



ABOUT ME

8+ Years of Transforming Businesses with AI

AI Innovator

- Designing advanced AI solutions that empower businesses to scale faster and operate smarter.

Scaling Businesses with Intelligence

- Specialized in creating AI-driven strategies that streamline operations, boost efficiency, and drive revenue growth.

Focused on Results

- Passionate about leveraging AI to deliver measurable outcomes, from automating workflows to optimizing decision-making.

Sharon Shahrokhi Tehrani



IS THERE ANYTHING AI-RELATED IN REAL ESTATE WE HAVEN'T COVERED YET THAT YOU'D LIKE US TO DISCUSS?



Sharon Shahrokhi Tehrani

CLIENT EDUCATION AND CHATBOTS





WHY WE'RE HERE

Picture a **first-time homebuyer** feeling overwhelmed by the real estate market. Late at night, they visit a realtor's website and are greeted by a **friendly chatbot**. This AI companion provides instant answers and tailored resources, helping buyers feel informed and supported. As trust builds, the realtor becomes a go-to expert, fostering lasting loyalty through seamless client engagement.

CLIENT EDUCATION AND CHATBOTS

1

Chatbots

24/7 Availability

- AI-powered chatbots provide instant responses to client inquiries anytime, anywhere.

Personalized Follow-Ups

- After interacting with a chatbot, clients receive automated follow-up messages tailored to their needs.

Value & Impact

- Enhances the client experience with instant, accurate information.
- Reduces workload on agents, allowing them to focus on complex tasks.
- Strengthens client relationships through ongoing engagement and trust.



CLIENT EDUCATION AND CHATBOTS

Website Integration

- **Embedded Chatbot** Widgets: Many platforms offer customizable chatbot widgets that can be easily embedded into real estate websites.
- **Full-Page Chatbots:** A full-page chatbot can be deployed on the website to engage visitors through FAQs and personalized property recommendations. For instance, a chatbot can ask users about their preferred location, budget, and property type and dynamically generate a list of relevant properties based on their responses.



CLIENT EDUCATION AND CHATBOTS

Social Media Integration

- **Multi-Channel Chatbots:** Integrating chatbots with social media platforms like Facebook Messenger, WhatsApp, and Instagram allows real estate agents to engage clients where they are most active. These chatbots can handle inquiries, schedule viewings, and provide property details directly through social channels, streamlining communication and enhancing lead qualification processes.
- **Proactive Engagement:** Chatbots can initiate conversations based on user behaviour on social media. For example, if a potential buyer shows interest in a property post, the chatbot can send a message like, “Looking for something specific? I can help you find it!” This proactive approach keeps prospects engaged and increases conversion rates.



CLIENT EDUCATION AND CHATBOTS

CRM Integration

- **Lead Qualification and Management:** Chatbots can be integrated with Customer Relationship Management (CRM) systems to efficiently gather and analyze visitor data during interactions. Chatbots can capture valuable real-time information that updates customer profiles by asking qualifying questions about budgets, preferences, and timelines. This integration ensures that agents focus on serious prospects while automating lead management tasks.



CLIENT EDUCATION AND CHATBOTS

Appointment Scheduling

- **Meeting Scheduler Integration:** Many chatbot solutions now include features that allow users to schedule appointments directly through the chatbot interface. By integrating scheduling apps, agents can allow clients to book consultations or property viewings at their convenience, making the process more efficient and user-friendly.



CLIENT EDUCATION AND CHATBOTS

Instant Property Information

- **Real-Time Responses:** Chatbots can immediately answer common inquiries about property details, pricing, and availability. This instant access to information ensures that potential clients receive timely support without waiting for human agents to respond.



CLIENT EDUCATION AND CHATBOTS

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CLIENT EDUCATION AND CHATBOTS

Example.

Scenario 1: Instant Inquiry Response

Prompt: “You are a real estate chatbot. A potential buyer asks, ‘What steps are involved in buying a home?’ Provide a clear and concise response outlining the key steps.”

Example.

Scenario 2: Personalized Follow-Up Message

Prompt: “You are an AI assistant for a real estate agency. After a client interacts with the chatbot about first-time homebuyer tips, create a personalized follow-up message thanking them and providing additional resources.”



CLIENT EDUCATION AND CHATBOTS

Zapier



CLIENT EDUCATION AND CHATBOTS

2 Tailored Educational Content

Market Insights on Demand

- AI analyzes market trends, price fluctuations, and neighbourhood statistics, equipping agents with data-driven insights.

Customized Buyer & Seller Guides

- AI helps real estate agents create detailed, personalized guides for clients.

Value & Impact

- Empowers clients with valuable knowledge for better decision-making.
- Positions agents as trusted advisors by providing proactive, relevant information.
- Enhances client satisfaction, leading to stronger relationships and competitive advantage.



CLIENT EDUCATION AND CHATBOTS

Example.

Scenario 1: Market Insights Report

Prompt: “You are an AI tool analyzing real estate market data. Generate a brief report for clients highlighting current market trends and the best time to buy or sell.”

Example.

Scenario 2: Customized Guide Creation

Prompt: “You are a real estate agent. Create a customized guide for first-time homebuyers. Outline the key sections of this guide.”



CLIENT EDUCATION AND CHATBOTS



Feedback Mechanism

Post-Transaction Surveys

- After closing a deal, AI-generated feedback surveys help agents measure client satisfaction.

Value & Impact

- Helps agents refine their services based on honest client feedback.
- Demonstrates commitment to client care, fostering loyalty.
- Encourages positive word-of-mouth referrals, strengthening long-term success.



CLIENT EDUCATION AND CHATBOTS

Example.

Scenario 1: Post-Transaction Survey Creation

Prompt: “You are an AI assistant helping a real estate agent design a post-transaction survey for clients. Create five questions that gauge client satisfaction.”

Example.

Scenario 2: Analyzing Feedback Results

Prompt: “You are an AI tool analyzing feedback from post-transaction surveys. Summarize the key findings based on hypothetical responses.”



TRANSACTION MANAGEMENT





WHY WE'RE HERE

Imagine a **busy real estate agent** juggling multiple transactions, each with its own documents and deadlines. The stress mounts until they discover a transaction management tool that **centralizes** everything. With **automated eSigning** and **compliance checks**, chaos turns into clarity. The agent can track progress effortlessly, ensuring smooth closings and transforming a potentially stressful process into a seamless journey for their clients.

TRANSACTION MANAGEMENT

Example.

Scenario 1: Automated Document Review Process

Prompt: “Create a compliance checklist for reviewing closing documents in Ontario, ensuring all necessary documents are included.”

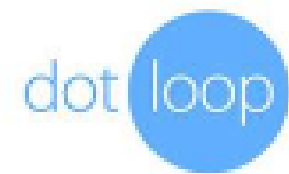
Example.

Scenario 2: Training New Agents on Compliance Procedures

Prompt: “Create a training outline for new agents on compliance requirements in real estate transactions in Ontario.”



TRANSACTION MANAGEMENT



peoplework, not paperwork.

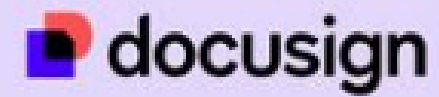
peoplework

dotloop is the collaboration platform where real estate pros get deals done.

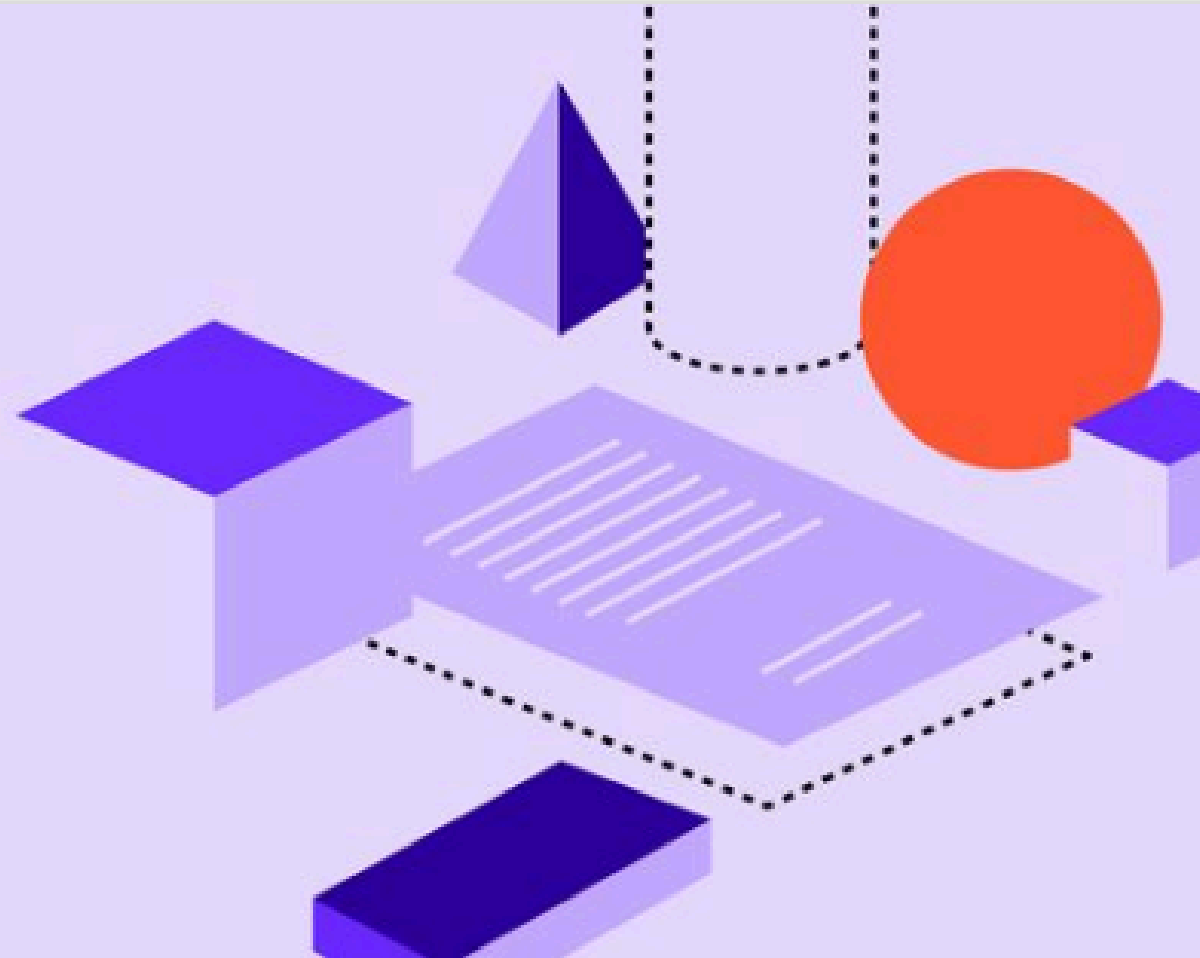
 dotloop.com



TRANSACTION MANAGEMENT



Intelligent
Agreement
Management



#1 in Electronic Signature and Intelligent Agreement Management

Create, commit to and manage your agreements all in one platform with DocuSign IAM. Electronically sign for free.

 docusign.com



AGENTIC AI



INTRODUCTION TO AGENTIC AI

What is Agentic AI?

Agentic AI is a sophisticated form of artificial intelligence that can act **autonomously**, make decisions, and learn from interactions with its environment. Unlike traditional AI systems that primarily rely on predefined algorithms and human input, agentic AI can analyze complex datasets, recognize patterns, and adapt its behaviour based on real-time feedback.

- Managing Schedules
- Optimizing Processes,
- Providing Personalized Recommendations, thereby enhancing efficiency and effectiveness in various fields.



NVIDIA AI Building Blocks for Agentic AI

The screenshot displays a 'Service Operations Workspace' interface. The main incident is titled 'Issues logging into CRM' with a 'High' severity. The details table shows the incident was opened on 2025-01-02 15:14 by Savannah Nguyen, assigned to Anna Marie, with a severity of High. The channel is Branch, network is ITSM, and the assignment group is Software. The 'Related Resources' section includes two articles: 'CRM Service Connectivity Troubleshooting' and 'Temporary Workaround for CRM Data Access'. The 'Now Assist' panel on the right shows a list of AI agent actions: Incident Identification AI Agent (4 steps taken), Diagnostic AI Agent (267 steps taken), Next Best Action AI Agent (144 steps taken), and Internal Communications AI Agent (34 steps taken). A 'Share' button is visible in the top right corner.

Watch on YouTube

Sharon Shahrokhi Tehrani

SALES AND MARKETING AI AGENTS

Building Lead Lists

AI agents excel in aggregating and analyzing vast amounts of data to identify potential leads. By scouring various data sources, including social media platforms, company websites, and industry forums, AI can compile comprehensive lead lists tailored to specific criteria. This automation accelerates the lead generation process and ensures that the leads are relevant and high-quality.



SALES AND MARKETING AI AGENTS

Sending Personalized Communications

Personalization is key to effective marketing, and AI agents enable businesses to craft individualized messages at scale. By analyzing customer data—such as past interactions, purchase history, and browsing behaviour—AI can generate personalized content that resonates with each recipient.

For example, AI-driven email campaigns can adjust subject lines, content, and send times based on the recipient's preferences and behaviours, leading to higher engagement rates.



SALES AND MARKETING AI AGENTS

Qualifying Leads More Effectively Than Humans

AI agents can assess and score leads with remarkable accuracy by evaluating various factors, including engagement levels, demographic information, and behavioural data. This automated lead qualification process ensures that sales teams focus on prospects with the highest potential, increasing conversion rates and optimizing resource allocation.



SALES AND MARKETING AI AGENTS

Strategizing and Executing Marketing Campaign

Beyond planning, AI agents can autonomously execute marketing campaigns across multiple channels. They can determine the optimal mix of marketing channels, allocate budgets, and adjust strategies in real-time based on performance data. This dynamic approach ensures that marketing efforts are both efficient and effective, adapting swiftly to market changes and consumer behaviors.



SALES AND MARKETING AI AGENTS

Analyzing Competitor Activities

AI agents can monitor competitors by analyzing publicly available data, such as website content, social media activity, and customer reviews. By identifying trends, strengths, and weaknesses in competitors' strategies, businesses can gain valuable insights to inform their own marketing and sales tactics. This proactive approach allows companies to stay competitive and responsive to market dynamics.



PROJECT



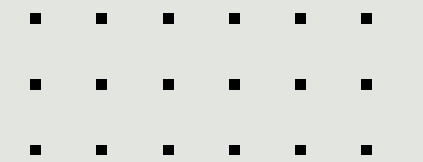
SESSION THREE

Refining and Planning Implementation

Objective: By the end of this session, you will have refined your solution and created an implementation plan.

Output of Session: A refined solution and a concrete implementation plan.

REVIEW AND SHARE (5 MINUTES)

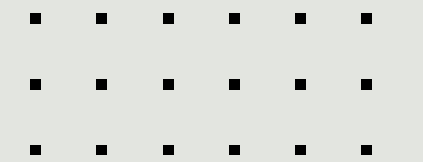


Share your AI solution from Session 2 with a partner or the group

- **What was your framed Problem?**
 - Example: "I wanted to respond to buyer inquiries faster."
- **What is your solution?**
 - Example: "I created a ChatGPT prompt to generate email responses for common buyer inquiries, such as questions about pricing and availability."
- **What is the sample output?**
 - Example: A follow-up email template or a draft property description generated during Session 2.



REFINE THE SOLUTION (10 MINUTES)



"What's the most time-consuming or stressful task in your business that slows you down or creates inefficiencies?"

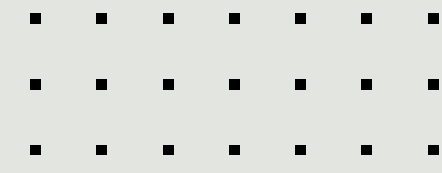
Let's think across the entire scope of your operations, including:

- Lead generation and conversion.
- Client communication and follow-ups.
- Listing and marketing properties.
- Analyzing market trends or project feasibility.
- Managing client inquiries and repetitive questions.

Activity

- Write down 1-2 challenges that you believe have the most significant impact on their workflow or business outcomes





CREATE AN IMPLEMENTATION PLAN (15 MINUTES)

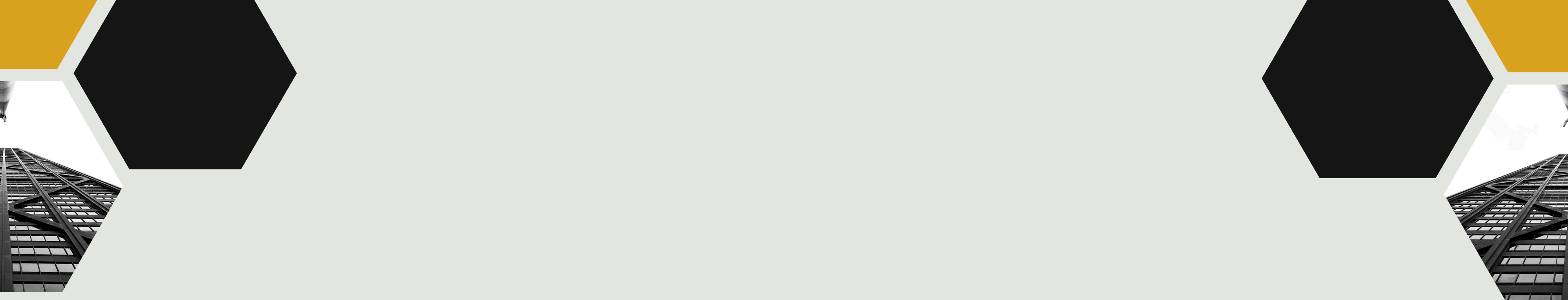
Framework

- **What's the challenge?** Clearly describe the problem.
 - Example: "I spend too much time responding to repetitive buyer inquiries."
- **What's the goal?** Define the desired outcome.
 - Example: "Respond to all buyer inquiries instantly without sacrificing personalization."
- **What's the current Process?** Outline how the task is handled today.
 - Example: "I manually reply to each email, which takes several hours a week."
- **How might AI help?** Identify how AI can improve or automate the Process.
 - Example: "Implement a ChatGPT-powered chatbot to handle FAQs automatically."

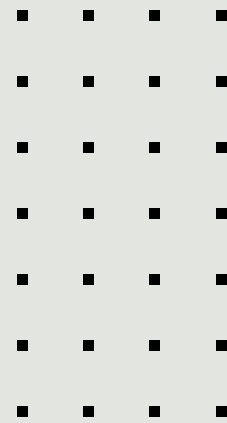
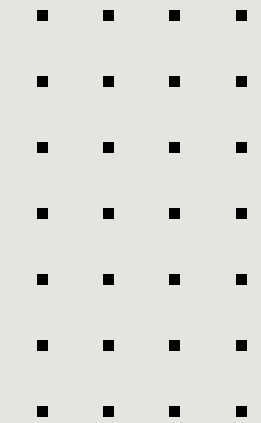
Activity:

- Apply the framework to your top challenge, expanding beyond the task level to a broader business challenge.



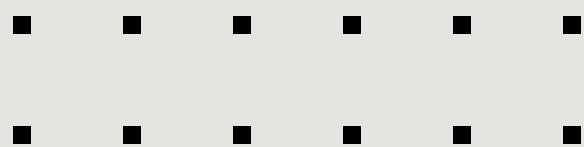


Q & A



KEY TAKEAWYS

AI AGENTS AND CHATBOTS STREAMLINE TRANSACTIONS, AUTOMATE FOLLOW-UPS, AND FREE REALTORS TO FOCUS ON CLOSING DEALS.



THANK YOU

**BE THE FIRST TO SCALE SMARTER!
LET'S TALK AI NOW!**



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