B Broker AI

Getting real work out of your AI.

You already have an AI assistant. It knows mortgages in general. It does not know *your* business — who you want, how you qualify, how you sound, or the lines you never cross. Broker AI is the profile that tells it. This guide is how to use the two together.

Set-up, once

1. **Connect it.** In Claude (the free plan is enough): `Settings → Customize → Connectors → + Add → Add custom connector`, name it Broker AI, paste the address from Settings → Connect Claude or ChatGPT, sign in, authorize. About two minutes. In ChatGPT (chatgpt.com, free or paid): `Plugins → Add → Add custom MCP server`, then the same paste, sign in, authorize; then open the plugin's Permissions and choose `Allow read-only tools`, or ChatGPT quietly refuses to record a check.
2. **Open a new chat and ask it something from page 3.** That's it — nothing to install, no file to keep in sync.

New to Claude? You're done.

If you've just made the account, it knows nothing about you except what's in your Broker AI profile — which is exactly what you want. Ask it anything on page 3 and it will answer from your business. **Skip the box to the right**; it doesn't apply to you.

Starting fresh is genuinely the easier way in.

Already use Claude? One habit.

If you've used it for other things, it may have built its own picture of you and will sometimes answer from that instead of reading your profile. It isn't broken — it decided it already knew, so it never looked. Open with **"Check my Broker AI profile — …"** and it reads the real thing, then keeps using it for the rest of that chat.

The tell: an answer that sounds generic, or describes some other business of yours. Say it again and re-ask.

Or untick **Memory** in the `+` menu on a new chat — same effect, that conversation only.

What it is actually reading

Your answers become 13 working files. Your AI reads all of them, every time.

GENERATED FROM YOUR PROFILE

```
icp-profile.md · lead-scoring-rubric.md · messaging-voice-guide.md · compliance-guardrails.md · referral-partner-playbook.md · campaign-blueprint.md · weekly-operating-checklist.md · custom-instructions.md · start-here.md · leads-tracker.csv · referral-partners-tracker.csv · config.json · README.md
```

Change an answer in the wizard and every one of them updates. There is nothing to re-download or re-paste.

Talking to it, if this is new

Five things that make the difference between a toy and a tool.

It's a conversation, not a command line.
There are no special words. Type the way you'd brief a sharp new assistant who has read every file about your business. “This lead came in, what do you think?” is a perfectly good prompt.

Paste things in.
An email, a form submission, a list of this week's leads, a lender's rate sheet. It reads what you paste and works from it. This is the single most under-used thing.

Correcting it is the point, not a failure.
“No — that's a Warm, not a Hot, because the renewal is nine months out.” Say it. Corrections are logged and the scoring gets sharper for *your* practice specifically. An AI you never correct stays average forever.

Ask for less.
Long answer you didn't want? “Shorter.” “Just the tiers.” “Skip the explanation.” It adjusts immediately and remembers for the rest of the chat.

One chat per job.
Keep a conversation going while you work on something — it keeps the context. Start a new one when you switch to something unrelated.

Three things it cannot do — by design

- **It cannot send anything.** No email, no text, no message leaves anywhere. It writes drafts; you send them.
- **It cannot make a lending or credit decision,** and it will not imply one. Scoring is about fit and timing — never creditworthiness.
- **It cannot spend your money.** Ad changes are prepared and wait for your approval in the dashboard.

What never goes in

Never put a client's name, email, phone number, address, income figure or credit score into anything you log. Broker AI stores *how you work*, never who your clients are — there is no database table here capable of holding it. When you log a deal, “Referral: Jen Okafor, refi, Fraser Valley” is the right level of detail.

Sizing up a lead

> `Score these leads from this week.`
> Paste them in. You get a tier for each with the reasoning shown, not just a label.

> `New lead: self-employed contractor, 3 years incorporated, wants to refinance and pull equity, renewal in 60 days. Worth my time?`
> Applies your fit signals and your urgency rules together.

> `What about someone looking for 92% on a rental?`
> It should say no. That's one of your disqualifiers, and a generic AI would try to be helpful instead.

> `Why did you score that one Warm and not Hot?`
> Makes the rubric visible. If you disagree, say so — that's the correction loop.

> `Any leads I marked differently than you scored?`
> The one that makes it better over time. Every correction becomes an example it uses next.

Writing to people

> `Draft a first-touch message for this lead.`
> In your tone, with your compliance lines already built in.

> `Write the follow-up I'd actually send.`
> Uses the writing samples in your profile. If drafts sound generic, that field is probably blank.

> `Same thing, shorter, and less salesy.`
> Iterate. The second draft is usually the one you send.

> `Is there anything in this I shouldn't send?`
> Checks the draft against your brokerage's rules — required wording, forbidden phrases, an unsubscribe line — and lists exactly what to fix.

> `Rewrite this for someone who's been declined once already.`
> Same voice, different situation. Tell it the situation and it adjusts.

> `Don't use that phrase again.`
> Say it and it's recorded. The third time the same phrase comes up, a rule is proposed on your dashboard. Approve it and no draft uses it again.

Referral partners

> `Which of my referral partners have I not spoken to lately?`
> Checks last-touch dates against your own cadence and names who's gone quiet.

> `Draft a check-in note to [partner] at [firm].`
> Uses what you recorded about that relationship, in your voice.

> `Log a referral touch for [partner].`
> Say it the moment you do it. This is what makes the question above work later.

> `Which partners have actually sent me funded business this year?`
> Separates the relationships that produce from the ones that are just pleasant.

Tracking what happened

This is the part brokers skip, and it's the only reason you'll ever know whether any of it worked. Say these the moment things happen — the timing itself is the measurement.

> `Log a new opportunity, source is Referral: [name].`
> Or “Google Ads”, “Past client”, “Open house”. No client details — just where it came from.

> `Mark [opportunity code] as contacted.`
> Also: qualified, application, submitted, approved, funded, declined, lost, withdrawn.

> `I just texted that lead — log the action.`
> Your dashboard's “time to first action” is built from this. A same-day text deserves a same-day log.

> `Record the outcome on [code] as funded, and yes/no on whether Broker AI actually helped.`
> “Not really” and “not sure” are correct answers when they're true. Honest beats flattering.

> `What's my business impact so far?`
> Opportunities, actions and outcomes in one summary, against your baseline.

> `Where did my funded deals actually come from this year?`
> Referrals vs ads vs repeat, with real counts. Usually the surprising one.

> `What should I prioritise this week?`
> Ranks what you've logged by staleness and urgency. Best Monday-morning question there is.

> `What has it caught?`
> Your dashboard keeps count: drafts checked, problems caught before sending, corrections you made, rules it learned from you. No draft is stored — only which rule fired.

Marketing and ads

> `Draft a campaign for my ideal clients.`
> Built for who you actually want, in the areas you actually serve, inside your stated budget.

> `Write three Google ad variants for self-employed renewals.`
> Native format and character limits per platform.

> `What's the going rate for cost-per-lead on refinance deals in my market?`
> Anonymous benchmarks from other brokers. Often the honest answer is “not enough data yet” — it will say so rather than invent one.

> `Check my ad performance and tell me what's not working.`
> Reads real spend and results once an ad account is connected. It prepares changes; you approve them.

On ad platforms: Google Ads is live today. Facebook is still in review with Meta — until that clears it works only for accounts with a role on our app. Nothing is ever changed or spent on your account without you approving that specific change in the dashboard.

Questions brokers actually ask

How do I register a lead?

Just say it: *"Log a new opportunity, source is Referral: Jen Okafor."* You'll get back a code like `OPP-2026-000012`. Use that code when you update it later. You never fill in a form, and you never put the client's name in.

Why does it sometimes not know something about my business?

Two reasons. Either your assistant answered from its own memory without reading the profile — say *"check my Broker AI profile"* and ask again — or that question is one of the ones you skipped in the wizard. Blank fields show up as generic answers. "Sharpen your profile" on your dashboard fills them in.

Does it learn from my corrections?

Yes, with your say-so. Each correction is recorded. The third time the same phrase comes up, a rule naming it is proposed on your dashboard with the dates and count. Nothing becomes a rule until you approve it.

My brokerage sent new compliance rules. How do I get them in?

Paste the document in and say *"add these to my profile."* It proposes the rules one by one — must include, never say, disclose when, escalate — each citing the document, for your approval. Every draft after that is checked against what you approved, and it says so: *"checked against your recorded rules,"* never "compliant."

Do I have to pay for Claude or ChatGPT as well?

For the live connection, yes — that's their charge, not ours, and it's a separate account. If you'd rather not, download your profile as a folder of files and use it with whatever you have. You can switch to the live connection whenever.

What happens to my client data?

It never reaches us. Real names, incomes and credit details stay inside your own conversation, on your own AI subscription. Broker AI stores configuration — how you work — and has no table capable of storing a client record.

What if it gets something wrong?

Tell it. "That's a Warm, not a Hot, because…" Corrections are recorded and the rubric improves for your practice specifically, not for brokers in general. This is the difference between this and a prompt you pasted once.

Can I use it on my phone?

Yes — the Claude and ChatGPT apps carry the same connection. Log a touch from the car after a coffee with a realtor; that's when it actually gets logged.

Does it work with ChatGPT, or only Claude?

Both, plus anything that supports MCP or can read a folder of files. Your profile moves with you if you switch — it isn't tied to whichever AI you started on.

What if I stop using it?

Your AI simply stops having that context. There's nothing to unwind, because there was never any client data here.

When something looks off

The answer is generic, or about the wrong business.
It didn't read your profile. Say *“check my Broker AI profile”* and ask again. In Claude you can also untick Memory on a new chat.

It says it can't check something you know is recorded.
Ask it directly: *“check my logged opportunities.”* It sometimes reasons from the profile text instead of looking at the live data.

Drafts don't sound like you.
The writing-samples question is blank. Paste two or three things you've actually written into that field — it's the single highest-value answer in the whole wizard.

It's slow on the first question.
First request after a quiet spell wakes the server. Later ones are quick.

It offers to do something and nothing happens.
Anything that sends, spends or changes something waits for you. Check the dashboard for pending approvals.

IF YOU ONLY REMEMBER FOUR THINGS

1. **Open with “check my Broker AI profile”** when the chat is new.
2. **Paste real things in** — leads, emails, lists. Don't describe them.
3. **Correct it out loud.** That's what makes it yours rather than generic.
4. **Log things as they happen.** Ten seconds each, and it's the only way you'll know later whether any of this helped.

Stuck on any of it, or something in here doesn't match what you're seeing — say so. Half of what's in this guide exists because a broker hit it first.

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