RE/MAX Town Center

AGENT TRAINING · OCTOBER 2026

# Agent AI Roadmap

Which AI tool to use for 74 everyday tasks, before, during and after the sale.

| 1 Before the transaction | 2 During the transaction | 3 After the transaction |
|---|---|---|
| 46 tasks | 15 tasks | 13 tasks |

## How to read the charts

- ✓ Free — works on the free version
- ✓ Paid — needs the paid plan
- · — not a good fit for this task
- BEST — our top pick, first in every note

## Ground rules for every task

- You review everything AI writes before a client sees it. You are the licensed broker.
- Never let AI make up numbers, features or facts about a home.
- Run listing descriptions and ads through a fair housing check.
- Email subject lines must be accurate, and texts go only to people who opted in. Washington law is strict on both.
- No AI voice calls to leads without written consent.
- Before uploading client documents, turn off model training in each tool's privacy settings and connect work accounts, not personal ones.

## What each tool costs

| | |
|---|---|
| **Claude** | **Free:** chat, web search, files, Claude Docs, Slides and Design, connectors like Canva, Gmail and Google Calendar.<br>**Pro, $20/mo** ($17 billed yearly): scheduled tasks, Research, Claude in Chrome. |
| **ChatGPT** | **Free:** chat, a few images a day, file uploads.<br>**Plus, $20/mo:** agent mode, scheduled Tasks, Sora video, more images. |
| **Gemini** | **Free:** chat, images, connections to Gmail, Calendar and Drive.<br>**Google AI Pro, about $20/mo:** video, more image credits, deeper research. |
| **Muse** | **Free:** weekly allowance; connects to Gmail, Google Calendar, Instagram and Facebook, and uses a browser for you.<br>**Power, $20/mo** or **Maximum, $100/mo**. |
| **Other** | RPR is free with NAR membership. BoldTrail and Marketing Studio come with RE/MAX. Canva has a free plan. ListedKit is about $10 to $15 per transaction. |

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PHASE 1 OF 3 · 46 TASKS

# Before the transaction

This is where AI saves the most time: marketing, lead follow-up, listing prep and buyer prep.

## Marketing and lead generation 23

| Task | Claude | ChatGPT | Gemini | Muse | Other | Notes |
|---|---|---|---|---|---|---|
| Build your business plan and yearly goals | ✓ Free | ✓ Free | ✓ Free | ✓ Free | | BEST **Claude or ChatGPT.** Upload last year's numbers. |
| Research your farm area | ✓ Free | ✓ Free | ✓ Free | ✓ Free | RPR | BEST **RPR for the data, then a chat tool to summarize it.** |
| Write your bio and About Me page | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** Give it your real stories and numbers. |
| Plan a monthly content calendar | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** |
| Draft weekly social posts | ✓ Free | ✓ Free | ✓ Free | ✓ Free | Marketing Studio | BEST **A Claude scheduled task (Paid) that drafts four posts every week.** |
| Create AI images for posts | ✓ Free | ✓ Free | ✓ Free | ✓ Free | Canva | BEST **Gemini or ChatGPT free.** Claude makes images through the Canva connector. Never use AI images to show a real listing. |
| Design flyers and branded graphics | ✓ Free | ✓ Free | · | · | Canva, Marketing Studio | BEST **Claude connected to Canva.** Print pieces and social graphics need the RE/MAX disclaimer with the current year. |
| Post and schedule social content | · | · | · | · | Marketing Studio, Canva (Pro) | BEST **Marketing Studio.** Muse can read Instagram, but posting is not confirmed yet. |
| Write video scripts | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** |
| Make AI video clips | · | ✓ Paid | ✓ Paid | · | Marketing Studio | BEST **ChatGPT Plus (Sora) or Google AI Pro (Veo).** |
| Write the monthly email newsletter | ✓ Free | ✓ Free | ✓ Free | ✓ Free | BoldTrail | BEST **Claude to write, BoldTrail to send.** Keep subject lines accurate. |
| Write a monthly market update | ✓ Free | ✓ Free | ✓ Free | · | RPR | BEST **RPR or NWMLS numbers, written up by Claude.** Never let AI guess stats. |
| Write blog posts and website pages | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** |
| Write Google Business Profile posts | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Gemini or Claude for the copy.** |
| Answer new online leads within minutes | · | · | · | · | BoldTrail Concierge AI, RE/MAX Max | BEST **BoldTrail.** Ask whether your MAXTECH plan includes it. |
| Draft lead follow-up texts and emails | ✓ Free | ✓ Free | ✓ Free | ✓ Free | BoldTrail | BEST **BoldTrail templates or Claude.** Text only people who opted in. |

| Task | Claude | ChatGPT | Gemini | Muse | Other | Notes |
|---|---|---|---|---|---|---|
| Sort and prioritize your inbox | ✓ Free | ✓ Paid | ✓ Free | ✓ Free | | BEST **Muse or Gemini with Gmail connected.** |
| Get a daily briefing of your day | ✓ Paid | ✓ Paid | ✓ Free | ✓ Free | | BEST **Muse with your calendar and email, or a Claude scheduled task.** |
| Pick who to call this week from your database | ✓ Free | ✓ Free | ✓ Free | · | BoldTrail | BEST **Upload a BoldTrail export to Claude and ask who to call and why.** |
| Write call scripts and objection handlers | ✓ Free | ✓ Free | ✓ Free | · | | BEST **ChatGPT or Claude.** |
| Practice scripts out loud | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Gemini Live or ChatGPT voice mode for role-play.** |
| Promote an open house | ✓ Free | ✓ Free | ✓ Free | · | Marketing Studio, Canva | BEST **Claude plus Canva for posts and signs.** |
| Follow up with open house visitors | ✓ Free | ✓ Free | ✓ Free | ✓ Free | BoldTrail | BEST **A BoldTrail campaign with Claude-written messages.** Text only with consent. |

## Listing prep (sellers) 16

| Task | Claude | ChatGPT | Gemini | Muse | Other | Notes |
|---|---|---|---|---|---|---|
| Research a property before the appointment | ✓ Free | ✓ Free | ✓ Free | · | RPR | BEST **RPR property report.** |
| First-pass CMA | ✓ Free | ✓ Free | ✓ Free | · | RPR | BEST **RPR AI CMA, then Claude to explain it.** Pull comps from Matrix or RPR. You set the price. |
| Build your listing presentation | ✓ Free | ✓ Free | · | · | Marketing Studio | BEST **Claude Slides.** |
| Make a seller net sheet | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** Check it against escrow's numbers. |
| Write a seller prep checklist | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** |
| Get staging ideas from room photos | ✓ Free | ✓ Free | ✓ Free | · | | BEST **ChatGPT or Gemini.** Upload the photos. |
| Virtually stage empty rooms | · | ✓ Free | ✓ Free | · | RE/MAX AI staging tools | BEST **RE/MAX tools.** Always disclose virtual staging. Never change permanent features. |
| Book the photographer, cleaners and vendors | ✓ Paid | ✓ Paid | · | ✓ Free | | BEST **Muse with your work email and calendar.** Claude in Chrome and ChatGPT agent can also do it. |
| Write the MLS description | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** Run a fair housing check and stay within NWMLS limits. |
| Edit listing photos | · | ✓ Free | ✓ Free | · | | BEST **Leave it to your photographer.** Never hide defects. |

| Task | Claude | ChatGPT | Gemini | Muse | Other | Notes |
|---|---|---|---|---|---|---|
| Build a single-property website | ✓ Free | · | · | · | BoldTrail, Marketing Studio | BEST **BoldTrail property site.** |
| Launch the listing marketing campaign | ✓ Free | ✓ Free | ✓ Free | · | Marketing Studio, Canva | BEST **Marketing Studio, with Claude plus Canva for extras.** |
| Make a listing video | · | ✓ Paid | ✓ Paid | · | Marketing Studio | BEST **Marketing Studio AI video.** |
| Send weekly seller updates | ✓ Free | ✓ Free | ✓ Free | ✓ Free | | BEST **Claude.** A scheduled task (Paid) can draft it every Friday. |
| Summarize showing feedback | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** Paste in the feedback. |
| Compare multiple offers | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude for a side-by-side.** You advise the seller. |

## Buyer prep 7

| Task | Claude | ChatGPT | Gemini | Muse | Other | Notes |
|---|---|---|---|---|---|---|
| Prep for the buyer consultation | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude for a questionnaire and agenda.** |
| Explain the buyer agreement in plain words | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** You explain and advise; AI never gives legal advice. |
| Find listings that match a buyer | ✓ Free | ✓ Free | ✓ Free | · | NWMLS.com AI search, BoldTrail | BEST **NWMLS.com AI search and BoldTrail saved searches.** |
| Plan the showing tour route | ✓ Free | ✓ Free | ✓ Free | ✓ Free | ShowingTime | BEST **Gemini (Google Maps).** Book the showings in ShowingTime. |
| Research neighborhoods and schools | ✓ Free | ✓ Free | ✓ Free | ✓ Free | RPR | BEST **RPR.** Share facts only. Never steer buyers. |
| Run affordability and payment numbers | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude or ChatGPT.** Estimates only; the lender confirms. |
| Prep offer strategy and comps | ✓ Free | ✓ Free | ✓ Free | · | RPR | BEST **Claude to organize it.** You decide the strategy. |

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PHASE 2 OF 3 · 15 TASKS

# During the transaction

From mutual acceptance to closing, AI tracks the dates and drafts the updates. You handle the advice and the negotiating.

| Task | Claude | ChatGPT | Gemini | Muse | Other | Notes |
|---|---|---|---|---|---|---|
| Pull all dates and deadlines from the contract | ✓ Free | ✓ Free | ✓ Free | · | ListedKit | BEST **ListedKit for every deal, or upload the agreement to Claude.** Check every date against the contract. |
| Build the transaction timeline and checklist | ✓ Free | ✓ Free | ✓ Free | · | ListedKit | BEST **ListedKit or Claude Docs.** |
| Put deadlines on your calendar with reminders | ✓ Free | ✓ Paid | ✓ Free | ✓ Free | ListedKit | BEST **Muse or Gemini with Google Calendar connected.** |
| Send clients weekly status updates | ✓ Free | ✓ Free | ✓ Free | ✓ Free | ListedKit | BEST **Claude to draft.** A scheduled task (Paid) can draft them on a set day. |
| Email the lender, escrow and other agent | ✓ Free | ✓ Free | ✓ Free | ✓ Free | | BEST **Gemini in Gmail or Muse.** Muse asks before sending. |
| Schedule the inspection, appraisal access and final walkthrough | ✓ Paid | ✓ Paid | · | ✓ Free | ShowingTime | BEST **Muse for vendors, ShowingTime for access.** |
| Summarize the inspection report | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** Upload the PDF. The inspector explains findings; never quote repair costs as fact. |
| Draft the inspection response | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude for the draft.** What to ask for is your call; the final goes on the NWMLS form. |
| Find contractors and get repair bids | ✓ Paid | ✓ Paid | ✓ Free | ✓ Free | | BEST **Muse to search and email contractors.** |
| Track earnest money and contingency dates | ✓ Paid | ✓ Paid | · | ✓ Free | ListedKit | BEST **ListedKit.** |
| Check documents for missing signatures and initials | ✓ Free | ✓ Free | ✓ Free | · | ListedKit | BEST **ListedKit.** Managing broker review still applies. |
| Explain closing costs to buyers | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude for plain-language explanations.** Escrow and lender numbers are final. |
| Make a moving and utilities checklist for clients | ✓ Free | ✓ Free | ✓ Free | ✓ Free | | BEST **Claude.** A nice value-add for every client. |
| Confirm closing day details (time, place, keys) | ✓ Free | ✓ Free | ✓ Free | ✓ Free | | BEST **Muse to confirm with everyone and add it to your calendar.** |
| Track your commission and deal records | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude to build a simple tracker.** |

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PHASE 3 OF 3 · 13 TASKS

# After the transaction

The closing is where your next deal starts. AI keeps you in touch so past clients turn into referrals.

| Task | Claude | ChatGPT | Gemini | Muse | Other | Notes |
|---|---|---|---|---|---|---|
| Pick and order a closing gift | ✓ Free | ✓ Free | ✓ Free | ✓ Free | | BEST **Muse.** It can shop for you and asks before any purchase. |
| Write a thank-you note | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude for the draft.** Write it by hand. |
| Ask for a review | ✓ Free | ✓ Free | ✓ Free | ✓ Free | RateMyAgent (via Marketing Studio) | BEST **Claude writes a personal request and saves it to your Gmail drafts (free Gmail connector).** You review and hit send. Include your Google review link. |
| Respond to online reviews | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** Never confirm a client relationship or share deal details in a reply. |
| Turn reviews into testimonial graphics | ✓ Free | ✓ Free | ✓ Free | · | Canva | BEST **Paste the testimonial into Gemini free for a quick graphic, or use Claude with Canva for branded ones.** Get the client's OK first. |
| Post a Just Sold announcement | ✓ Free | ✓ Free | ✓ Free | · | Marketing Studio, Canva | BEST **Marketing Studio.** Get the client's OK before naming them or showing their faces. |
| Add the client to a past-client plan | ✓ Free | ✓ Free | ✓ Free | · | BoldTrail Smart Campaigns | BEST **BoldTrail, with Claude writing the messages.** |
| Send home anniversary and birthday touches | ✓ Paid | ✓ Paid | · | ✓ Free | BoldTrail | BEST **BoldTrail automation.** Muse can remind you to call. |
| Send a yearly home value update | ✓ Free | ✓ Free | ✓ Free | · | RPR, BoldTrail | BEST **RPR report with a short Claude-written note.** |
| Ask for referrals | ✓ Free | ✓ Free | ✓ Free | · | | BEST **ChatGPT or Claude for scripts.** Practice them in voice mode. |
| Review your business numbers monthly | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude.** Upload your tracker and ask what's working. |
| Organize receipts and mileage for taxes | ✓ Free | ✓ Free | ✓ Free | · | | BEST **Claude to sort receipts into a spreadsheet for your CPA.** |
| Organize the closed file for records | ✓ Free | ✓ Free | ✓ Free | · | ListedKit | BEST **ListedKit or Claude for a checklist.** The managing broker gets the complete file. |

**Plans and prices change often.** Checked October 8, 2026 against each tool's pricing page: claude.com/pricing, openai.com, Google AI plans, Meta's Muse launch coverage, boldtrail.com, RE/MAX Marketing Studio and listedkit.com.

Questions or ideas for this roadmap? Bring them to Tuesday training in the Mill Creek conference room.

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