

THE SIX LEVELS OF AI

Field Guide

Most people are asking a stranger to do an insider's job.

The six-level self-audit, a prompt framework for every level, and 100 starter prompts written for commercial real estate and AEC professionals. Use the first one tonight.

NERD/HERD

BUILD AI INSTITUTE

MN CREW Edition · August 2026 · nerdherdpro.com/ai-education

Same AI. Six levels.

Every level is a move you already know how to make with a new hire. What changes is what the AI knows and what it can reach.

1 Hire it	You are here if you open a blank chat and type a question. It answers like a talented stranger, because it is one.
2 Onboard it	You are here if it knows your role, your market, and how you write, through memory and custom instructions.
3 Give it an office	You are here if your pursuits and clients each have their own project loaded with documents, so every conversation starts briefed.
4 Train it	You are here if it runs your repeatable tasks your way, taught once, used forever.
5 Hand it the keys	You are here if it reads your calendar, inbox, and meeting notes, and goes to look things up itself.
6 Put it on the org chart	You are here if it holds standing responsibilities on a schedule, and the briefing is waiting before you sit down.

DIAL ONE: WHAT IT KNOWS

Your voice, your clients, your rules. Loaded by you, at every level.

DIAL TWO: WHAT IT CAN REACH

From nothing, to your files, to your calendar and inbox, to a standing schedule.

Find your level. Go up exactly one this week.

One rule travels with you the whole way up: human review stays permanent for anything client-facing, anything with a number in it, and anything legal. The levels raise what AI can do. Judgment stays yours.

LEVEL 1

Hire it

A brilliant stranger just walked in. Give them a real work order.

THE MOVE

A prompt is a work order, and vague work orders get change orders. Give it a role, the context, the task, the audience, and the format. Then use the five-word upgrade below on everything.

LEVEL 1 · HIRE IT

THE PROMPT FRAMEWORK: THE WORK ORDER

Role (who it should act as) + Context (what it needs to know) + Task (exactly what to produce) + Audience (who receives it) + Format (how it should be organized). Close with the five-word upgrade:

"Ask me questions first." The stranger interviews you instead of guessing, and the output gets personal fast.

STARTER PROMPTS 1 TO 20

- 1** You are a commercial real estate copywriter. Write a LinkedIn post under 100 words announcing our new listing. Audience: brokers and owners. Plain language, no hashtags. Ask me questions first.
- 2** You are a business development director at a commercial contractor. Using my notes below, write a proposal follow-up email to an executive who skims. Subject line, three short paragraphs, one clear next step. Ask me questions first.
- 3** Rewrite this email so a busy executive can read it in 20 seconds. Keep my voice. Show me what you cut and why.
- 4** Summarize this market report in five bullets a client would actually care about. Flag anything that needs a source before I repeat it.
- 5** I am walking into a negotiation about [topic]. Give me the five questions the other side will ask and a one-line answer for each. Ask me questions first.
- 6** Explain this lease clause in plain English, then list the risks a tenant should ask their attorney about.
- 7** Draft a 30-minute kickoff agenda for a new property management client. Goal: leave the meeting with three decisions made.
- 8** Turn these bullet notes into a polished project update for an owner. 150 words, confident, zero jargon.
- 9** Give me ten subject lines for an email inviting brokers to a property tour. No puns, no exclamation points.
- 10** Act as a skeptical facilities director. Read my pitch below and tell me exactly where you stopped believing me.
- 11** I have 25 minutes between meetings. Prioritize this to-do list by revenue impact and tell me what to skip entirely today.
- 12** Write a thank-you note to a client who just referred us. Warm, specific, three sentences.
- 13** Compare these two vendor quotes and list the questions I should ask each vendor before deciding.
- 14** Draft talking points for a five-minute update at Monday's leadership meeting: pipeline, risks, and my asks.
- 15** Turn this property flyer into three short descriptions for three audiences: an investor, a tenant, and a broker.
- 16** I need to decline this RFP politely and keep the relationship warm. Draft the email.
- 17** Roleplay a cold call with a developer prospect. You are the prospect. Push back the way a real one would.
- 18** Explain what a cap rate tells you and what it hides, written for a new hire's first week.
- 19** Read this long email thread and tell me three things: what is decided, what is open, and what I owe anyone.
- 20** Before answering anything: ask me five questions about my business that you would need answered to write like an insider.

Onboard it

It knows your role, your market, and how you sound. Set once, warmer forever.

THE MOVE

Open your platform's custom instructions or memory settings and introduce yourself the way you would brief a new assistant. One rule before you start: client confidences, deal terms, and anything under NDA never get saved, and your company's AI policy wins every time.

LEVEL 2 · ONBOARD IT

THE PROMPT FRAMEWORK: THE ONBOARDING BRIEF

I am a [role] at a [firm type] in [market]. My clients are [types]. My audience defaults to [who]. I write [three style rules]. Default outputs: [length, format, one clear ask]. Never store client names, deal terms, or anything from documents marked confidential.

STARTER PROMPTS 21 TO 32

- | | |
|--|--|
| <p>21 Remember this about me: I am a [role] at a [firm type] in [market], and my clients are [types]. Use it in every future draft.</p> <hr/> <p>22 Here are three emails I wrote. Describe my voice in five rules, then save those rules as how I write.</p> <hr/> <p>23 From now on, default every client email to under 150 words with one clear ask.</p> <hr/> <p>24 Ask me the ten onboarding questions a new assistant would ask in their first week. Save my answers.</p> <hr/> <p>25 What do you currently know about me? List everything so I can correct what is stale.</p> <hr/> <p>26 Never use these words in my drafts: [your list]. Add these rules: no exclamation points, no “synergy,” no “circle back.”</p> | <p>27 Save my three recurring outputs: weekly pipeline update, tour follow-up, and proposal cover letter. Ask me for a sample of each so you learn the format.</p> <hr/> <p>28 New default: when I paste meeting notes with no instructions, produce a recap email plus an action item list.</p> <hr/> <p>29 My audience priority: owners and developers first, brokers second. Calibrate every example and draft accordingly.</p> <hr/> <p>30 Draft custom instructions for me based on everything I have told you, under 150 words, ready to paste into my settings.</p> <hr/> <p>31 Quiz me: ask what you should never store about my clients. Save my answers as permanent boundaries.</p> <hr/> <p>32 Once a month I will say “audit your memory.” When I do, list everything saved and flag what looks outdated.</p> |
|--|--|

Give it an office

One project per pursuit, client, or campaign. Every conversation starts briefed.

THE MOVE

Create a project for each recurring responsibility and load it: the RFP, past proposals, brand guidelines, and two writing samples that sound like your company at its best. ChatGPT and Claude both call this a Project; Copilot calls it a notebook. Samples beat adjectives.

LEVEL 3 · GIVE IT AN OFFICE

THE PROMPT FRAMEWORK: THE PROJECT INSTRUCTIONS

This project is [pursuit / client / campaign]. Facts come only from the files in this project. Voice comes from the writing samples. Match the brand guidelines. End every draft by listing anything you could not confirm from the files.

STARTER PROMPTS 33 TO 48

- | | |
|---|---|
| <p>33 Read every file in this project and give me a one-page brief of what it now knows.</p> <hr/> <p>34 Using only the files in this project, draft the cover letter for our RFP response. Flag anything missing.</p> <hr/> <p>35 Draft a tour follow-up email for this property using the listing sheet in this project. My voice, under 120 words.</p> <hr/> <p>36 Write this project's instructions using the framework above. Show me the draft before saving.</p> <hr/> <p>37 Compare our draft proposal against the client's RFP in this project. Build the compliance checklist: every requirement, page limit, and deadline.</p> <hr/> <p>38 From the client correspondence in this project, summarize the relationship: wins, friction, and open promises.</p> <hr/> <p>39 Draft three LinkedIn posts about this development using only facts from the project files.</p> <hr/> <p>40 Write the "why us" section for this pursuit using our past wins in this project. Every claim needs a source file named.</p> | <p>41 Build a one-page stakeholder map for this pursuit: who decides, who influences, who can block.</p> <hr/> <p>42 Using the brand guidelines in this project, rewrite this paragraph until it passes as ours. Show both versions.</p> <hr/> <p>43 List every deadline, deliverable, and meeting mentioned across the files in this project, in date order.</p> <hr/> <p>44 Draft the client kickoff meeting outline from the signed proposal in this project.</p> <hr/> <p>45 What would a skeptical engineer ask about this project's claims? Answer each question from the files or flag it as unconfirmed.</p> <hr/> <p>46 Turn the site visit notes in this project into an owner-ready summary, with photo placements noted as placeholders.</p> <hr/> <p>47 Check this draft against everything in the project and list any fact that contradicts our files.</p> <hr/> <p>48 It is Friday. Summarize what changed in this pursuit this week and what Monday morning needs first.</p> |
|---|---|

Train it

Teach a process once. Use it forever.

THE MOVE

Find the tasks you repeat weekly and turn each into a trained task: a custom GPT, a skill, or saved instructions. Every trained task ends with the accuracy rule, because a flag today beats an apology tomorrow.

LEVEL 4 • TRAIN IT

THE PROMPT FRAMEWORK: THE TRAINED TASK

When I say [trigger phrase], follow these steps: [ordered steps]. Inputs I will give you: [what you paste]. Outputs, every time: [exact deliverables and format]. Boundaries: [what it must never do]. End every run with: “List anything you could not confirm from the source.”

STARTER PROMPTS 49 TO 68

- | | |
|--|--|
| <p>49 Read the attached property flyer. Produce three outputs: a 100-word email summary, a LinkedIn post under 80 words, and five call talking points. Facts come only from the flyer. End by listing anything you could not confirm.</p> <hr/> <p>50 I am meeting [name], [title] at [company] on [day]. From the notes I paste, build a one-page brief: three things to know, three questions to ask, one topic to avoid, one connection point. Flag what you could not confirm.</p> <hr/> <p>51 Below are my raw notes from today’s client meeting. Produce: a recap email under 150 words, an internal summary, and a task list with owners and dates. End with anything you could not confirm.</p> <hr/> <p>52 Read the attached RFP. First build the compliance checklist. Then draft the firm overview using our past proposal as the voice sample. Flag every place that needs a project example or number from us.</p> <hr/> <p>53 Learn my tour follow-up process: I paste notes, you produce the email, the CRM note, and the task list. Ask me questions first, then write the reusable instructions.</p> <hr/> <p>54 Build my weekly pipeline update as a repeatable task: I paste the raw list, you produce the leadership summary in my saved format.</p> <hr/> <p>55 Create the checklist you will run every time I say “proposal QA”: names spelled correctly, every number traced to a source, dates confirmed, voice check against my samples.</p> <hr/> <p>56 New trigger: “new listing.” When I say it, ask for the flyer, then produce the email blurb, LinkedIn post, broker one-liner, and website copy.</p> <hr/> <p>57 I typed out my process below. Turn it into step-by-step instructions you can follow every time, then show me a test run.</p> | <p>58 Standing order: every time I paste a transcript, produce minutes, decisions, action items with owners, and a draft follow-up email.</p> <hr/> <p>59 Design the intake questions you will ask me before drafting any case study, so I never start from a blank page again.</p> <hr/> <p>60 New trigger: “maintenance update.” When I say it, turn what I paste into a tenant notice, an owner email, and a work order note. End by listing anything you could not confirm.</p> <hr/> <p>61 Create a template for project win announcements: an internal version and a client-facing version built from the same facts.</p> <hr/> <p>62 New trigger: “prep the QBR.” Assemble a portfolio summary, open items, wins, and three discussion questions from what I paste.</p> <hr/> <p>63 Permanent rule: every output containing a number ends with a sources line telling me where each number came from.</p> <hr/> <p>64 Draft instructions for a pricing sanity-check assistant: it questions my assumptions and stress-tests my logic. The price decision stays mine.</p> <hr/> <p>65 Test yourself: run my property summary task on this flyer, then grade your own output against my checklist.</p> <hr/> <p>66 Build my conference follow-up machine: I paste business card photos and scribbled notes, you produce personalized follow-up emails.</p> <hr/> <p>67 Create my monthly market snapshot task: I paste three sources, you produce a client-ready email that cites each one.</p> <hr/> <p>68 Write the boundaries list for all my trained tasks: never invent square footage, never name competitors, never promise a date we have not confirmed.</p> |
|--|--|

Hand it the keys

Connected to your calendar, inbox, and notes. It goes and looks instead of asking you to paste.

THE MOVE

Connect your calendar, email, and meeting notes through your platform's connectors. Then stop copying and pasting your own life into a chat window. Review stays human for anything client-facing, any number, anything legal.

LEVEL 5 • HAND IT THE KEYS

THE PROMPT FRAMEWORK: THE CONNECTED REQUEST

Using my [calendar / inbox / meeting notes], do [task] for [timeframe or person]. Output: [format].
Draft only. Flag anything uncertain and anything that needs my decision.

STARTER PROMPTS 69 TO 88

- | | |
|--|--|
| <p>69 Prep me for tomorrow using my calendar, emails, and meeting notes. One page: schedule, prep per meeting, and what I owe people.</p> <hr/> <p>70 Scan my inbox from the last week. What needs a reply, what can wait, and what did I promise and forget?</p> <hr/> <p>71 Look at Thursday's calendar and draft prep notes for each external meeting.</p> <hr/> <p>72 Find every email thread with [client] from the last 90 days and summarize where the relationship stands.</p> <hr/> <p>73 Which meetings on my calendar next week have no agenda? Draft one for each.</p> <hr/> <p>74 Pull my notes from today's [meeting] and turn them into the recap email we discussed in the room.</p> <hr/> <p>75 Find two hours on my calendar this week for proposal writing, in slots that move nothing important.</p> <hr/> <p>76 Cross-reference my calendar and inbox: which prospects have gone quiet since our last meeting?</p> <hr/> <p>77 Show me everything on my plate for [pursuit] across email, calendar, and notes, in one view.</p> <hr/> <p>78 Before my 10 AM, check for overnight emails from the attendees and update my meeting brief.</p> | <p>79 Draft replies to my three oldest unanswered emails. I will edit before anything sends.</p> <hr/> <p>80 What did I commit to in meetings this week that has no calendar time attached? List each and propose a slot.</p> <hr/> <p>81 Find the email where [client] mentioned their budget timing and quote it back to me exactly.</p> <hr/> <p>82 Review my last five tour follow-ups in sent mail. Which patterns got replies, and which got silence?</p> <hr/> <p>83 Summarize this week's client conversations and tell me what Monday needs first.</p> <hr/> <p>84 Check my calendar against my priorities list: what am I spending time on that appears on neither?</p> <hr/> <p>85 Draft the agenda email for next week's project meeting using the open items from this week's notes.</p> <hr/> <p>86 Search my notes for every mention of [topic] this quarter and build a one-page history.</p> <hr/> <p>87 Who in my key relationships have I gone 60+ days without contacting? Draft a light check-in for each.</p> <hr/> <p>88 Morning of a big pitch: pull every interaction with this prospect into one brief I can read in five minutes.</p> |
|--|--|

Put it on the org chart

Standing responsibilities on a schedule. The briefing is waiting before you sit down.

THE MOVE

Take your best connected requests from Level 5 and put them on a schedule. This is where the work starts arriving before you ask for it. Every standing job delivers drafts, flags uncertainty, and sends nothing without you.

LEVEL 6 · PUT IT ON THE ORG CHART

THE PROMPT FRAMEWORK: THE STANDING ORDER

Every [day / time], do [job] using [sources]. Deliver: [format]. Rules: drafts only, flag what you could not confirm, list what needs my decision, and never send anything on my behalf.

STARTER PROMPTS 89 TO 100

- | | |
|--|---|
| <p>89 Every weekday at 7 AM: build my morning briefing. Today's schedule, prep per meeting, inbox triage, and anything flagged for my decision.</p> <hr/> | <p>95 Weekly: audit my calendar two weeks out and flag conflicts, missing agendas, and back-to-back days with no margin.</p> <hr/> |
| <p>90 Every Monday at 8 AM: my week ahead. Meetings that need prep, deadlines, and the three things that matter most.</p> <hr/> | <p>96 Monthly: review my trained tasks and tell me which instructions look stale, based on how often I corrected you.</p> <hr/> |
| <p>91 Every Friday at 3 PM: draft my weekly leadership update from this week's activity. I review before it goes anywhere.</p> <hr/> | <p>97 Every morning: check industry news from my saved sources and give me two items worth mentioning in client conversations, with links.</p> <hr/> |
| <p>92 First business day of each month: assemble the market snapshot from my saved sources and draft the client email.</p> <hr/> | <p>98 Quarterly, per key client: assemble the QBR starter pack. Activity summary, wins, open items, and a draft agenda.</p> <hr/> |
| <p>93 Every Thursday: scan the pipeline and flag every pursuit with no activity in 14 days, with a suggested next touch.</p> <hr/> | <p>99 Sunday evening: prep Monday's business development block. Five prospects, talking points, and draft openers.</p> <hr/> |
| <p>94 Daily at 4:30 PM: list what I promised today and what tomorrow's first hour should be.</p> | <p>100 The standing rule above every scheduled job: deliver drafts, flag uncertainties, and never send anything without me.</p> |

Go up exactly one level this week.

You found your level on page 2. The next one up is a 30-minute move, and every prompt you need is in this guide. Start tonight with the first prompt at your new level.

This field guide comes from the BUILD AI Institute, Nerd Herd's AI education program for commercial real estate, HVAC, and AEC professionals. When you are ready to build past Level 6, that is where it happens.

[NERDHERDPRO.COM/AI-EDUCATION](https://nerdherdpro.com/ai-education)