



EDMUND'S
MASTERMIND

NOTION FOR REALTORS

HOW TO USE IT TO MAXIMIZE PRODUCTIVITY



Build your realtor operating system.



Templates, workflows, and dashboards that **save hours** every week.



Run listings, leads, follow-up, and content from **one place**.





SAVE TIME
Automate repetitive tasks and follow-up.



STAY ORGANIZED
Centralize everything in one system.



MANAGE LISTINGS
Track every detail from list to close.



TRACK CLIENTS
Stronger relationships. Better results.



SCALE PRODUCTIVITY
Systemize your business and grow with ease.



Realtor Command Center
All your real estate, clients, and content. Organized. Automated. Scalable.

Lead Pipeline

New Lead	Contacted	Qualified	Appointment
12	8	5	4

Listings Tracker

Property	Status	Price	Stage
123 Ocean Blvd	Active	\$2,495,000	Marketing
456 Palm Ave	Under Contract	\$1,895,000	Contract
789 Sunset Dr	Coming Soon	\$1,650,000	Prep
321 Bayview Ln	Sold	\$2,100,000	Closed

Buyer Tasks

- ☒ Pre-approval
- ☒ Home search
- ☐ Tour properties
- ☐ Make offer
- ☐ Inspection
- ☐ Finalize loan

Content Calendar

May 2023

S	M	T	W	T	F	S
27	28	29	30	1	2	3
4	Market Update	7	8	New Listing	10	
11	Just Sold Post	14	15	Client Testimonial	18	
19	20	21	22	23	24	

Open House Planner

123 Ocean Blvd
Sat, May 24, 2023
12:00 PM - 3:00 PM
3 Agents Scheduled

Transaction Checklist

- ☒ Contract Signed
- ☒ Disclosure Delivered
- ☒ Earnest Money
- ☒ Inspection Scheduled
- ☐ Appraisal Ordered
- ☐ Closing Scheduled

Client CRM

Amelia & Mark - Buyers
The Andersons - Sellers
Ryan Thompson - Investor
Emily Carter - Buyers

ONE SYSTEM. EVERY AREA OF YOUR BUSINESS.
Work smarter. Close more. Live better.
THAT'S THE POWER OF NOTION.

EDMUND'S MASTERMIND • AUGUST 7, 2026

NOTION FOR REALTORS

COMPLETE IMPLEMENTATION WORKBOOK

How to Use It to Maximize Productivity — Build Your Realtor Command Center

"Because Paying for Chaos is NOT an Option!"

YOUR MONEY-MAKING MISSION

PAID SEATS NEEDED

1

yours — the only seat this entire system requires

A GUEST COSTS

\$0

TC, photographer, lender, clients — page access, never a seat

MONTHLY PREMIUM

+20%

\$24 vs \$20/seat — the annual toggle most agents never notice

DEADLINES / DEAL

15+

inspection to closing — one calendar, zero sticky notes

The 3 Systems Built Today

1 The Deal Pipeline HQ

One Deals database, seven stages from Listing Prep to Closed. Every offer, counter, contingency, and closing deadline is a dated property on one board.

2 The Listing & Marketing Engine

A Listing Launch template: type the property facts once, and Notion AI drafts the description, captions, open-house kit, and email blast — in your voice.

3 The AI Maximizer & Billing Defense

Squeeze everything out of the AI you're paying for — then lock the billing: right plan, annual toggle, guests-not-members, quarterly seat audit.

Realtor Command Center vs. App Chaos

METRIC	SIX APPS	ONE HQ
Where's that deadline?	Search 4 apps	One calendar
Listing launch copy	9 PM, from scratch	60-sec draft
Negotiation history	Texts + memory	Logged + AI brief
Monthly software bill	Grows quietly	1 seat, audited
Assistant's ramp-up	Months	Days — it's all there

The Rule: Members pay. Guests don't. One workspace, one paid seat, annual billing — everyone else rides along at \$0.

What You'll Leave With Today

- ☐ **A built Deals database** — 7 stages, the deadline block, 4 views
- ☐ **The Listing Launch template** — facts in once, seven deliverables out
- ☐ **18 copy-paste AI prompts** — six per system, with expected outputs
- ☐ **The Billing Guide** — every plan, every gotcha, the exact math
- ☐ **The 30-day plan** — pipeline week 1, engine week 3, lock-in week 4
- ☐ **Your signed commitment contract** — Deals live within 48 hours

How to use this workbook: page 3 is your Notion 101 primer — start there if Notion is new to you. Pages 4–14 are the three systems (overview → prompts → reference). Pages 15–17 are the billing guide and the full map. Pages 18–21 are the plan, the math, and the contract. Follow along live — then build the Deals database while it's fresh.

FIRST THINGS FIRST — WHAT IS NOTION?

Notion is an all-in-one workspace app — it runs on your Mac, PC, phone, and browser, and everything stays in sync. A page can hold anything: notes, checklists, documents, tables, files, photos. And the part that makes it special: any table can become a **smart database** — the same list of deals can be viewed as a spreadsheet, a kanban board, a calendar, or a gallery, with filters and reminders built in.

Think of it as **Google Docs + Excel + Trello + your transaction tracker, merged into one place** — with an AI assistant living inside that can write, summarize, and answer questions about anything you've stored there. You don't need to be technical. If you can type a text message, you can build in Notion.

The building blocks: a **Page** holds anything · a **Database** is a table that thinks · a **View** shows the same data as board, calendar, or list · a **Template** is a structure you reuse in one click · **Notion AI** writes and answers from your pages · a **Guest** is an outside collaborator who joins at \$0.

How Rich Is It? The Functionality Tour

CAPABILITY	WHAT IT DOES	WHAT IT MEANS FOR AN AGENT
 Pages & docs	Notes, checklists, documents — searchable	Listing notes and showing feedback, never lost again
 Databases	Tables that filter, sort, and link to each other	Deal pipeline, contacts, and vendors — all connected
 Views	Same data as board, calendar, list, gallery	One Deals table = pipeline board AND deadline calendar
 Templates	Any structure saved once, reused in a click	Contract-to-close checklist in every new deal
 Notion AI	Writes, summarizes, answers from your pages	Listing copy in your voice; "what's due this week?" answered
 Guests & sharing	Share single pages with outside people, at \$0	TC updates checklists; lender checks status; clients see a portal
 Publishing	Any page becomes a simple website in one click	A buyer-resources page live on the web in minutes
 Files	Attachments live where they belong	The inspection report on the deal — not in an inbox
 AI meeting notes	Transcribes and summarizes meetings	Every consult and listing appointment captured
 Integrations	Google Drive, Slack, Zapier, calendars	It joins your existing tools instead of fighting them

What It Can Gently Replace

Most agents find Notion absorbs their task app, notes app, transaction-tracking spreadsheet, and a shared-drive folder or two — not because those tools are bad, but because six tools that don't talk to each other is where deadlines go to hide. Nothing has to be replaced on day one.

The Realtor Loop — You at the Center

Capture → Follow Up → Organize → Automate → Track. Five verbs running in a loop around you, the realtor. The modules on your session artwork — Lead Pipeline, Client CRM, Listings Tracker, Content Calendar, Transaction Checklist, Open House Planner, Daily Priorities — are that loop made real. Start tonight: one workspace on the \$0 plan, ONE database (Deals, next page), live in it for a week.

New to Notion? This page is your map. Everything that follows builds on these six building blocks.

1

The Deal Pipeline HQ

Seven stages · Every deadline dated · One board you check with your coffee

Why This Works

A real estate transaction isn't complicated — it's **dense**. Fifteen-plus dated obligations sit between "offer accepted" and "keys handed over," and any one of them can cost you the deal or the client. The agents who look calm at closing aren't smarter; they moved every date out of their heads and into **one database that can't forget**.

Every deal — listing side or buyer side — is one card moving through seven stages. Every deadline is a dated property the calendar watches. Every offer and counter is logged on the deal's page. When a transaction turns tense — repair disputes, appraisal gaps, mediation — the paper trail is already assembled, and the AI can brief you on it in seconds.

The 7 Stages

- **1 · Listing Prep** — signed, staging, photos, pre-launch
- **2 · Active** — live on market, showings, open houses
- **3 · Offers & Negotiation** — offers in, counters out, log everything
- **4 · Under Contract** — executed, escrow opened, clock running
- **5 · Contingencies** — inspection, appraisal, financing in play
- **6 · Clear to Close** — docs to title, walk-through, wire watch
- **7 · Closed** — commission in, review requested, anniversary set

The Deadline Block

DATE PROPERTY	WATCHES
Offer Accepted	Effective date — every clock starts here
Escrow Deposit	Days 1–3 · the first trip wire
Inspection	The deal's make-or-break window
Appraisal	Gap = negotiation round two
Loan Commitment	The quiet deal-killer on buyer side
Title / HOA Docs	Estoppels are slower than you think
Walk-Through	24–48h before close
Closing	The date everything else serves

Board rule: if it has a date in the contract, it has a date property in the card. No exceptions — the system is only as trustworthy as its worst-entered deal.

The 4 Views That Replace 4 Apps

VIEW	TYPE	WHAT IT ANSWERS	WHEN YOU OPEN IT
Pipeline Board	Board by Stage	Where is every deal right now?	All day, every day
Deadline Radar	Calendar (all dates)	What can hurt me this month?	Every morning, with coffee
This Week	List · next 7 days	What must happen before Friday?	Monday planning
Closed YTD	Table · commission sum	How's the year actually going?	Friday review

SYSTEM 1 — BUILD PROMPTS

Copy into Notion AI (or Claude/ChatGPT and paste the result into Notion). Fill [] with your specifics. Always verify extracted dates against the signed contract — the AI drafts, you confirm.

PROMPT 1 — PIPELINE SCHEMA BUILDER

Build a Notion database schema for a real estate deal pipeline. Properties: Address (title), Side (select: Listing/Buyer), Stage (status: Listing Prep, Active, Offers & Negotiation, Under Contract, Contingencies, Clear to Close, Closed), Client (relation), List Price, Contract Price, Commission %, and date properties for: Listed, Offer Accepted, Escrow Deposit, Inspection, Appraisal, Loan Commitment, Title/HOA Docs, Final Walk-Through, Closing. Add a Next Action text property. Then describe 4 views: a board grouped by Stage, a calendar showing all date properties, a list filtered to dates within 7 days, and a Closed table summing commission.

Expected output: a property-by-property build sheet you can follow in 15 minutes.

Pro move: build it once, then Save as Template — every future deal duplicates the structure.

PROMPT 2 — CONTRACT-TO-CLOSE CHECKLIST GENERATOR

Create a contract-to-close checklist for a [STATE] residential [CASH / FINANCED] transaction on the [LISTING / BUYER] side. Organize by phase: Executed Contract → Escrow & Disclosures → Inspection Period → Appraisal & Financing → Title & HOA → Clear to Close → Closing Day → Post-Closing. For each task: who owns it (me, TC, lender, title, client), the typical deadline as days from effective date, and what happens if it slips. Flag any item that varies by contract form so I confirm it against the actual document.

Expected output: a 30–40 item phased checklist ready to save as a Notion template.

Pro move: make two templates — listing side and buyer side. They are not the same checklist.

PROMPT 3 — DEADLINE EXTRACTOR

Here are the key terms of my executed contract: effective date [DATE], inspection period [X] days, financing contingency [X] days, appraisal contingency [X] days, title evidence due [X] days before closing, closing date [DATE]. Calculate every actual calendar deadline, list them oldest-first with the day of the week, flag anything landing on a weekend or holiday, and tell me which three dates carry the most risk and why. Format the list so I can paste each date into my Notion deal card.

Expected output: a dated, risk-ranked deadline list — deal card ready.

Pro move: run it the hour the contract is executed, while the terms are in front of you. Then verify each date against the signed document.

SYSTEM 1 — THE DEAL UNDER PRESSURE

These three earn their keep when the transaction gets tense — negotiations, disputes, nervous clients. The log you kept in the deal page becomes your unfair advantage.

PROMPT 4 — NEGOTIATION & MEDIATION BRIEF

Read my negotiation log: [PASTE THE OFFER/COUNTER HISTORY AND DISPUTE NOTES FROM THE DEAL PAGE]. Produce a one-page brief before my call: 1) each side's stated position and what they've conceded so far, 2) the real gap in dollars and terms, 3) three resolution options that keep the deal alive, with the trade-off of each, 4) my strongest talking points and the two things I should NOT say, 5) my walk-away line based on [MY CLIENT'S PRIORITY]. Neutral tone, no legal advice — this is preparation for a conversation between agents, a mediator, or the parties.

Expected output: the brief top agents pay a coach to build — from your own logged facts.

Pro move: log every offer and counter the day it happens. The brief is only as strong as the log.

PROMPT 5 — CLIENT UPDATE COMPOSER

Using this deal card: [PASTE STAGE, RECENT ACTIVITY, UPCOMING DATES], write my weekly update to my [SELLER / BUYER]. Structure: what happened this week, what happens next and when, what I need from them (if anything), and one reassuring line grounded in a real fact from the deal — never generic filler. My voice: warm, direct, confident, no jargon. Under 150 words, ready to send as email or text. Client's current anxiety level: [LOW / MEDIUM / HIGH — WHY].

Expected output: the update that stops the "any news?" calls before they happen.

Pro move: send it the same day each week. Predictability is the product.

PROMPT 6 — MONDAY PIPELINE REVIEW

Here is my pipeline board as of this morning: [PASTE OR — ON THE BUSINESS PLAN — ASK THIS DIRECTLY IN THE DEALS DATABASE]. Give me the Monday briefing: 1) every deadline in the next 7 days, ranked by risk, 2) any deal that hasn't moved stages in 14+ days and the likely reason, 3) the three highest-leverage actions for today, 4) one deal where the client likely needs a touch even though nothing is "due." Keep it under 200 words — this is a briefing, not a report.

Expected output: your week, triaged, before your second coffee.

Pro move: on Business, this is one question typed into the database — no pasting.

The pattern: the pipeline isn't a filing cabinet — it's a briefing machine. Data goes in at the moment it happens; briefs, updates, and negotiation prep come out the moment you need them.

SYSTEM 1 — 20-MINUTE SETUP REFERENCE

STEP	WHERE	WHAT YOU DO	TIME
1 • Database	New page → Table	Name it 🏠 Deals · run Prompt 1 for the property list	5 min
2 • Stages	Stage property	Status type · add the 7 stages in order	2 min
3 • Deadline block	Properties	Add the 9 date properties from page 4	4 min
4 • Views	View switcher	Board · Calendar · This Week (filter: date within 7 days) · Closed	5 min
5 • Template	New button ▼	Deal template with checklist (Prompt 2) inside the page body	4 min
6 • Import	Your real deals	Every active transaction, real dates — tonight, not "someday"	tonight

Inside Every Deal Page

→ 🇮🇹 **Negotiation Log** — dated entries: offer, counter, who said what

→ ✅ **Contract-to-Close Checklist** — from the template, owner per task

→ ⚖️ **Dispute / Mediation Notes** — if it turns tense, the record is here

→ 📎 **Documents** — contract, addenda, inspection report links

→ 🤖 **AI Deal Summary** — the autofill property from System 3

→ 📞 **Touch log** — every client conversation, one line each

WORKSHEET — MY PIPELINE, MAPPED

MY ACTIVE DEALS GOING IN TONIGHT

ADDRESS	SIDE	STAGE	NEXT DEADLINE + DATE

THE DEADLINE THAT ALMOST SLIPPED LAST TIME

MY MORNING RITUAL TIME FOR THE DEADLINE RADAR

WHERE MY DEAL INFO LIVES TODAY (BE HONEST)

DEALS DATABASE LIVE BY (DATE + TIME)

2

The Listing & Marketing Engine

Property facts in once · Seven deliverables out · Your voice, every time

Why This Works

Every listing launch is the same seven deliverables: MLS description, social captions, email blast, open-house invite, just-listed announcement, photographer brief, and the seller's approval note. Most agents write them one at a time, from scratch, at 9 PM. The engine flips it: you fill in one **Property Facts block** — beds, baths, upgrades, the three things that made you say "wow" at the walk-through — and Notion AI drafts all seven, inside the deal page where they belong.

Behind it sits a **Marketing Calendar** database: every post, email, and open house scheduled by channel and date, linked to the deal it promotes. Content stops being a guilt list and becomes a production line.

The Launch Flow (Facts → Drafts → Approval)

- **You fill in (5 min):** address · specs · price · 3 hero features · neighborhood hook · what made YOU react at the walk-through
- **AI drafts (60 sec):** MLS description · 3 IG captions · FB post · email blast · open-house invite · just-listed text
- **You approve (10 min):** fact-check every claim · fair-housing scan · voice check · schedule on the calendar

The Marketing Calendar Database

PROPERTY	TYPE	WHY IT MATTERS
Piece (title)	Title	"412 Palm Way — Launch IG carousel"
Channel	Select: IG · FB · Email · Open House · Video	Calendar view grouped by channel shows the week's mix
Publish Date	Date	The calendar view IS your content plan
Deal	Relation → Deals	Marketing never loses track of what's actually for sale
Status	Draft · Approved · Scheduled · Posted	Nothing ships from "Draft" — the approval gate lives here

The Voice Profile Page

One page titled **"My Voice"**:

- 3 writing samples you love
- 10 words you'd never use ("nestled," "boasts," "oasis"...)
- Your market + niche in two lines
- One paragraph on how you talk to clients

Every marketing prompt references it. That's how the first draft sounds like you — not like everyone else's AI.

The licensee rule: AI drafts, you approve.

Every claim fact-checked, every piece fair-housing scanned, before anything ships. Non-negotiable.

SYSTEM 2 — LAUNCH PROMPTS

Prompt 1 is the workhorse — save it inside your Listing Launch template so it's waiting in every new deal page. Every output gets your fact-check and fair-housing pass before it ships.

PROMPT 1 — LISTING LAUNCH KIT

Using the Property Facts above this block and my "My Voice" page, draft the full listing launch kit: 1) an MLS description under 250 words, 2) three Instagram captions — one lifestyle, one feature-led, one urgency-framed — with hashtag sets, 3) a Facebook post for my business page, 4) an email blast to my sphere with a subject line under 45 characters, 5) an open-house invite, 6) a just-listed text under 300 characters. Rules: every claim must come from the facts block — invent nothing. Describe the property and lifestyle, never the ideal buyer or neighbors. No clichés: never "nestled," "boasts," "stunning," "oasis." Label each piece clearly.

Expected output: the full launch set, labeled, in your voice — 60 seconds after the facts go in.

Pro move: the "what made YOU react" fact is what keeps the copy from sounding like every other listing on the street.

PROMPT 2 — FAIR-HOUSING-SAFE REWRITER

Review this listing copy for fair-housing risk: [PASTE COPY]. Flag any language that describes or implies a preferred buyer — family status, religion, national origin, age, disability, or "perfect for" framing — and any factual claim not supported by my facts block. Explain each flag in one line, then rewrite the copy so it describes only the property, the features, and the lifestyle the space enables. Keep my voice and energy; lose the risk.

Expected output: flagged risks with one-line reasons, plus the clean rewrite.

Pro move: run it on copy you wrote yourself too — the scan is the habit, not the tool.

PROMPT 3 — OPEN HOUSE KIT

Build my open house kit for [ADDRESS] on [DATE/TIME]: 1) an event announcement for Instagram and Facebook, 2) a reminder post for the morning of, 3) a neighbor-invite knock/text script ("come see what homes here are selling for"), 4) a sign-in question set that reveals buyer timeline and financing status without feeling like an interrogation, 5) three same-day follow-up messages — hot buyer, curious neighbor, agent visitor — each under 80 words, referencing something specific from the visit slot I'll fill in: [DETAIL].

Expected output: promo, capture, and follow-up — the whole event, one prompt.

Pro move: send the follow-ups the same evening. The [DETAIL] slot is why they don't read as blasts.

Prompts 4–6 — momentum and market authority — continue on the next page

SYSTEM 2 — MOMENTUM PROMPTS

The launch gets attention; these three keep it. Price repositioning, weekly authority content, and the just-sold story machine.

PROMPT 4 — PRICE-REDUCTION STORY

The price on [ADDRESS] is adjusting from [OLD] to [NEW]. Write: 1) the seller conversation script that frames this as strategy, not defeat — anchored in [DAYS ON MARKET, SHOWINGS, FEEDBACK], 2) the MLS remarks update that creates fresh energy without the phrase "price reduced," 3) a social post positioning it as "new opportunity at a new number," 4) a direct email to the five agents whose buyers saw it, with the one-line reason this price changes their math. Confident tone throughout — a repositioning, never an apology.

Expected output: the hardest conversation in real estate, prepped — plus the relaunch content.

Pro move: the agent-direct email is the piece most agents skip. It's also the one that sells the house.

PROMPT 5 — WEEKLY MARKET UPDATE

Turn these numbers from my MLS this week — [ACTIVE, NEW, PENDING, SOLD, MEDIAN PRICE, AVG DOM for MY AREA] — into my weekly market update: 1) one plain-English insight a homeowner actually cares about (not a data dump), 2) an Instagram carousel outline — 5 slides, one number per slide with the "so what," 3) a 120-word email to my sphere, 4) a 30-second video script I can read to camera. Voice: local expert who translates, never lectures. End each piece with a soft door-opener, not a hard pitch.

Expected output: a week of authority content from five numbers you already have.

Pro move: schedule it on the Marketing Calendar as a recurring Monday entry. Consistency is the algorithm.

PROMPT 6 — JUST-SOLD MOMENTUM MACHINE

We closed [ADDRESS] — [ONE-LINE STORY: over ask / 9 days / tough appraisal saved / relocation win]. Create: 1) a just-sold post telling the story in 3 sentences (results, not bragging), 2) a neighbor letter/text: "curious what this sale means for your home's value?", 3) a review request to my client that makes leaving one effortless — include 2 sentences they could adapt, 4) a testimonial-plus-lesson post for when the review lands. Every piece rooted in the real story; nothing generic.

Expected output: one closing converted into four assets — proof, prospecting, review, and content.

Pro move: the neighbor piece is a listing-lead machine. Send it within 72 hours of recording.

The pattern: every marketing prompt pulls from the deal card and the Voice Profile. The engine isn't a prompt collection — it's your pipeline data turned into your marketing, automatically in your voice.

SYSTEM 2 — SETUP REFERENCE

STEP	WHERE	WHAT YOU DO	TIME
1 • Voice Profile	New page: "My Voice"	3 samples · 10 banned words · market + niche lines	15 min
2 • Launch template	Deals template	Property Facts block + Prompt 1 saved beneath it	10 min
3 • Marketing Calendar	New database	Piece · Channel · Publish Date · Deal relation · Status	10 min
4 • Recurring anchors	Calendar	Monday market update · Friday just-sold/story slot	5 min
5 • First launch	A real listing	Facts in → drafts out → approve → schedule the week	25 min

The Approval Gate (Every Piece, Every Time)

☐ **Facts:** every claim traced to the facts block or the MLS

☐ **Fair housing:** property and lifestyle only — never the buyer

☐ **Voice:** passes the "would I say this out loud?" test

☐ **Status flip:** Draft → Approved is a decision, not a formality

WORKSHEET — MY ENGINE, LOADED

MY NEXT LISTING THROUGH THE ENGINE (ADDRESS + DATE)

THE 3 HERO FEATURES I'D LEAD WITH

10 WORDS BANNED FROM MY COPY

MY WEEKLY CONTENT ANCHORS (DAY + PIECE)

THE 3 WRITING SAMPLES GOING INTO "MY VOICE" (WHERE THEY LIVE NOW)

Reality check: the engine works on your SECOND listing twice as well as your first — because by then the Voice Profile has been corrected by real edits. Ship the first launch imperfect; the system learns from your red pen.

3

The AI Maximizer & Billing Defense

Get everything you pay for · Stop paying for what you don't use

Maximize: The Four Features That Earn the Seat

- 🔍 **Workspace Q&A** — "What's the inspection deadline on Palm Way?"
Answered from your own deal cards, not the internet. Your workspace becomes a search engine for your business.
- 🗣️ **AI Meeting Notes** — buyer consults and listing appointments transcribed and summarized straight into the deal page. Every promise captured.
- ⚡ **Database Autofill** — a "Deal Status Summary" column that writes itself from each page's contents. Your board explains itself.
- 🗨️ **In-Page Drafting** — every System 2 prompt runs where the deal lives, against your Voice Profile — no copy-pasting between apps.

Use all four and the Business seat pays for itself weekly. Use none, and a smaller plan will serve you just as well — pay for the AI only once it's doing real work for you.

The Billing Model, One Paragraph

Notion charges **per member, per month**. Plans: \$0 · Plus \$10/seat annual (\$12 monthly) · Business \$20/seat annual (\$24 monthly) · Enterprise custom. **Notion AI is only included in Business and Enterprise** — the old \$10 add-on for cheaper plans is gone. Members cost money; **guests cost \$0**, and paid plans allow unlimited guests.

Members pay. Guests don't. That one sentence is where nearly every Notion overpayment starts — and ends.

Who Even Needs Business?

Building Systems 1–2 with AI writing the copy and answering questions across deals: **Business**. Running the pipeline manually and doing your own writing: **Plus — or the \$0 plan while solo**. The workbook works on every tier; the AI layer is what the upgrade buys.

The 5 Billing Traps

#	THE TRAP	HOW IT BITES	THE DEFENSE
1	👤 The Seat Trap	TC, photographer, assistant invited as members — \$240–288/yr each	Invite as guests on specific pages. Member is earned, not default
2	🗨️ The Monthly Toggle	\$24 vs \$20 — a quiet 20% premium forever	Annual billing the day you decide the system stays
3	🧠 The AI Tier Trap	Buy Plus wanting AI → trial ends → pay Plus AND upgrade anyway	If AI is the point, budget \$20 from day one
4	📁 Workspace Sprawl	Second workspace = second subscription, silently	One workspace, teamspaces inside it — never two bills
5	👤 The Ghost Seat	Assistant left in March; seat billed through December	Quarterly: Settings → People → sort by last active → clean

SYSTEM 3 — MAXIMIZER PROMPTS

These three turn the Business plan's AI from a novelty into staff. All three run inside Notion — the whole point is that your data is already there.

PROMPT 1 — WORKSPACE Q&A STARTER PACK

[ASK NOTION AI, IN YOUR WORKSPACE:] Across my Deals database: which deadlines fall in the next 7 days? Which deals have been in the same stage longest? Summarize the negotiation log on [ADDRESS] in 5 bullets. What did I promise the seller on [ADDRESS] in my last meeting notes? Draft a status text for [CLIENT] from their deal page. List every task on the [ADDRESS] closing checklist that is unchecked and past due.

Expected output: instant answers sourced from your own pages — with links to where they came from.

Pro move: the questions only work if the data went in. Q&A quality is a mirror of your logging habit.

PROMPT 2 — MEETING NOTES → DEAL UPDATE

From this AI meeting-notes transcript of my [BUYER CONSULT / LISTING APPOINTMENT / INSPECTION CALL]: extract 1) every commitment I made and its deadline, 2) every commitment the other party made, 3) changes to price, terms, or timeline, 4) the client's emotional temperature in one line, 5) the next action for the deal card. Format as an update block I can paste into the deal page, dated today.

Expected output: the meeting, converted to deal-card facts in 30 seconds.

Pro move: commitments YOU made go straight onto This Week. That's how nothing slips.

PROMPT 3 — AUTOFILL COLUMN SPEC

[USE AS THE AUTOFILL INSTRUCTION ON A "DEAL STATUS SUMMARY" AI PROPERTY:] Summarize this deal in exactly 2 sentences: sentence one = where the deal stands right now and the next deadline with its date; sentence two = the single biggest risk or open item. Write for a busy agent scanning a board — specific, no filler, update-worthy.

Expected output: a board where every card explains itself — no clicking in.

Pro move: set it to update on page edit. Your Monday review (System 1, Prompt 6) reads this column.

The test: two weeks after the upgrade, ask yourself — did the AI answer questions, capture meetings, and summarize deals this week? If yes, the seat is staff. If no, downgrade without guilt; the pipeline still works on Plus.

SYSTEM 3 — DEFENSE PROMPTS

Run Prompt 4 before your next renewal date, not after. Prompt 6 is the weekly ritual that keeps the whole Command Center honest.

PROMPT 4 — THE BILLING AUDIT

Audit my Notion bill. Plan: [PLAN + MONTHLY/ANNUAL]. Members: [LIST EACH PERSON AND WHAT THEY ACTUALLY DO IN THE WORKSPACE]. Workspaces I own: [LIST]. For each member: do they create and edit across the workspace (member) or view/comment on specific pages (guest)? Calculate: 1) my current annual cost, 2) my cost with every misclassified member demoted to guest, 3) savings from switching monthly to annual, 4) savings from consolidating workspaces. Give me the final number: what this should cost per year, and the three moves to get there, in order.

Expected output: your real number — most agents find \$200–1,200/year hiding in this audit.

Pro move: calendar it quarterly, same day you check your other subscriptions. Ten minutes.

PROMPT 5 — THE PLAN DECISION

Recommend my Notion plan. Facts: team of [N] who genuinely build (not just view) · I [DO / DON'T] want Notion AI writing my listings and answering questions across my deals · guests I need: [ROUGH COUNT] · budget sensitivity: [HIGH/LOW] · current tools this replaces: [LIST + MONTHLY COSTS]. Compare \$0, Plus (\$10 annual/\$12 monthly per seat), and Business (\$20 annual/\$24 monthly per seat, AI included) over 12 months, including what I save by canceling replaced tools. Tell me the plan, the billing cycle, and the date I should revisit the decision.

Expected output: a plan, a cycle, and a revisit date — a decision, not a shrug.

Pro move: include the replaced tools honestly. The system usually costs less than what it cancels.

PROMPT 6 — THE FRIDAY WORKSPACE REVIEW

Run my 10-minute Friday review of the Command Center. This week: deals that changed stage [LIST], deadlines hit or missed [LIST], marketing shipped [LIST]. Tell me: 1) any deal card with stale or missing data that will bite me next week, 2) one template that needs an upgrade based on how I actually used it, 3) one thing I did manually this week that the workspace should do for me, 4) my workspace health score out of 10 with the single fix that raises it. Under 200 words.

Expected output: a health score, a fix, and a sharper system every single week.

Pro move: pair it with the Deadline Radar — Friday review closes the week, Monday briefing opens it.

The pattern: maximize first, then tidy the bill. An audited \$240/year running all three systems is a bargain. An unaudited \$1,440/year running none of them is exactly what this session helps you avoid.

THE BILLING GUIDE

The Plans (verified July 2026 · per member, per month)

PLAN	ANNUAL	MONTHLY	NOTION AI	RIGHT FOR
\$0 Plan	\$0	\$0	Limited trial	Building solo, proving the system sticks · 10-guest cap
Plus	\$10	\$12	Limited trial	Solo agent, manual writing, unlimited guests, 30-day history
Business	\$20	\$24	Included	The full engine — AI Q&A, meeting notes, autofill
Enterprise	Custom		Included	Brokerages — SSO, audit, provisioning

The Trap Math — Same Agent, Same Workspace, Same Work

SETUP	SEATS	ANNUAL COST	VERDICT
Business monthly · you + TC + assistant + photographer + partner all "members"	5 × \$24 × 12	\$1,440	🗑️ The accidental default
Business monthly · you member, everyone else guest	1 × \$24 × 12	\$288	⚠️ Better — annual toggle still unset
Business annual · you member, everyone else guest	1 × \$20 × 12	\$240	✅ The system in this workbook
Plus annual · solo, no AI layer	1 × \$10 × 12	\$120	✅ If you skip the AI features

The difference between row one and row three is **\$1,200 a year** — and closing it takes two settings screens and about five minutes. Nobody's doing anything wrong here; the defaults simply favor Notion. After today, they'll favor you. Guest vs. member is decided per person at invite time; the billing cycle is one toggle in Settings → Billing.

Member or Guest? The 10-Second Test

PERSON	WHAT THEY DO	INVITE AS
You	Build, edit, own everything	Member — the paid seat
Transaction coordinator	Update checklists on deal pages	Guest on the Deals pages
Photographer / stager	View the brief, drop files	Guest on one page
Lender / title contact	Check status, comment	Guest on one deal
Buyer / seller client	View their portal page	Guest on their portal
Partner building daily	Creates databases, edits everywhere	Member — the rare second seat that's earned

The one-sentence defense: one workspace · one paid seat · annual billing · everyone else is a guest at \$0

WHICH PLAN — AND WHEN TO CHANGE IT

🚩 START HERE — Week 1 · \$0 Plan

- Build the Deals database + views solo
- Import every active deal
- Prove the morning ritual sticks for 2 weeks
- Limit that matters: 10 guests max

🔥 MANUAL WRITER — Plus · \$10 annual

- You write your own copy, AI trial ran out
- Unlimited guests — TC and vendors join
- 30-day page history — undo your mistakes
- \$120/year, total

🤖 FULL ENGINE — Business · \$20 annual

- Notion AI included: Q&A, notes, autofill
- The System 2 engine runs in-page
- Upgrade when the AI does real work weekly
- \$240/year — one seat, audited

The Upgrade Triggers (Move Up Only When One Fires)

- **\$0 → Plus:** your 11th guest, or you need more than 2 weeks of page history
- **Plus → Business:** you catch yourself copy-pasting deal data into an outside AI more than twice a week — the data should answer where it lives
- **Business → Enterprise:** your brokerage is buying — SSO and provisioning are their problem, not yours
- **Any plan → annual:** the day you realize the system survived 30 days. Monthly is for testing; annual is for keeping.

The Quarterly Audit Ritual (10 Minutes, 4 Steps)

STEP	WHERE	QUESTION
1 • Seats	Settings → People	Is every member still building weekly? Demote or remove the rest
2 • Cycle	Settings → Billing	Am I on annual? If monthly for 3+ months — why?
3 • Sprawl	Workspace switcher	Am I paying for a second workspace I forgot about?
4 • Value	Prompt 4 (page 14)	Run the Billing Audit — does the number still make sense?

Downgrading is allowed. The workbook's pipeline runs on every tier. If the AI layer stops earning its \$10/month premium over Plus, drop it — the Command Center keeps commanding. Loyalty belongs to the system, not the subscription.

THE REALTOR COMMAND CENTER MAP

DATABASE	WHAT LIVES THERE	CONNECTS TO	BUILD
 Deals	Every transaction · 7 stages · deadline block · negotiation log · closing checklist	Contacts · Marketing	Week 1
 Contacts	Clients, prospects, vendors, agents — source, last touch, next touch	Deals · lifetime-business rollup	Week 2
 Marketing Calendar	Every post, email, open house by channel and date	Deals (which listing it promotes)	Week 3
 Playbook	Voice Profile · scripts · checklist templates · vendor list · prompt library	Referenced by every AI prompt	Week 4
 Business Tracker	Commission pipeline · expenses · goals vs. actual	Deals (commission rollup)	Week 4

On your session artwork these appear as the Realtor Command Center modules: **Lead Pipeline & Client CRM** = Deals + Contacts · **Listings Tracker** = Deals (listing side) · **Content Calendar & Open House Planner** = Marketing Calendar · **Transaction Checklist** = the deal template · **Daily Priorities** = the This Week view.

The Build Order Rule

Deals first — it pays for the whole system. Contacts second, because deals need clients. Everything else arrives only after the previous database has real data in it. A half-used command center is how Notion graveyards start.

Guest Wiring (Who Sees What)

- **TC** → guest on Deals pages (checklists live there)
- **Lender/title** → guest on their one deal page
- **Client** → guest on a portal page you make from the deal
- **Nobody** → sees Business Tracker except you

The 5 Command-Center Killers

KILLER	ANTIDOTE
Building all 5 databases day one	Deals only, until it's habit
Half-entered deals you don't trust	Every date real, or don't bother
The pretty-template rabbit hole	Function first; decorate in month 2
Keeping the old apps "just in case"	Retire them in week 4, once the system has earned your trust
Everyone invited as a member	The 10-second test, every invite

The compounding effect: month 1, it's a deadline tracker. Month 3, the AI answers questions about your business. Month 12, it's the operating manual a new assistant learns from in days — and an asset that makes your book of business worth more.

MY BUILD ORDER COMMITMENT (DATABASES + DATES)

Next: the 30-day plan — pipeline, templates, engine, lock-in

THE 30-DAY REALTOR COMMAND CENTER PLAN

From six scattered apps to one workspace in four weeks. Each week has five checkboxes — five, not fifteen, because finished beats fancy.

WEEK 1 — THE PIPELINE → Workspace created — the \$0 plan is fine to start → Deals database: 7 stages + the deadline block → Every active deal imported with real dates → Deadline Radar + This Week views live → Morning ritual: coffee + Radar, daily	WEEK 2 — TEMPLATES & CONTACTS → Contract-to-close checklists saved (listing + buyer) → Contacts database built, linked to Deals → Listing Launch template with facts block → Voice Profile written: 3 samples, 10 banned words → TC / first collaborator invited — as a guest
WEEK 3 — THE ENGINE → Next listing (or re-launch) through the full engine → Marketing Calendar live, 2 weeks scheduled → Weekly market update produced from Prompt 5 → AI decision: stay manual (Plus) or upgrade (Business) → If Business: Q&A + meeting notes + autofill all on	WEEK 4 — THE LOCK-IN → Billing Audit run — members cleaned, guests demoted → Annual toggle flipped on the plan I'm keeping → Replaced apps canceled — savings written down → Playbook + Business Tracker added → Friday 10-minute review on the calendar, recurring

Day-30 Scorecard

QUESTION	YES / NO	IF NO — THE FIX
Did any deadline surprise me this month?		A date didn't go in — tighten the entry habit
Did my last listing launch from the engine?		Facts block was skipped — it's 5 minutes, run it
Is everyone but me a guest?		Run the 10-second test on every member today
Am I on annual billing?		Settings → Billing — 30 seconds, 20% back
Does the workspace answer questions about my business?		Data's thin — two weeks of real logging changes this

Next: the ROI calculator — what one seat buys back

YOUR REALTOR COMMAND CENTER ROI

Time Math

LINE	YOUR NUMBER	EXAMPLE
Hours/week hunting deal info across apps, texts & email		5 hrs
My hourly value (GCI ÷ working hours)		\$150/hr
Monthly recovery (hours × 4.3 × rate)		5 × 4.3 × \$150 = \$3,225/mo
Apps this replaces (tasks, notes, transaction tracker...)		\$47/mo canceled

Risk Math

LINE	YOUR NUMBER	EXAMPLE
What one blown deadline costs (deal, commission, or client)		avg commission: \$12,000
Blown or nearly-blown deadlines in the last 12 months		2 close calls
The system's total annual cost (plan × 12)		Business annual: \$240
Break-even: deadlines the system must save per year		0.02 — one save pays for 50 years

Asset Math

What is a workspace worth that remembers every deal, every client, and every promise — when you add a partner, hire an assistant, or sell your book of business?

MY MONTHLY RECOVERY NUMBER

MY TOTAL SYSTEM COST PER MONTH

Read the spread: if your recovery number is \$3,225 and your cost is \$20, the question was never "can I afford the seat?" It was "how long can I afford the chaos?" The billing defense isn't about spending less — it's about never paying for what isn't working.

Next: the commitment contract — signed before you log off

MY COMMITMENT CONTRACT

I commit to:

- ☐ Build my Deals database with all 7 stages by: _____ (tonight counts)
- ☐ Import every active deal with real deadlines within 48 hours, done by: _____
- ☐ Run my next listing through the full Launch Engine on: _____ (listing + date)
- ☐ Invite collaborators as guests, never members — and run the Billing Audit before: _____
- ☐ Check the Deadline Radar every morning and run the Friday review every week, starting: _____

THE DATABASE I'M BUILDING FIRST



Deals



Contacts



Marketing



Playbook



Tracker

MY BIGGEST OBSTACLE — AND MY PRE-DECIDED RESPONSE

MY PLAN DECISION + BILLING CYCLE

MY ACCOUNTABILITY PARTNER + CHECK-IN CADENCE

The Stakes

This contract has no penalty clause, because it doesn't need one — it's a promise to your future self: deadlines that never slip, listings that launch in minutes, and a bill that reflects exactly what you use. Sign it while the momentum is real; future-you will be glad you did.

Signature

Printed Name

Date

Accountability move: screenshot this signed page and post it in the REIGNation community thread for this session. Public commitments get built; private ones get postponed.

THE REALTOR COMMAND CENTER MANIFESTO

**I don't chase my deals.
I command them.**

Every agent runs a command center. Most just don't know where it is — because it's smeared across a phone's text history, four apps, two notebooks, and a transaction coordinator's inbox. When the deal gets tense, they're not negotiating. They're searching.

The agents who look unshakeable at the closing table made one decision: everything about the business lives in one place. Every deadline is a date the system watches. Every offer, counter, and concession is logged where the AI can brief them on it. Every listing launches from a template that gets better each time it runs.

And every dollar they pay for the tool is a dollar they *decided* to pay — one seat, annual billing, guests riding along at \$0. They read the pricing page the way they read a contract: completely, once, and to their advantage.

That's not software. That's **command**. And a year from now, when every agent has AI in their workspace, the difference won't be the tool. It will be who took one focused hour to build a system around it.

One system. Every area of your business. Work smarter. Close more. Live better. That's the power of Notion.

"Because Paying for Chaos is NOT an Option!"

— Edmund Bogen · Edmund's Mastermind · Bogen.ai

Workbook & resources: bogen.ai/masterminds/notion-command-center

Community: reignation.com · Edmund's Mastermind & Group Coaching