reports for different property types or audiences when one report would be too broad.

2 UPLOAD THE TWO FILES

Open Claude or ChatGPT and upload both your RPR or MLS Market Activity Report and the HTML market report template.

1
MARKET REPORT
Supplies the verified numbers.

2
HTML TEMPLATE
Supplies the structure and design.

3
YOUR INSTRUCTIONS
Supplies the market, voice, and brand.

BUILD THE REPORT

GIVE AI THE DATA, DESIGN, AND DIRECTION

3 RUN THE MARKET REPORT PROMPT

Replace the bracketed market name, then paste the prompt below into the same conversation where you uploaded the files.

COPY THIS PROMPT

Create a real estate market report for **[CITY OR AREA]** using the Market Activity Report provided. The output should be an HTML email. Use the attached HTML template for the structure and design. Replace the existing market information with the data from my report. Clearly identify the reporting period and do not invent or estimate any missing information. If anything is unclear, ask me before completing the report.

4 ADD YOUR BRANDING

Give the AI your agent or team name, brokerage, phone number, email, website, colors, fonts, and preferred call to action. Upload your logo, headshot, and any property images you want included.

BE SPECIFIC
Provide exact color codes and font names instead of saying only 'use my colors' or 'make it modern.'

REPLACE EVERYTHING
Confirm that the original market, agent name, links, images, and contact information are removed from the template.

5 ADD YOUR LOCAL PERSPECTIVE

Ask the AI to explain what the numbers mean for buyers, sellers, and homeowners. Then add your own observations, local knowledge, and recommendations before publishing.

OPTIONAL FOLLOW-UP PROMPT
Add a short explanation of what this market data means for local buyers, sellers, and homeowners. Keep the language conversational and useful. Do not make predictions that are not supported by the provided data.

BEFORE YOU SEND

VERIFY, TEST, AND SAVE

6 REVIEW EVERY NUMBER

Compare the completed report with the original RPR or MLS document. Confirm prices, inventory, sales activity, days on market, comparisons, dates, links, and contact information.

☐ All statistics match the source report	☐ The reporting period is clearly identified
☐ No missing information was invented or estimated	☐ Agent and brokerage information is correct
☐ Images, buttons, links, and calls to action work	☐ Required brokerage and advertising disclosures are included

7 SEND YOURSELF A TEST

Add the finished HTML to your preferred email or CRM platform. Send a test and review it on both a computer and a phone. Check the formatting, image loading, buttons, links, and contact information.

8 SAVE THE TEMPLATE FOR NEXT MONTH

Save the approved HTML as your reusable market report template. Next month, upload that template with the newest Market Activity Report and ask the AI to update the numbers and commentary while preserving the design.

EVERY MONTH AFTER THAT

NEW DATA IN. UPDATED REPORT OUT.

Upload the latest source report and your saved template, run the prompt, verify the numbers, and send yourself a test.

AI can organize and design the report, but you remain responsible for the accuracy, compliance, and final content sent under your name.