

Find your next deal in the contacts you already have

Four steps to clean and mine your sphere with Claude.



1 Export your database

From your CRM: export your contacts as a CSV or Excel file, with these fields:

Name Address Phone Email Notes Tags Lead source Closing dates Last contact

From your phone: export at icloud.com/contacts (iPhone) or contacts.google.com (Android).

Thin notes in your CRM? Add a “How I know them” column



Claude can only work with what's in your file. If all you have is names and emails, it can't tell your sister from an open house sign-in. Add a few words for each person, like “past client 2024,” “gym friend,” or “sister-in-law,” and Claude can sort them into the right tier.

2 Clean it with Claude

Upload your file and paste this prompt.

You're an expert in organizing real estate CRM data. I'm a real estate agent in Las Vegas, and attached is my contact export. Merge duplicates, format phone numbers as 702-555-1234, and flag missing or invalid emails. Don't delete anyone. Add a Tier column: A = has referred me or would without being asked; B = knows and likes me; C = knows of me. Use my How I know them column, notes, tags, and lead source. If you're unsure, mark them “Review.” Ask me any questions before you start. Give me an Excel file with tabs for A, B, C, Review, and Missing Email.

3 Mine this week's calls

Stay in the same chat.

From my A and B tabs, build a call sheet for the rest of this quarter. I work Monday through Friday and I'm off [dates]. Split the calls evenly, A's first, as a table with the date, name, phone, and one reason to call from my notes.

Keep it safe: never upload Social Security numbers, loan or financial details, or transaction documents, and follow your brokerage's data and privacy policies. AI drafts; you personalize.

4 Find who's ready to move

Offer 5–10 year owners an equity review.

Using my closing-date column, find past clients who bought 5 to 10 years ago. Sort oldest first, and add years owned and home anniversary month. Put them on a tab called Equity Reviews, and list anyone with no closing date separately.

Does your brokerage train you on AI?

If not, let's talk. Book a confidential VIP call with Matt Mullin, Head of Strategic Growth & Talent Development.

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