THE BROKER TIMES

QUICKSTART GUIDE

Claude AI Skills for Brokers

thebrokertimes.com.au

WHAT'S IN YOUR PACK

Each .md file is a skill — a set of expert instructions that tells Claude exactly how to help you with a specific broker task. Drop them into a Claude Project once and they work forever.

Compliance Pack

BID Statement Writer • File Note Writer • Document Checklist Generator • NCCP Audit Reviewer • Privacy & Consent Docs

Growth Pack

AFG Flex Lead Formatter • Pipeline Summariser • Client Nurture Sequence • Annual Review Generator • Referral Pitch Deck Content

Productivity Pack

Credit Memo Generator • Lender Submission Packager • Rate Change Summariser • Commission Tracker • Meeting Notes to Actions

Integration Pack

Apify Lead Finder • Bank Statement Interpreter • Quickli Data Formatter • BrokerBuddie Lead Connector • AFG Flex Import/Export

“Your pack also includes a copy-paste prompt library, Make.com & Zapier automation blueprints, and a CRM field-mapping spreadsheet.”

INSTALL IN 2 MINUTES

Recommended: Claude Projects

1. Go to claude.ai and log in (free or paid account)
2. Click "Projects" in the left sidebar
3. Click "Create project" — name it "Broker Skills"
4. Click "Add content" → "Add instructions"
5. Open a SKILL.md file in any text editor, copy everything, paste into the instructions box
6. Click Done — start a chat inside that Project

Quick Paste (no setup)

Open any Claude chat, paste the SKILL.md contents at the top of your message, then type your prompt below it.

Claude Desktop App

Create a Project (same steps as above), or drag and drop .md files directly into any conversation window.

Claude Code (Terminal)

```
mkdir -p ~/.claude/skills && cp *.md ~/.claude/skills/
```

RUN YOUR FIRST FILE

1. Load the Compliance Pack SKILL.md into your Claude Project
2. Start a new chat inside that Project
3. Open Compliance-Pack-Prompts.md from the prompts folder
4. Copy the "Generate BID Statement — Purchase" prompt
5. Paste it into Claude, fill in the [bracketed] fields with your client's details
6. Claude generates a structured BID statement in about 60 seconds
7. Review it, correct it, sign it off

> ★ **Pro Tip**
>
> Every output is a first draft for you to review. The skill removes the typing, not the thinking — your judgement and sign-off stay exactly where they belong.

AUTOMATIONS & SUPPORT

Automation Blueprints

Your /automations folder contains importable scenarios for Make.com and Zapier.

Included blueprints: lead ingestion, document chase reminders, and settlement milestone notifications.

Import into Make.com or Zapier, connect your accounts, and replace the YOUR_... placeholders with your credentials.

CRM Field Mapping

Open CRM-Field-Mapping.xlsx for field mappings across Lendflow, HubSpot, Pipedrive, GoHighLevel, and Salesforce.

> **Need Help?**
>
> Email: matt@thebrokertimes.com.au
>
> **thebrokertimes.com.au/claude-skills**

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