

AI for Real Estate: Transaction Management

Hands-on AI workshop for real estate agents – using your contracts, your inbox & your calendar

Class Summary:

Agents rarely lose a deal at the showing — they lose it to a deadline buried on page four of an addendum or an inspection report no one read closely. This is a hands-on session: pull key dates and figures from a sample contract, turn an inspection report into a prioritized repair request, and build a transaction dashboard you keep. We'll also connect AI to your own files, email, and calendar — plus where it fails and what should never go into a chat window. Sample files included.

Topics

- Where AI genuinely helps in a transaction — and the three places it will confidently get you in trouble
- Client confidentiality and data handling: what never goes into an AI tool, and why
- Contract intake: extracting every date, dollar amount, and contingency from a purchase agreement and its addenda
- Deadline math agents get wrong — business days, observed holidays, and addenda that move dates earlier
- Connecting AI to tools you already use — your transaction documents, email, and calendar
- Building a transaction dashboard to continue using after class

Learning Outcomes:

- Run a complete contract intake on a sample purchase agreement and produce a dated, verifiable deadline list
- Catch at least one deadline the AI got wrong, and explain why it happened
- State the specific client information that must never be entered into an AI tool
- Connect at least one tool you already use — files, email, or calendar — to an AI assistant
- Leave with a working transaction dashboard and the prompts that built it
- Identify the single task in your own week to hand off to AI first

Prerequisites:

- A laptop is required. A phone or tablet will not work for this class — you will be opening, reading, and building files.
- A free Claude account is enough for most of the session. A paid account is recommended if you want to follow along with the tool-connection portion on your own computer
- Built for licensed agents, transaction coordinators, and brokerage staff. All sample contracts and inspection reports are provided and fictitious — please do not bring live client files.

About your presenter:

Barry Cunningham is the founder of Lowcountry AI Workshop and Charleston Media Group, and a licensed South Carolina real estate agent with The Boulevard Company. He now builds AI transaction dashboards and marketing systems for agents, teams, and brokerages across the Lowcountry, and teaches AI the way agents actually encounter it — on real paperwork, with real consequences, and with a clear line around what AI should never be trusted to do.

Vitals:

Cost:	\$99	Difficulty:	Beginner/Intermediate
Class time:	9:00am-12:00pm	Computer:	Required (laptop only - phone/tablet will not work)
Class length:	3 hours	Scholarships:	N/A
Class size:	20 persons		

Location: 4 Conroy Street, Suite A, Charleston, SC 29403 | Parking: Charleston Tech Center Garage