AI Assistant for Real Estate Brokerages

A Canadian brokerage made a decade of manager advice searchable by every REALTOR®

An internal AI assistant built on more than 70,000 recorded manager answers gives REALTORS®, managers and staff an instant route to practice, policy and procedure guidance. Monthly questions grew from about 170 to more than 2,200 once agents could ask it directly.

13x	70,000+	5	2
Growth in monthly questions	Manager answers in the knowledge base	Source types in one assistant	Use cases live on one account

THE CHALLENGE

Every question had one route to an answer, and it ran through a manager

A REALTOR® with a client waiting on an answer. A manager fielding the same question again. A staff member who needs to double check a legislative detail. Before CustomGPT.ai, all three had one route to an answer, and it went to a manager.

Managers are still fully available for support, and the brokerage wanted to keep it that way. What it wanted to add was a second option for agents who prefer to get an answer on demand and on their own schedule, so they could move their careers and deals forward faster whenever an AI answer was appropriate.

WHAT GOT BUILT

An internal assistant for REALTORS®, managers and staff. Practice, policy and procedure answers without waiting for a person.

A knowledge base anchored by a decade of manager answers. More than 70,000 recorded questions and answers, beside internal policies, forms and a professional development video library.

Five source types in one assistant. Recorded manager answers, website crawls, Google Drive documents, YouTube video transcripts and uploaded files.

A virtual office search bar. A second use case on the same account, which makes the resources available to agents faster to find.

WHAT STAYED, AND WHAT WAS ADDED

Managers stayed available. An agent can still pick up the phone whenever they need or want to.

An instant answer was added. Agents who prefer to find it themselves get one on demand.

Checking became a habit. More agents ask the assistant first each week, then call a manager to verify when they want to.

SWORN TO SECRECY

A large, independent Canadian real estate brokerage, locally owned and in business for more than 40 years. It describes itself as one of Canada's largest independent brokerages and serves hundreds of REALTORS® and staff. Shared anonymously. Every detail comes from the brokerage's own account of the deployment.

> *"It's been a very helpful tool to keep up with the AI wave, offering a great option for agents to use as they need and want to, in a world where technology is changing fast."*
>
> A CANADIAN REAL ESTATE BROKERAGE

AT A GLANCE

INDUSTRY	Real estate brokerage. A large, independent Canadian brokerage
EXPERIENCE	More than 40 years in business
PEOPLE SERVED	Hundreds of REALTORS®, managers and staff
OBJECTIVE	Give agents an on-demand route to practice, policy and procedure answers, beside the managers they already rely on
DEPLOYMENT	Internal assistants on CustomGPT.ai for REALTORS®, managers and staff, plus a virtual office search bar
KNOWLEDGE BASE	More than 70,000 recorded manager questions and answers, website pages and crawls, Google Drive documents, YouTube video transcripts and uploaded files
CONNECTORS	One MCP connector for web search, used for anti-money laundering adverse media checks
ROLLOUT	Several months of manager-only vetting before access opened to agents

WHY IT WORKED

Six things that carried the rollout

The brokerage took its time because it wanted a product it was proud to offer its agents. If you are planning the same thing for your own brokerage, these are the six that made the difference.

1. **A second route beside the managers.** Managers stayed available, so agents could choose the assistant when it fit and a person when it did not.
2. **A decade of real answers.** More than 70,000 recorded manager responses give the assistant the brokerage's own voice on practice, policy and procedure.
3. **Many source types in one assistant.** Recorded answers, crawls, Drive documents, video transcripts and uploads work together without separate tools for each.
4. **Content that stays current.** Scheduled refreshes, auto-sync and weekly updates keep sources fresh without constant manual work.
5. **Safe changes.** The sandbox lets the team test updates before agents see them.
6. **Visible quality.** Conversation history and analytics show what agents ask and where answers need work.

HOW IT WAS BUILT

Managers first, agents second, and a second use case once both held up

Managers vetted it first. The assistant ran internally with managers for several months, so the brokerage could get the rollout right before offering it to agents.

Access opened to agents. Once the managers were satisfied, agents could ask the assistant directly and get instant answers.

A second use case was added. The same CustomGPT.ai account now powers a virtual office search bar, which makes the resources available to agents faster to find.

One assistant took on a compliance check. It uses the web search connector to run adverse media checks for Canadian anti-money laundering compliance, a quick first look before the manual review.

WHO KEEPS IT CURRENT

A manager who curates the knowledge base adds new sources as things change. An in-house programmer sends weekly updates from the brokerage's internal question and answer database, so new manager answers flow in.

HOW CHANGES REACH AGENTS

Many sources refresh on a schedule and some sync automatically. The team tests changes in the CustomGPT.ai sandbox before they reach agents.

THE CAPABILITY THAT GIVES IT ITS VALUE

A decade of manager advice, searchable by every REALTOR®

The content that matters most is the brokerage's own history. Managers have recorded more than 70,000 questions and answers over the past decade, covering practice, policy, procedure, legislation and regulatory guidance. They sit in the same assistant as the brokerage's internal policies and forms and its professional development video library. A REALTOR® asking a question is, in effect, searching what the brokerage's managers have already said, alongside the documents those answers rest on.

THE RESULTS

Monthly questions grew thirteenfold once agents could ask directly

MEASURE	AS REPORTED BY THE BROKERAGE
Questions per month, before agents had access	About 170
Questions per month, with agents asking directly	More than 2,200
Growth in monthly questions	13x
Manager answers in the knowledge base	70,000+
Source types in one assistant	5
Use cases live on one account	2

WHAT THE NUMBERS SAY

Monthly question volume is the main measure the brokerage tracks, and it rose sharply once agents could use the assistant directly, from about 170 to more than 2,200 within a few months. The brokerage also reviews conversation data to judge answer quality, and it reads conversation history and analytics regularly to spot weak or outdated answers and decide what to fix.

TRUST, WEEK BY WEEK

More agents check the assistant first with each passing week, and then call a manager to verify an answer when they want to. REALTORS® now have reliable, instant information, and they can still reach a person whenever they need to.

WHY THE BROKERAGE CHOSE CUSTOMGPT.AI

Support that felt human. It was the first reason the brokerage gave for its choice.

Customization that was easy to understand. The options were broad, and the team could follow them.

A platform it could shape. The brokerage needed one it could fit to its own content and workflow.

WHAT THIS MEANS FOR YOU

The advice your managers have already given is the knowledge base.

Let the people who know the answers go first. Managers vetted this assistant for several months before any agent saw it.

Keep the human route open. Agents here choose the assistant when it fits and a manager when it does not, and use rises every week.

LOOKING AHEAD

The REALTOR® with a client waiting can now get an instant answer. The manager has a second route that takes some of the repeat questions, and the staff member checking legislation has a reliable source on demand. Each of them can still call a person when the situation calls for one. The brokerage is continuing to clean out outdated answers, and it plans to look at Plan & Act in more detail to see how it could help its team and agents.