

AI × CRE · SESSION 5

CRE Copilot Prompt Pack

Prompts you can steal, paste, swap in your details, make them your own

A leave-behind from Session 5 · Ashley Pyle, Chief Experience Officer, GadellNet

These are yours to use. Paste one into Copilot, swap in your details, and tweak until it sounds like you. On Premium you can point Copilot at your own files and emails; on Basic, just paste the text in. And always give the result a final read, you're the expert in the loop.

How to use these

A quick note on Basic vs Premium

Prompts marked (Premium) work best when Copilot can see your files. Attach and it reads them directly. On Basic, just paste the content in and you'll get most of the way there. Everything else works on either tier.

Starter moves for everyone

Summarize before you read

COPY & PASTE

You're my analyst. Read the [document / email thread] below and give me the 5 things that actually matter for [my goal], as short bullets, then one line of "so what." Flag anything I should double-check. [Paste text]

Tip Perfect for a long lease, a dense report, or a runaway email thread. Then read the source for the five things it flags.

First draft from notes

COPY & PASTE

Turn these rough notes into a [polished email / summary / post] for [audience]. Keep it [tone] and under [length]. Before you write, ask me anything you need. Notes: [paste]

Tip Letting it ask questions first almost always gets you a better draft. Answer them and watch the quality jump.

Meta-prompt for when you're stuck

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I want to use you for [task] but I'm not sure how to ask. Break it into steps and tell me exactly what to include in a strong prompt for this.

Tip When you don't know how to ask, ask it how to ask. It'll hand you a sharper prompt than you'd have written yourself.

Repurpose one into three

COPY & PASTE

Take this [case study / update] and give me three versions: a LinkedIn post (hook + 3 bullets + CTA), a short client email, and a one-paragraph blurb. Our voice is [describe]. Source: [paste]

Tip One good win, three places to use it. Describe your voice so all three actually sound like you.

Brokers & business development

Listing description

COPY & PASTE

You're a CRE marketer. Write a listing description using only the facts below; lead with [location / access / amenities]. Give me a 75-word and a 150-word version. Facts: [paste fact sheet]

Tip Feeding it only the facts keeps it honest, no invented amenities. Get both lengths and pick the fit.

Prospecting email

COPY & PASTE

Draft a short, warm prospecting email to a [role] at a [company type] about [property / service]. One clear CTA, no fluff, under 120 words. Context: [paste]

Tip Short and warm beats long and polished. One clear ask, and give it real context so it never reads as generic.

Market report to client bullets

COPY & PASTE

Summarize this market report into 5 client-ready bullets plus 2 talking points for a call. Plain English, no jargon. [paste/attach] (Premium: attach the file instead of pasting.)

Tip Turns a 30-pager into something you can actually say on a call. On Premium, attach the file and let Copilot read it.

Tour follow-up

COPY & PASTE

Write a follow-up email after a tour with [prospect]. Recap what they liked, answer [their question], and propose a next step. Notes: [paste]

Tip Send it while the tour is still fresh. The recap of what they liked does the selling for you.

Asset & property managers

Meeting recap

COPY & PASTE

Summarize this meeting: decisions, action items with owners and due dates, and any risks. Then draft a short follow-up email to the team. [paste/attach transcript]

Tip Owners and due dates are where the value is. Check them against what you remember before you hit send.

Tenant notice

COPY & PASTE

Draft a professional, courteous tenant notice about [topic, e.g., scheduled maintenance] at [property]. Include date/time and who to contact. Details: [paste]

Tip Courteous and clear, every time. Just double-check the date, time, and contact before it goes out.

Rent-roll summary (Premium)

COPY & PASTE

Analyze this rent roll: total occupancy, expirations in the next 12 months, and the top 3 tenants by rent. Put it in a clean table. [attach]

Tip Premium can read the file directly. Always eyeball the expirations and totals against the source.

Owner report

COPY & PASTE

Outline this month's owner report for [property] – occupancy, financial highlights, leasing activity, capital projects, issues. Then draft the leasing section from these notes: [paste]

Tip Let it build the skeleton, then fill the sections you know cold. The blank page is gone.

Marketing & BD

Newsletter from wins

COPY & PASTE

Draft our monthly newsletter from these updates. Sections: intro, 3 highlights, one client spotlight, a CTA. Voice: [describe]. Material: [paste]

Tip Hand it your wins, get back a structured first draft. Then make the voice unmistakably yours.

Event promo

COPY & PASTE

Write a LinkedIn post and a short invite email for [event] on [date]. Benefit-led, one CTA. Details: [paste]

Tip Lead with the benefit, keep one clear CTA. A post and an email in a single pass.

Boilerplate polish

COPY & PASTE

Tighten this company boilerplate into 60- and 100-word versions. Don't add any claim that isn't in the source. Source: [paste]

Tip Asking it not to add any claim that isn't in the source is how you keep it accurate.

Legal

First pass, not legal advice.

These give you a faster starting point: a clean abstract, a diff, a dates list. They don't replace your review or your judgment. You verify everything, and nothing here leaves the lawyer out of the loop.

Lease abstraction

COPY & PASTE

You're a CRE analyst. Abstract this lease into a clean table: Property, Tenant, Landlord, Lease type, SF, Term, Commencement, Expiration, Base rent, Escalations, Renewals, Security deposit, Permitted use, Notable clauses. Flag anything unusual or that a human must verify. Ask me anything before you start. [attach lease]

Tip A first pass to speed you up, never a substitute for your read. The "flag anything unusual" line is doing real work here.

Clause comparison

COPY & PASTE

Compare these two versions of [clause]. Show the differences in a table (Version A / Version B / What changed / Why it matters). Just surface differences, no legal advice. [paste both]

Tip Great for spotting what moved between drafts. It surfaces the differences; you decide what they mean.

Key dates & obligations

COPY & PASTE

From this agreement, list key dates, deadlines, renewal/termination windows, and ongoing obligations in a table. Mark anything ambiguous for my review. [attach]

Tip Perfect for a tickler list — anything it marks ambiguous is your cue to look closer.

Lenders, finance & analysts

Offering memo to one-pager

COPY & PASTE

Summarize this offering memorandum into a one-page snapshot: property, price, key metrics, tenancy, risks, and 3 questions I should ask. [attach]

Tip The “three questions I should ask” line is the gold. That's your diligence starting point.

Deal comparison matrix

COPY & PASTE

Compare these [3] deals side by side in an Excel table — a column per deal, rows for the key metrics, plus a 'flags / verify' row. [attach/paste]

Tip A clean column-per-deal view in seconds. The 'flags / verify' row keeps you honest.

Credit-memo outline

COPY & PASTE

Outline a credit memo for [borrower/deal], then draft the executive summary from these facts: [paste]. Note any assumptions I should confirm.

Tip Let it frame the memo and draft the summary. Then pressure-test every assumption it names.

Owners & principals

Board prep

COPY & PASTE

Turn this deck and these financials into 8 board talking points and 3 likely questions with suggested answers. Keep it high-level. [attach]

Tip Talking points plus likely questions means you walk in ready. Keep it high-level and human.

Weekly digest (Premium)

COPY & PASTE

Summarize my last week of emails on [project] into: decisions made, open items, and what needs me. [On Basic: paste the threads]

Tip Premium can pull this straight from your inbox. On Basic, just paste the threads in.

Market scan

COPY & PASTE

Give me a quick, sourced scan of recent news on [market / asset class]. Cite links and flag anything uncertain. Then 3 implications for us.

Tip Ask for links and click them — a sourced scan you can trust beats a confident guess.

Make them your own

These are starting points, not scripts. The [brackets] are yours to fill, and the wording is yours to update. The best prompt is the one that sounds like you asking a sharp colleague for help, so edit freely until it does.

The golden rules

- **Verify everything.** Copilot is a fast, confident first drafter, not the final word. You are.
- **Give it only the data it needs.** Selective and relevant, not your whole inbox.
- **If you wouldn't post it publicly, don't put it in free consumer AI.** Signed in with your work account, Copilot keeps your data protected – that's the safe place for work content.
- **You decide.** It predicts; you judge!

Now go make Copilot earn its keep.

— Ashley