

AI TRAINING SERIES HANDOUT

The Big 3

ChatGPT, Claude, and Gemini: a practical getting-started guide for real estate professionals

This guide compares three widely used AI assistants and shows you how to set each one up, protect MLS and client data, and use copy-and-paste prompts for everyday agent work.

AI is a drafting and thinking partner. **You** stay responsible for facts, compliance, and the final decision.

Note: A new version of a large language model is happening every 18 days now, so there is not guarantee this information is accurate at the time of reading.

Last verified: October 1, 2026

YOU'LL LEARN TO

- Choose the right tool for a task
- Check plan, privacy, memory, and Workspace settings
- Use copy-and-paste prompts for everyday agent work
- Apply MLS data and Fair Housing guardrails

01 Choose the Tool for the Job

All three tools can help you draft, summarize, and brainstorm. Choose based on the work you are doing and the account you already use.

Tool	Best starting use	What to know now	Use with care
ChatGPT	Brainstorming, first drafts, quick rewrites, research support, and flexible back-and-forth conversations.	Free includes web search, file uploads, data analysis, and image creation, each with its own limits. Plus is \$20/month with higher limits and broader access.	Model names and feature lists change often. Check your own account instead of relying on a fixed list.
Claude	Longer documents, polished rewrites, structured checklists, and turning rough notes into clear language.	Free and paid plans include memory across conversations. Pro is \$20/month billed monthly, or \$17/month billed annually.	Review what memory keeps before you use it for client work.
Gemini	Work that starts in Google products, research planning, and drafting inside eligible Google apps.	Personal Google AI plans and Google Workspace offerings are separate. Features depend on account type, plan, language, and admin settings.	A personal plan does not carry over to a business Workspace account.

PRO TIP

Use AI to organize, draft, compare, and explain. Use your professional judgment to verify facts, confirm sources, protect confidential information, and make the final decision.

HEADS UP

AI can sound confident while being incomplete or wrong. Verify facts, numbers, dates, MLS fields, public remarks, contract terms, and compliance before anything is shared or submitted.

Source: [OpenAI: ChatGPT Free Tier FAQ](#)

Source: [Claude: Plans and pricing](#)

Source: [Google AI plans](#)

02 Before You Paste Anything: Data, Privacy & MLS Use

Consumer AI tools are third-party services. A paid individual subscription does not, by itself, make it permissible to use MLS or client data.

HEADS UP

MLS and client data. Before putting MLS compilation data or client information into any third-party AI service, confirm that the use is permitted by Hive MLS rules and applicable data agreements, your brokerage's policies, and your confidentiality obligations to the client. When in doubt, do not upload it. Use the minimum authorized information necessary, remove personal identifiers, and verify every output.

Always keep out of prompts

- Social Security numbers, bank or account numbers, loan applications, wire information, government ID numbers, and passwords.
- Unredacted client documents, private showing instructions, lockbox information, and other non-public listing data.

Check your privacy settings

Individual plans may use your chats to improve models unless you change the setting. Controls, defaults, and retention differ by platform and can change. **Turning off model training does not make confidential data safe to upload.** MLS rules, brokerage policy, copyright, confidentiality duties, and client permissions still apply.

ChatGPT

Find it: Settings > Data controls

Change: Turn off **Improve the model for everyone** to keep new chats out of training.

Temporary Chats are not used for training and do not create memories, but may be kept up to 30 days for safety. Rating a response with thumbs up or down can make that conversation eligible for training even after you opt out.

Claude

Find it: Settings > Privacy and Settings > Memory

Change: Turn off **Help improve our AI models** to keep new chats out of training.

Incognito chats are not used to improve Claude or update memory and are typically retained for 30 days. Review memory separately under Settings > Memory.

Gemini

Find it: At gemini.google.com, **Settings & help > Activity**

Change: Turn off **Keep Activity**, or choose **Turn off and delete activity**.

Even with it off, chats stay with your account for up to 72 hours. Turning it off also limits which connected apps work, and it does not delete past activity unless you choose to delete it.

Work accounts

Find it: Your brokerage or IT administrator

Change: Ask which AI tools, plans, and settings are approved before you use client information.

Business plans such as ChatGPT Business or Enterprise and Claude Team or Enterprise do not train on your content by default. Google Workspace protections and Gemini settings depend on your organization's license and administrator configuration.

Fair Housing and public-facing copy

Ask for factual, property-focused language. Do not ask AI to identify an "ideal buyer," characterize people or neighborhoods, steer consumers, rank schools, or make demographic or protected-class claims. Review every public-facing result yourself.

Source: [OpenAI: Data controls in ChatGPT](#)

Source: [Claude: Who can view my conversations?](#)

Source: [Google: Manage your activity in Gemini Apps](#)

03

ChatGPT

ChatGPT is a flexible conversational assistant for brainstorming, drafting, rewriting, analysis, and research-supported work. It is useful when you want to improve something quickly and keep refining it in the same conversation.

Get started

Step 1 Create an account.	Go to chatgpt.com and sign up with Google, Apple, Microsoft, or email.
Step 2 Use the same sign-in every time.	If a subscription appears to be missing, confirm you are signed in with the same account and sign-in method you used to subscribe.
Step 3 Add the mobile app (optional).	Install the official ChatGPT app by OpenAI from the Apple App Store or Google Play.
Step 4 Set your controls.	Review Settings > Data controls and Settings > Personalization > Memory before client work. Avoid saving sensitive client details to memory.

GOOD TO KNOW

- **Models change.** GPT-4o and several other models were retired from ChatGPT on February 13, 2026. Use the model picker in your account to see what is available.
- **Free** includes web search, file and image uploads, data analysis, image creation, and existing GPTs, each with its own usage limits.
- **Plus** is \$20/month with higher limits and broader model and tool access.
- **GPTs.** New GPT creation and publishing are not available on personal plans, including Plus. OpenAI has said it plans to retire custom GPTs.

PRO TIP

Start with the task, give it the authorized facts it needs, tell it what not to assume, and state the format you want. Keep refining one project in the same conversation, but do not treat a conversation as a permanent or complete record.

Two everyday prompts

Listing Description Draft

Use only facts you are authorized to provide. This creates a draft for your review, not an automatic MLS submission.

COPY-AND-PASTE PROMPT

Act as a careful real estate copy editor. Draft a factual, property-focused listing description from the notes below. Use only the information I provide. Do not invent features, measurements, upgrades, location benefits, school claims, or neighborhood characterizations. Avoid protected-class language, references to an ideal buyer, and subjective claims that cannot be supported. If a needed fact is missing, insert [NEED: fact]. Keep the description confident but not salesy. Output: (1) one neutral headline under 10 words, (2) two paragraphs of 60-80 words each, and (3) five short feature highlights. Notes: [PASTE AUTHORIZED FACTS HERE].

Seller Objection Responses

Use to prepare for a conversation. Supply only the market facts you can back up.

COPY-AND-PASTE PROMPT

Act as my calm, experienced listing coach. Give me three short responses to this seller objection: "[PASTE OBJECTION]." Context I can support: [PASTE AUTHORIZED FACTS OR LEAVE BLANK]. Each response must include an empathetic opening, one factual or logical point based only on my context, and one question that moves the discussion forward. Do not invent statistics. If data is needed, write [ADD: data needed]. Keep each response to three sentences or fewer.

HEADS UP

Before publishing, confirm Hive MLS public-remarks rules, brokerage requirements, factual accuracy, and Fair Housing compliance.

Source: [OpenAI: What is ChatGPT Plus?](#)

Source: [OpenAI: Retiring GPT-4o and other ChatGPT models](#)

Source: [OpenAI: Memory in ChatGPT](#)

04 Claude

Claude is useful for long source material, rewriting in a natural voice, turning rough notes into organized communication, and creating structured checklists or talking points.

Get started

Step 1 Create an account.	Go to claude.ai and sign in with the option offered for your account.
Step 2 Use the same sign-in every time.	This matters most if you used Apple Hide My Email or a workplace identity.
Step 3 Add the mobile app (optional).	Install the official Claude app by Anthropic.
Step 4 Set your controls.	Review Settings > Privacy and Settings > Memory before client work.

GOOD TO KNOW

- **Plans.** Claude Free is available. Pro is \$20/month billed monthly, or \$17/month with an annual subscription (\$200 billed up front).
- **Models change.** Available models, tools, and usage limits change. Check what your plan offers instead of relying on a fixed list.
- **Memory** across conversations is available on Free and paid plans. Review it under Settings > Memory, and turn it off or use an incognito chat for sensitive work.
- **Projects** organize chats and documents. Free currently allows up to 5 projects. Store only information you are authorized to keep there.

PRO TIP

For complex work, tell Claude the outcome you need and ask it to list any missing information before drafting. An uploaded document does not explain itself, so give a concrete task, scope, and output format.

Two everyday prompts

CMA Narrative for a Listing Appointment

Use a factual summary you are permitted to use. This is communication help, not an appraisal or valuation opinion.

COPY-AND-PASTE PROMPT

Act as an experienced listing agent and clear communicator. Turn my authorized CMA notes into a neutral, spoken explanation for a listing appointment. Use only the numbers and facts I provide. Do not calculate adjustments, estimate value, invent comps, or imply certainty. If a key number is missing, insert [NEED: number]. Explain any real estate term in plain English. Output: a natural 90-second spoken script followed by three concise backup talking points for a seller who questions price. CMA notes: [PASTE AUTHORIZED SUMMARY].

Rewrite an Email in My Voice

Use when the facts and commitments in your draft are already correct.

COPY-AND-PASTE PROMPT

Act as a real estate writing coach. Rewrite the email below so it sounds warm, direct, and professional without becoming generic. Keep the same subject, facts, commitments, and intent. Do not add information, promises, deadlines, or advice that is not in my draft. Keep it the same length or shorter. Avoid the phrase "I hope this email finds you well." Output: subject line and one polished email. My draft: [PASTE DRAFT]. My voice: [DESCRIBE TONE].

Source: [Claude: Plans and pricing](#)

Source: [Claude: Choosing a Claude plan](#)

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Gemini

Gemini is Google's AI assistant. It is especially convenient when your work starts in Google products, but the right setup depends on whether you use a personal Google Account or a managed Google Workspace account.

Get started

Step 1 Sign in.	Go to gemini.google.com and sign in with the Google account you intend to use.
Step 2 Confirm the active account.	If you use both personal and work accounts, check which one is active before you share information or subscribe to a plan.
Step 3 Ask about missing features.	If Workspace features are missing, ask your organization's Google Workspace administrator which Gemini offering and settings apply to your account.
Step 4 Set your controls.	Review Keep Activity and your connected apps before you use email, Drive, Calendar, or other account data.

GOOD TO KNOW

- **Plans change often.** Check Google's current plan page instead of a fixed comparison. Older guides that compare Gemini 2.5 models are out of date.
- **Google AI plans** (Plus, Pro, and Ultra) are for personal Google Accounts. A Workspace user needs the applicable Workspace offering, and an administrator may need to turn on features.
- **Gemini in Gmail, Docs, Sheets, Slides, and Meet** depends on plan, account type, region, language, and admin settings. Not every account gets the same in-app tools.
- **Connected apps** can share information from Google services with Gemini. Review them before using account data.

Two everyday prompts

Open House Follow-Up Email

Use a clean summary of your own notes. Do not paste attendee contact data or a raw MLS report.

COPY-AND-PASTE PROMPT

Act as a real estate agent's writing assistant. Draft a short follow-up email to open-house attendees. Use only the information below. Do not add turnout claims, property features, deadlines, price changes, or promises that I have not supplied. Keep it under 150 words and avoid generic automation language. Output: one subject line and one email. Property address: [STREET ADDRESS OR APPROVED REFERENCE]. Open-house date: [DATE]. My approved notes: [PASTE NOTES].

Neutral Offer Comparison

This explains stated terms. It is not legal advice and does not decide which offer is better.

COPY-AND-PASTE PROMPT

Create a neutral, plain-English comparison of the two offers below. Use only the stated terms. Do not recommend an offer, interpret contract language, predict enforceability, or give legal advice. Flag missing or unclear terms as [ASK: question]. Output: (1) a side-by-side table of price, financing, down payment, earnest money, contingencies, closing date, concessions, and special terms; (2) a short plain-English summary of each offer; and (3) three to five questions for the listing agent, broker, or attorney. Offer A: [PASTE AUTHORIZED TERMS]. Offer B: [PASTE AUTHORIZED TERMS].

Source: [Google AI plans](#)

Source: [Google Workspace: Manage access to Gemini features](#)

06

Before You Send or Publish: Final Check

Use this checklist after any AI-assisted draft, summary, comparison, or client-facing message.

Check	What to confirm
Source facts	Every address, price, date, feature, condition, statistic, and claim matches an authorized source.
Missing information	The draft does not fill gaps with assumptions. Missing details remain questions or placeholders.
MLS and data use	The data used was authorized for this provider and use, and no confidential MLS or client information was uploaded without permission.
Fair Housing & images	Language and images follow Fair Housing and Hive MLS rules: no protected-class, steering, ideal-buyer, school-quality, or demographic claims; AI-altered or virtually staged images include required disclosures and do not misrepresent the property.
Professional scope	No legal, tax, lending, appraisal, inspection, zoning, insurance, or other conclusions beyond supplied facts.
Human & brokerage	Reviewed before use; brokerage advertising, disclosure, and MLS requirements confirmed.

Official sources for future updates

- [OpenAI Help Center: ChatGPT plans, data controls, models, and memory](#)
- [Anthropic: Claude plans and pricing](#)
- [Google One: Google AI plans](#)
- [Google Workspace Help: Gemini administration and feature access](#)
- [Hive MLS Rules & Regulations](#)

HEADS UP

Model names, tool limits, plan access, prices, and privacy controls change often. Recheck the official sources above before relying on exact product details.

YOUR HOMEWORK

Before your next listing appointment, practice with one tool:

- Open the privacy settings in the tool you use most and confirm how training and memory are set.
- Run one prompt from this guide using a practice property or your own home, with no client data.
- Review the result against the Final Check table above.