Get your business out of your head

(so AI can actually help)

My Business

1 **Write down how you work.**

2 **Put it in one folder.**

3 **Give Claude a brain to read.**

A guide for realtors. Loan officers, it works for you too.

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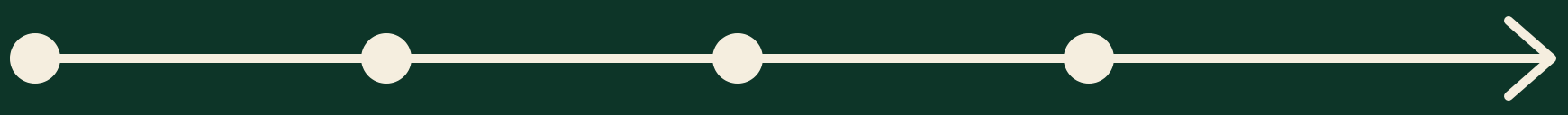
Checked Nov 25, 2026.

AI makes a clear process faster.



It makes a messy one messier.



AI can make what you already do better. It can’t invent a process you never wrote down.

If your follow-up lives in your head, AI has to guess, and it guesses with confidence.

So step one has nothing to do with AI. Write it down.

Your challenge: pick one thing you do over and over. You’ll write it up on the next page.

Write it like you're training a new assistant.

Pick one process. Fill in these four things.

1 **What starts it?**

(A form comes in. A buyer says yes. A showing ends.)

2 **Every step, in order.**

3 **Who does each step, and with what tool?**

(You, your assistant, Claude. Gmail, your CRM, your phone.)

4 **What does "done" look like?**

Stuck? Do the process once and write down what your hands do. That's the list.

Write it so someone who has never worked with you could follow it.

(A filled-in example is in the appendix.)

Most realtors run on five.

1 **New lead follow-up**

2 **Buyer consult**

3 **Listing appointment**

4 **Listing launch**

5 **Under contract to closing**

Start with one.

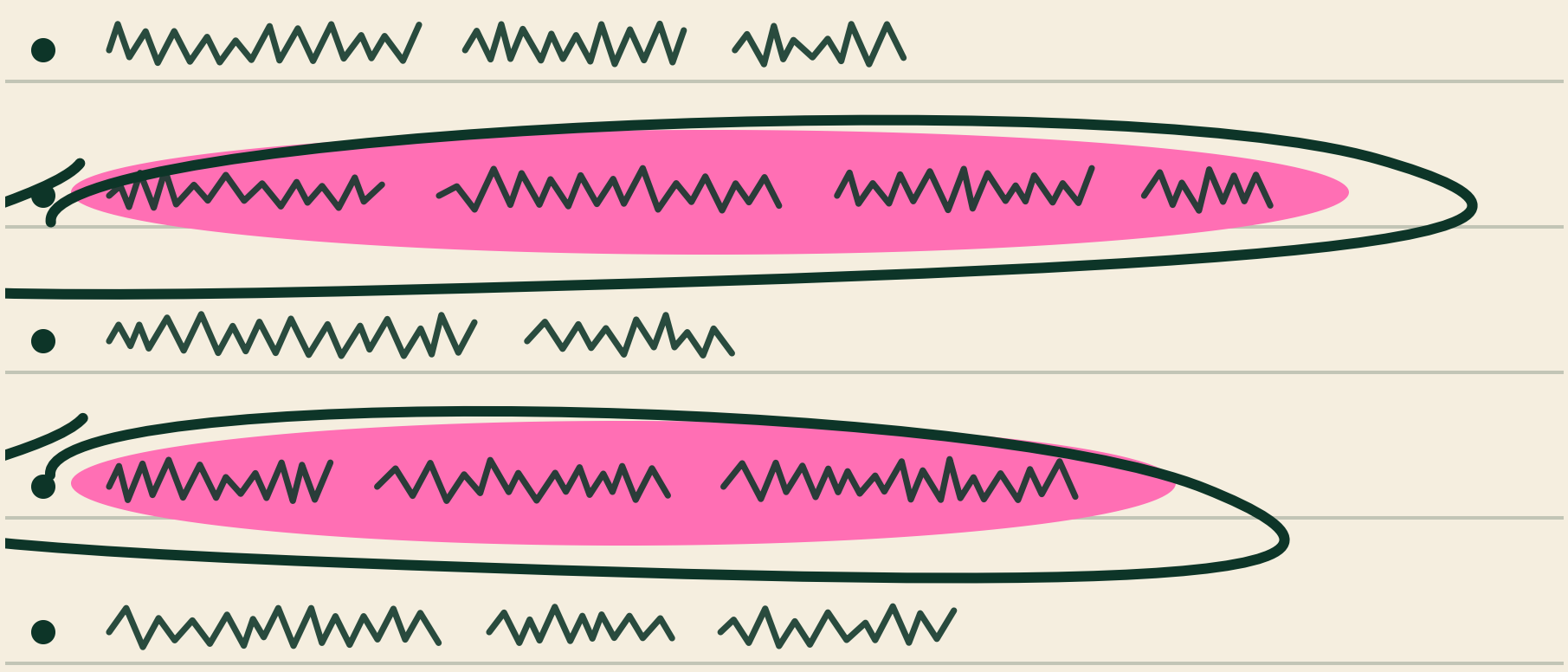
Pick the one that costs you the most when it goes wrong, or the one you do most often.

Loan officers: same idea, your own list. Start with how you follow up with a new lead and how you update your realtor partners.

Circle where it gets messy.

On your process, circle:

- ◯ Where you redo work
- ◯ Where you forget a follow-up
- ◯ The text you paste again and again



Those circles are where AI helps, once the process is on paper.

Two minutes. A pen is fine.

Say what you're building.

Finish these four lines.

Who I serve:

My area:

My goals this year:

How I talk:

(words I use, words I'd never use)

This is how Claude can tell whether a new process fits you.

Tip: for "how I talk," paste two real texts you sent that sounded like you. Take the names out first.

One folder. Five boxes.

Make one folder called **My Business**. Put it in Dropbox, Google Drive or iCloud, and keep it on your computer.

- My Business
  - Processes
    one file per process
  - Listings
    one folder per address
  - Buyers
  - Marketing
  - Templates
    save your page 3 questions here as `process-template.md`

Keep it on the computer, not just online.

Dropbox: right-click the folder, choose Make available offline.

Google Drive for desktop: in Preferences, under Folders from Drive, choose Mirror files. Google says mirroring “keeps a full copy on your computer.”

iCloud Drive (Mac): with Optimize Mac Storage on, Apple says your Mac can store documents in iCloud when it needs space. The switch is in System Settings > your name > iCloud > Drive.

Name it so you can find it. Leave some things out.

Name files with the address first, the date second.

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412 Birch Lane - Listing Agreement - 2026-11-25.pdf

Write the date year first (2026-11-25) so files sort in order.

What stays out of this folder:

× **IDs**

× **Bank statements**

× **Pre-approval letters**

Follow your brokerage's rules about client documents.

My rule: Claude can read everything in the folder you open. If it shouldn't read it, don't put it there.

Loan officers: your borrowers' files stay out too.

One file at the top. Named CLAUDE.md.



It’s a plain text file. Put it at the top of My Business.

Anthropic says Claude reads CLAUDE.md files at the start of every session. So when you start a session in your folder, your brain is already read.

Two honest notes, from Anthropic’s page:

1. Claude treats it as instructions it reads, not a lock.
2. Keep it under about 200 lines. Claude follows a longer file less closely.

Spell it exactly: CLAUDE.md, capital letters.

Four things go in the brain.

1 **Who you are and what you're building.**
(Page 6.)

2 **Every process, and where it lives.**
(A short list with file names.)

3 **Your rules.**
("Never send anything without my OK." "Spanish for Spanish-speaking clients.")

4 **How to start a new process.**
(The recipe on the next page.)

A short sample, for a made-up agent:

CLAUDE.md

```
1  Dana Lopez, Demo Realty. I help first-
   time buyers in Maple Grove.
2  Processes:
   Processes/new-lead-follow-up.md
3  Rule: draft only, I send.
4  Rule: no rates, loan amounts or
   approvals in anything I send.
```

The full sample is in the appendix. Copy it and change the details.

Say it once.
Never explain it twice.

You type:

```
Start a new process for open
house follow-ups.
```

Because the brain says how, Claude can:

WHAT	ask what starts it and what “done” looks like.
WHY	check it against your intentions.
HOW	use your page 3 template.
WHERE	save it in Processes, and add it to the list in your brain.

You write the recipe into the brain once.

Watch out: Claude follows the brain as instructions. Read what it saves before you trust it.

(This is an example of the idea. Your results will depend on what you put in the brain.)

Open your folder in Claude.

You need a paid plan.

Anthropic says Claude Code needs Pro, Max, Ultra, Team or Enterprise. Its pricing page shows Pro at $20 a month on monthly billing (read Nov 25; check today's price).

1. Download the Claude desktop app from Anthropic (Mac or Windows) and sign in.
2. Click **Code** at the top of the sidebar.
3. Under the prompt box, click the first control. Choose the top entry in the **Local** group.
4. Click the folder control next to it. Choose **Open folder...** and pick **My Business**.
5. In the same row, set the permission mode to Manual, so Claude asks before it changes a file.

Anthropic built the Code tab for coding. I use it on a business folder.

Try these on day one.

1. Read my processes and tell me which steps are missing or unclear.

2. Based on my intentions, which process should I write down next?

3. Start a new process for ____.

Want help setting yours up?

Book a free call.

julianmaldonado.com/call

Two quick questions first. Right now my calls are for realtors and loan officers in Minnesota. If that’s not you, the page shows you where to start.

or message me on Instagram @julianmaldonado.ai

Checked Nov 25, 2026 on Anthropic’s own pages and on Dropbox, Google and Apple help pages. Screens change. If a button moved, message me and I’ll fix this page. This is my method, not Anthropic’s. An independent guide, not made by Anthropic. Not legal or business advice. Follow your brokerage’s rules.

@julianmaldonado.ai

Appendix A. Sample process

(page 3, filled in for a made-up agent)

Made up: Dana Lopez, Demo Realty. Copy it, then replace everything with your own.

```
PROCESS: New lead follow-up
Owner: Dana Lopez, Demo Realty
Last updated: 2026-11-25

1. WHAT STARTS IT
A new lead comes in from my website form,
Zillow, or a text from a past
client's friend.

2. EVERY STEP, IN ORDER
   1. Add the lead to my CRM within the
      hour. (Dana, CRM)
   2. Draft a first text that uses their
      name and what they asked about.
      (Claude drafts, Dana sends)
   3. Send the text. (Dana, phone)
   4. If no reply in 2 days, send a short
      check-in text. (Claude drafts,
      Dana sends)
   5. If no reply in 5 days, send an email
      with 3 helpful links for their area.
      (Claude drafts, Dana sends, Gmail)
```

6. If still no reply, set a reminder to try again in 30 days. (Dana, calendar)
7. When they reply, book a buyer consult. (Dana, calendar)

3. WHO DOES WHAT, WITH WHAT
Dana: sends everything, books everything.
Claude: drafts texts and emails, and tells Dana who is due for a check-in.
Tools: CRM, phone, Gmail, Google Calendar.

4. DONE LOOKS LIKE
The lead has booked a consult, said "not now," or hit the 30-day reminder. Their status in the CRM is updated.

WHERE IT GETS MESSY (my circles)
- I forget the day-2 check-in when I'm showing homes.
- I paste the same first text every time.

Appendix B. Sample brain

(page 10, for a made-up agent)

Made up: Dana Lopez, Demo Realty. Save it as **CLAUDE.md** at the top of My Business.

```
# My Business: Dana Lopez, Demo Realty

## Who I am
I'm Dana Lopez, a realtor at Demo Realty.
I work with first-time buyers and a
few sellers.

## My intentions
- Who I serve: first-time buyers and the
  families who refer them.
- My area: Maple Grove and the towns next
  to it.
- My goals this year: list more homes,
  answer every lead the same day, stop
  losing leads to slow follow-up.
- How I talk: friendly, plain, short. I
  say "let's figure it out." I never use
  "dream home," "stunning," or "don't
  miss out."
```

```
## My folder
- Processes/: one file per process
- Listings/: one folder per address
- Buyers/
- Marketing/
- Templates/ (process-template.md is the
  one for new processes)

## My processes
- New lead follow-up:
  Processes/new-lead-follow-up.md
(Add each new process here the moment
it's saved.)

## My rules
- Never send, post or book anything. Draft
  it, and I'll send it.
- No rates, loan amounts or approvals in
  anything I send.
- Spanish for Spanish-speaking clients.
  Tell me when a draft is in Spanish so I
  can check it.
- Name files with the address first, the
  date second: 412 Birch Lane - Listing
  Agreement - 2026-11-25
```

```
- IDs, bank statements and pre-approval
  letters don't belong in this folder. If
  you see one, tell me and don't open
  it again.
- Never delete anything. Move old files to
  a folder called Archive.
- Show me a draft and wait for my OK
  before you save a new file.

## How to start a new process
When I say "start a new process for ___":
1. WHAT: ask me what starts it and what
   "done" looks like. One question at a
   time. Don't guess.
2. WHY: check it against my intentions
   above. Tell me plainly if it
   doesn't fit.
3. HOW: use Templates/process-template.md
   (what starts it, every step in order,
   who does each step and with what tool,
   what done looks like).
4. WHERE: after I OK the draft, save it in
   Processes/ with a clear file name, then
   add it to "My processes" above.
```