



Send all Texas referrals our way!

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Task Automation Jumpstart

A done-with-you implementation guide for real estate agents

Use this guide to build one safe automation that returns time without giving up judgment, compliance, or client service.

Resource page: ClubWealth.com/AIErick

1. Start with the five-part automation brief

Part	Write your rule
Trigger	What event or schedule starts the work?
Facts	What email, CRM, calendar, Drive, property, or client facts are required?
Decision	What repeated judgment is being made?
Output	What should be prepared: summary, draft, label, task, or alert?
Approval	What must stay behind a human review?

2. Build the inbox reply queue

Copy and paste

Review unread email from the last 3 days and sent mail from the last 60 days. Identify up to 10 messages that need my reply. For each, show: sender, urgency, what they need, missing facts, and a draft in my normal style. Keep drafts direct, warm, and under 250 words. Use Calendar and Drive context if connected. Do not send, archive, label, or delete anything. Ask me to approve each action.

- Correction rule: when a draft misses your tone or a required fact, correct it once and tell the tool to apply that rule to future drafts. Examples: start with Hey, remove the closing, cite the property address, or ask when information is missing.

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3. Make the time savings recur

Scheduled check

Run this at 8:00 AM and 4:00 PM on weekdays. Alert me only when a message needs a decision, a deadline is within 48 hours, or a client is waiting. Keep all actions read-only unless I approve a draft or cleanup.

- If scheduling or connected email is unavailable, save the prompt and run it manually at the same two times. The process still works.

4. Build the Google Workspace Studio flow

1. Open Workspace Studio on a computer. Your organization must support Studio and allow Gemini access.
2. Paste the flow instruction below into Describe a task for Gemini and click Create.
3. Review the starter, every step, and the variables that pass information forward.
4. Run a test with a harmless sample message.
5. Turn it on only after the safe and escalation paths work.

Workspace Studio flow

Whenever a new email arrives from a lead, client, agent, lender, title company, inspector, or vendor, classify the sender and request. Extract the property address, timeline, question, and next action. Draft a reply in my voice using my Client Communication Rules in Drive. If it involves pricing advice, contract terms, legal issues, fair housing, threats, complaints, wiring instructions, or sensitive personal information, do not draft a final answer. Label it Agent Review and notify me in Google Chat. Otherwise save a draft, label it AI Draft Ready, and never send automatically.

5. Use email as the bridge from your CRM

Start with the lead-notification emails you already receive. The workflow can extract name, property address, source, stage, timeline, motivation, question, assigned agent, and next action. Add a direct CRM connector later only when volume and reliability justify it.

Extraction prompt

From this lead notification, extract only confirmed facts into this format: Lead name | Property address | Lead source | Assigned agent | Stage | Timeline | Motivation | Question | Missing information | Recommended next step. Do not infer missing facts. Then prepare a reply under 120 words and stop for approval.

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6. Give specialist tools one job

Perplexity: current research with sources

Reusable research shortcut

Research this question using current primary or authoritative sources. Show what changed, the effective date if relevant, what it means for a real estate agent, and what I still need to verify. Cite and link every material claim. Do not treat a summary as a substitute for reading the source.

Claude: repeatable skills and long-form work

Skill-builder brief

Help me create one repeatable skill for [TASK]. Define when it should run, the exact inputs, step-by-step rules, approved examples, required output format, and conditions that must stop for human review. Keep the skill focused on one workflow. Test it against one normal example and one exception.

7. Real estate guardrails

Safe to draft	Agent review required
Showing confirmations	Pricing or value advice
Routine status updates	Contracts, legal issues, fair housing
FAQ replies from approved rules	Complaints, threats, sensitive data
Meeting recaps and next steps	Wiring, payments, commitments

Non-negotiable: never let AI invent property facts, deadlines, approvals, or promises.

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8. Seven-day time-savings scorecard

Day	Workflow	Runs	Minutes saved	Correction or issue
1				
2				
3				
4				
5				
6				
7				

Seven-day rule: improve one workflow before adding another. Keep it only if it saves time, preserves accuracy, and produces a response you are willing to own.

Official product references

- [OpenAI inbox workflow](#)
- [ChatGPT scheduled tasks](#)
- [Apps in ChatGPT](#)
- [Gemini in Gmail](#)
- [Create a Workspace Studio flow](#)
- [Workspace Studio overview](#)
- [Claude Skills](#)
- [Perplexity scheduled tasks](#)
- [Comet Shortcuts](#)

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