

# DITCHING THE STATIC CMA



*Using AI to Accelerate Trust,  
Boost Conversions, and Win  
Listings Faster*

**Beatrix** Whipple



The Whipple Group



Keller Williams  
Pacific Estates



@beatrix\_whipple  
@thewhipplegroup

# AGENT PROFILE

Beatrix Whipple and The Whipple Group don't just claim innovation—they deliver it at every step. By merging powerful AI systems with boutique, client-first service, Beatrix has transformed real estate's biggest pain points into her competitive edge. **The team's relentless follow-up, deep local expertise, and data-driven efficiency have driven a 50% jump in conversion, more listings, and faster closings.**



**Long Beach, CA**  
PRIMARY MARKET



**\$850,000**  
AVERAGE PRICE  
POINT



**23**  
YEARS IN REAL  
ESTATE

## 2024 PRODUCTION STATS

**46**

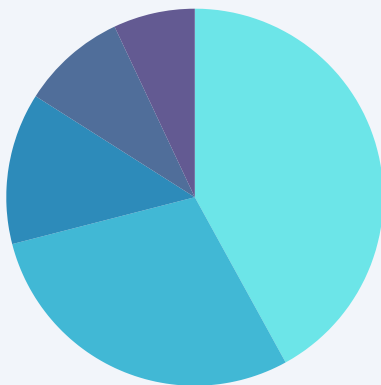
2024 TRANSACTIONS

**\$46,767,990**

2024 SALES VOLUME

**\$1,044,613**

2024 GCI  
TEAM PRODUCTION



## TOP LEAD SOURCES

- ZILLOW: 42%
- CLIENT REFERRAL: 29%
- OPEN HOUSE: 13%
- FARM: 9%
- WEBSITE/SOCIAL: 7%

## PRODUCTION

**40%**  
BUYERS

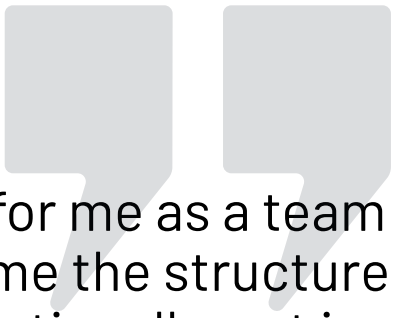
**60%**  
LISTINGS

## TEAM SIZE

**4**  
AGENTS

**2**  
STAFF

# BEATRIX ON COACHING



“Coaching has been a game-changer for me as a team leader and business owner. It’s given me the structure and accountability I need to grow intentionally, not just reactively.

Having someone in my corner who understands the real estate landscape and can challenge my blind spots has elevated both my mindset and my strategy.

**Through coaching, I’ve been able to scale The Whipple Group with more clarity, develop stronger systems, and empower my agents to step into their own leadership.**

It’s not just about production, it’s about building a business that’s sustainable, values-driven, and forward-thinking.”

# BY THE NUMBERS

**50%**

Increase in conversion  
rate on listing  
appointments and CMAs

**75%**

Reduction in time  
spent on preparing  
CMAs

**40%**

Decrease in response  
time, allowing for more  
active contracts

**30%**

Increase in active listings

**\$1.8M**

Fourplex listing won using AI-powered  
video + summary email

**12%**

Increase in average price point

**22%**

Increase in web traffic





# THE STORY

Beatrix Whipple has built her reputation by refusing to blend in with the crowd. In a market full of generic CMAs and slow responses, she's turned every part of the client journey into **a showcase to establish trust with clients faster—delivering answers, insights, and next steps before anyone else can.**

When a new lead comes in, Beatrix delivers a custom Loom video that walks clients through comps, pricing logic, and strategy. AI steps in, transforming each video into a crisp, actionable summary that every decision maker can scan, share, and reference with ease.

But Beatrix doesn't just use AI for speed—she uses it for depth. From digging into MLS records and HOA docs to analyzing off-market data, her AI tools surface trends, spot outliers, and create visually sharp reports that answer the “why” before it's ever asked.

**Clients feel the difference instantly: they get both the warmth of a personal touch and the clarity of rock-solid, data-driven answers.**

The results speak for themselves: conversion rates up 50%, listing prep time down 75%, active listings up 30%, and even complex, high-value deals (like a \$1.8M fourplex) in her win column. By weaving AI into every touchpoint, Beatrix Whipple has set a new standard for what real service looks like.

# THE STRATEGY

## Create Hyper-Personalized Video CMAs

Beatrix never sends a faceless report. Every CMA starts with a screen-recorded Loom video, walking the lead through comps, market trends, pricing logic, and her own analysis—so the seller or buyer feels seen, not sold to.

*Goal: Build instant credibility and set the tone for real, transparent partnership.*

## Use AI to Summarize and Reinforce the Message

After every video, Beatrix runs the transcript through AI to generate a tight, written summary. No more “lost in translation” moments—every key point is captured for anyone who prefers to read, skim, or reference later.

*Goal: Ensure nothing falls through the cracks—every decision-maker is on the same page.*

## Deep-Dive Research to Meet Every Client's Needs

Beatrix dives into the MLS, parses public records, even reviews previous agent notes, HOA docs, and local market anomalies. She leverages AI platforms like Revii AI and ChatGPT to spot outliers, analyze trends, and build graphs that answer why a property is valued the way it is.

*Goal: Deliver a custom-fit solution—never a one-size-fits-all pitch.*

## Deliver the Dual Experience—Visual + Analytical

Clients get both: a friendly, high-energy video for context and warmth, plus a crystal-clear, AI-backed summary and visual market data for credibility. This two-pronged approach makes it easy for anyone—techie or not—to engage and act quickly.

*Goal: Convert more leads by speaking to every learning style and decision process.*

# TECH STACK

Name	Description
Loom Video	Walk clients through comps and pricing logic with screen-share videos.
ChatGPT	Turns Loom transcripts into polished email summaries and compelling visuals, analyses transaction documents for key insights.
Revii AI	Use for deep research, summaries, and MLS analysis.

# 3 THINGS YOU CAN DO NOW

- 01 Cut the canned emails**—send a custom screen-share video for every price opinion or pitch. Walk your leads through comps and strategy in your own voice, so they see you as an expert, not just a messenger.
- 02 Follow every video with an AI-powered written summary** that hits all the highlights. Use AI to turn your video into a clear, skimmable email, so busy clients (and every decision maker) get the full story, fast.
- 03 Don't just comp—do the homework.** Use AI to deep-dive into your MLS, spot outlier data, build visual graphs, and surface insights that answer the “why”.

## Full Case Studies & Tools for Coaching Members

Tom Ferry Coaching members get exclusive access to the entire library of 100+ real-world case studies plus every template, script, AI prompt, and toolkit—covering every critical aspect of building a successful real estate business.

# 6 THINGS BEATRIX WILL DO GOING FORWARD

- 01** Shift from **"messaging around"** to **"mission driven"** by building AI systems in marketing, prep, and onboarding.
- 02** **Train her entire team** to craft smart, authentic prompts and use AI daily.
- 03** Generate **hyper-custom client materials**—timelines, education, updates—that feel handcrafted.
- 04** **Turn content creation into a smooth banked system**—from posts to email nurture—with AI at the core.
- 05** Begin using **AI analytics** to audit CRM performance, lead source ROI, and pitch success—zero opportunities fall through.
- 06** **Work with her Tom Ferry coach** to help keep her accountable and to help her implement these ideas!



# TOOLKIT ITEMS

Practical tools to help you put this AI strategy into action.

- 1** Prompt: Loom Video Summary
- 2** Prompts: Transaction Timelines
- 3** Prompt: HOA Document Analyzer
- 4** Prompt: Inspection Report Summarizer
- 5** Prompt: Home Value Analyzer & Graphs

PROMPT

# LOOM VIDEO SUMMARY

Summarize the following Loom video and email in a clear, concise, and professional tone that reflects my voice: confident, approachable, and strategic. The summary should highlight key takeaways, action items, and any next steps in a way that's easy for clients or team members to quickly absorb and reference. Keep it under 150 words and maintain a warm, polished tone. **(add loom video)**



## PROMPTS

# TRANSACTION TIMELINES

## Create a buyer transaction timeline:

Create a detailed, week-by-week transaction timeline for a homebuyer based on the following information: contract acceptance date, contingency deadlines (inspection, appraisal, and loan), close of escrow date, and key milestones such as earnest money deposit, loan application, home inspection, appraisal appointment, loan approval, final walkthrough, and closing. Format the timeline clearly using headers and bullet points, and write it in a way that is easy for a buyer to understand and follow.



## Create a seller transaction timeline:

Create a detailed, week-by-week transaction timeline for a home seller based on the following information: contract acceptance date, buyer's contingency periods (inspection, appraisal, and loan), close of escrow date, and key milestones such as disclosures, repairs (if any), buyer inspections, final walkthrough, and close. Include notes on seller responsibilities and timing for potential rent-back if applicable. Format it clearly with headers and bullet points for easy sharing with the seller.



PROMPT

# HOA DOCUMENT ANALYZER

Review the following HOA documents and provide a clear summary of key information for a homebuyer. Highlight important points like monthly dues, special assessments, pet policies, parking, insurance coverage, maintenance responsibilities, financial health of the HOA (including reserve study if available), and any red flags or unusual rules. Use plain language suitable for a non-expert client. **(add HOA documents)**



PROMPT

# INSPECTION REPORT SUMMARIZER

Summarize this home inspection report in a client-friendly format. Highlight major findings, safety concerns, and any items that may require repair or further investigation. Group findings by system (e.g., electrical, plumbing, roof), and clearly distinguish between routine maintenance items and issues of concern. Keep it concise, clear, and professional.

**(add home inspection report)**





PROMPT

# HOME VALUE ANALYZER & GRAPHS

Using the following comparable sales data, analyze the estimated market value of a property. Include graphs showing price trends, days on market, and overall market absorption rate. Compare features such as bed/bath count, lot size, upgrades, and condition relative to the subject property. Factor in timelines to show appreciation and recent market trends to highlight shifts in buyer demand or pricing power. Identify any outlier comps and explain whether they should be included or excluded from the analysis. Provide a written pricing recommendation supported by both data and current market trajectory. **(add sales data)**

