

SAMPLE REPORT · OAK & VALE PROPERTY PARTNERS



Property AI Opportunity Review

A clear example of how ClearAi would identify practical AI opportunities, prioritise a safe first step and outline what implementation could involve.

Designed for non-technical teams

Every section explains what it means, why it matters and what decision it supports.

Focused on one first implementation

The example shows a viewing-follow-up assistant with realistic effort, cost and guardrails.

Prepared as a public sample by ClearAi · hello@clearaihelp.com · Example company: Oak & Vale Property Partners.

A clear route through the recommendation.

This sample report is structured for a busy owner, director or manager who wants the conclusion, the reasoning and the next step without unnecessary technical detail.

1. Summary

Gives the practical conclusion first. Use this if you only have five minutes and need the headline decision.

2. Workflow map

Shows where AI could help in everyday work. It separates "AI can draft or organise this" from "a person still approves this".

3. Scorecard

Compares opportunities using the same simple criteria. This stops the loudest idea winning just because it sounds exciting.

4. First implementation

Turns one recommendation into a practical build example. This includes what would be built, what it needs, and rough time/cost bands.

5. Guardrails and roadmap

Shows how to test safely and what to do next. This is the difference between a useful pilot and random AI experimentation.

EXECUTIVE SUMMARY

The best first AI move is viewing-follow-up assistant, not trying to automate the whole business.

For Oak & Vale Property Partners, The safest useful opportunity is to improve follow-up speed and listing admin while keeping advice, negotiation and compliance-sensitive communication human-led. AI can draft and organise, but people should approve anything that affects a client relationship or property claim.

BEST FIRST PILOT

1

Viewing follow-up pilot.

LIKELY SETUP TIME

1-2

working days for a controlled no-code first version once source material is ready.

EXTRA TOOL COST

Low

usually licence-led for a no-code route; confirm pricing before quoting.

Plain-English conclusion

Start with one repeatable admin-heavy workflow where the business already has good source material. Keep AI away from final decisions, commercial promises and sensitive exceptions until the team has tested it properly.

WORKFLOW OPPORTUNITY MAP

Where AI could help estate agency, lettings and property teams.

This section explains each opportunity in simple terms. It also shows the human control point, because AI should support the team rather than quietly take over important decisions.

WORKFLOW	WHAT AI WOULD DO	WHAT THIS MEANS / HUMAN CONTROL
Viewing follow-up drafts	Turn viewing notes into helpful follow-up drafts and next-step reminders.	Human control: Negotiator approves before sending.
Listing copy support	Draft property descriptions from approved fact sheets and photography notes.	Human control: Branch manager checks facts, claims and tone.
Valuation pack summary	Summarise comparable notes, area highlights and action points for internal prep.	Human control: Valuer confirms figures and advice.
Vendor/landlord update draft	Create clear update drafts from activity notes and feedback themes.	Human control: Account owner approves all client-facing wording.
Market update content	Draft local market insight posts from approved data and branch commentary.	Human control: Marketing checks data source and compliance boundaries.

OPPORTUNITY SCORECARD

Why viewing follow-up pilot comes first.

The scorecard is a simple prioritisation tool. It does not say what is "coolest"; it says what is useful enough, realistic enough and safe enough to test first.

How to read the scores

Impact means how much time or quality could improve. **Ease** means how quickly it can be tested. **Risk** means how careful we need to be. **Readiness** means whether the business already has the right material and owner.

Important note

Risk is not a reason to avoid AI completely. It tells us where to add approval points, source rules and boundaries before anyone relies on the output.

OPPORTUNITY	IMPACT	EASE	RISK	READINESS	SCORE	WHAT THIS MEANS
Viewing follow-up drafts	5/5	4/5	2/5	5/5	88	Strong first pilot: valuable, repeatable and based on material the team already controls.
Listing copy support	4/5	5/5	2/5	4/5	84	Good candidate, especially when source facts are clean and easy to check.
Vendor/landlord updates	4/5	4/5	3/5	4/5	77	Useful, but more sensitive because it affects ongoing client relationships.
Valuation pack summary	3/5	3/5	4/5	3/5	60	Possible later with stronger controls; not the safest first move.

RECOMMENDED FIRST IMPLEMENTATION

Build a viewing-follow-up and listing-copy support assistant.

This section shows how one recommendation becomes something practical. The goal is not to remove people from the decision. The goal is to give the team a safer starting draft or summary using approved business knowledge.

What the assistant would do

One branch, two negotiators and a controlled set of viewing-note templates for follow-up drafts. It would produce a first draft, summary or checklist plus a short note showing what a human must verify before use.

Good use

Turn approved viewing notes into a same-day follow-up draft and next-step reminder for a negotiator to review.

Not allowed

Give valuation, mortgage or legal advice, negotiate an offer, invent property features, or send client messages without approval.

IMPLEMENTATION DETAIL

What needs to be built, in normal language.

1 Create the approved source pack

Collect the material the assistant is allowed to use: viewing-note templates, property fact sheets, approved tone examples, branch process notes, listing rules and escalation guidance.

Why it matters: the assistant is only as safe as the material it is given.

2 Write the working instructions

Define the assistant's role, output structure, tone, checks, escalation rules and the line it must not cross.

Why it matters: this keeps outputs consistent and makes review easier.

3 Test against realistic examples

Run 10-15 typical tasks and mark outputs as usable, needs edit, wrong, or unsafe.

Why it matters: this reveals gaps before the team relies on it.

4 Create a human review checklist

Every output should be checked for facts, evidence, tone, compliance, missing context and unsupported claims.

Why it matters: the review checklist is the safety net.

5 Run a small live pilot

Use it on one low-risk workflow first, then review time saved, quality, corrections and risks.

Why it matters: the business learns before scaling.

INDICATIVE EFFORT AND COST

What extra build time and cost might be needed?

These are example bands for the sample report, not a fixed quote. A real proposal should confirm software pricing, user numbers, data sensitivity and whether the client already has suitable AI licences. ClearAi implementation support would be scoped separately, because setup, build, testing and pilot management all require hands-on support.

Option A · fastest**No-code follow-up Custom GPT**

Build time: around 1-2 working days once source documents are ready.

Extra platform cost: usually low if the client already has a suitable paid AI workspace; otherwise expect per-user subscription costs to be checked at proposal stage.

ClearAi support: additional setup and pilot-management costs would apply for source-pack preparation, configuration, testing and handover.

Best for: one branch, a small negotiator group and controlled viewing-note templates.

Option B · stronger control**Private branch assistant / CRM-adjacent workflow**

Build time: around 5-10 working days for a more controlled version with login, document handling and clearer audit trail.

Extra platform cost: hosting/API usage depends on volume; usually needs a small monthly operating allowance plus build cost.

ClearAi support: additional build and management costs would apply for tool design, implementation, QA, documentation and rollout support.

Best for: multi-branch rollout, client-data controls, CRM workflow or stronger compliance tracking.

Recommended route for Oak & Vale Property Partners

Start with Option A for internal draft support only. ClearAi setup and pilot-management support would be additional to any subscription, CRM or hosting costs.

The rules that keep the pilot useful and safe.

AI must not provide legal, financial or valuation advice.

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Check all property facts, prices, tenure, availability and claims before publication.

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Keep client data inside approved systems and avoid public tools for sensitive notes.

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Escalate complaints, offers and negotiation points to humans.

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How the business moves from one useful pilot to a proper plan.

30 days

Run viewing follow-up drafts with one branch and a simple approval checklist.

Decision at the end: keep, improve, scale or park it.

60 days

Add listing copy support using approved property fact sheets only.

Decision at the end: keep, improve, scale or park it.

90 days

Review whether vendor/landlord update drafts improve communication without adding risk.

Decision at the end: keep, improve, scale or park it.

What ClearAi would give the client next

A practical pilot brief, source-pack checklist, assistant instruction set, human review checklist and simple success tracker.

Simple explanations for the terms in this report.

▼ **Would this advise buyers or sellers?**

No. It drafts admin support material for a human to check. Advice, offers and negotiation stay human.

▼ **Why viewing follow-up first?**

It is frequent, time-sensitive and easy to review, so the team can learn quickly without taking on high-risk automation.

▼ **What details must be checked?**

Property facts, tenure, availability, price, claims, client context and anything compliance-sensitive.

▼ **What would make the cost higher?**

More users, sensitive data, integrations, login requirements, audit trail, private hosting, complex document handling or the need to connect to internal systems.

Want a version of this for your business?

ClearAi can review your real workflows, score the best opportunities and give your team a safe first pilot to test.

[Email ClearAi →](#)

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About this sample

Oak & Vale Property Partners is an example company profile created to show the type of thinking and output a ClearAi review could provide. A live client report would be based on confirmed workflows, documents, interviews and business priorities.

1. Confirm the workflow

Pick one repeatable task, one owner and one safe review point before building anything.

2. Prepare the source pack

Gather the approved wording, examples, rules and documents the assistant is allowed to use.

3. Run the pilot

Test with realistic examples, record corrections and decide whether to improve, scale or stop.

What ClearAi keeps deliberately human

Final approval, commercial promises, sensitive decisions, client commitments and anything the source pack cannot prove.