

THE LEGACY CONTENT AUDIT CHECKLIST

**DECIDE WHAT TO REFRESH. WHAT TO REBUILD.
WHAT TO RETIRE.**

*A ten-question scoring framework for every deck, handout,
and workbook in your library.*

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BEATS Conference 2026 | Oklahoma City

How to Use This Checklist

Every educator has a library of older content. Decks from 2019. Handouts from before the 2024 settlement. Workbooks with references to tools that no longer exist. Some of it is still gold. Some of it is actively hurting your credibility every time you teach it.

This checklist is a ten-question scoring framework that helps you decide, fast, what to do with each piece of legacy content. Refresh it. Rebuild it. Or retire it.

The Process

- Pick one asset. A single deck, handout, or workbook. Do not try to audit your whole library at once.
- Fill in the asset identification page. Know what you are scoring.
- Score each of the ten questions on a 1 to 5 scale. Be honest, not defensive.
- Add up your total. Use the Priority Tier chart to decide your next move.
- Document the top three priorities. Assign an owner and a deadline.

The Scoring Scale

Every question scores the same way.

SCORE	MEANING	RECOMMENDED ACTION
1	Needs Rebuild	Pull from rotation. Rebuild from scratch with current framing.
2	Major Overhaul	Core idea still holds. Most supporting material needs replacement.
3	Refresh	Structure is sound. Modernize design, language, and examples with Claude Cowork.
4	Minor Updates	Solid asset. Quick updates to data or examples. Keep teaching it.
5	Current	Good as-is. No action needed. Revisit in 12 months.

Your library is not precious. Your audience is. Retire anything that no longer serves them.

Asset Identification

Fill this in before you start scoring. If you cannot answer these questions cleanly, that is its own signal.

ASSET NAME	
ORIGINAL DATE	
LAST TAUGHT	
FORMAT	<input type="checkbox"/> Slide deck <input type="checkbox"/> Handout <input type="checkbox"/> Workbook <input type="checkbox"/> Video <input type="checkbox"/> Other: _____
REVIEWED BY	
REVIEW DATE	

What is the purpose of this asset? What does it teach?

Who is the intended audience? (Persona, experience level, role)

How often is this asset currently taught or distributed?

Section 1: Accuracy and Compliance

If the content is wrong, nothing else matters. Start here.

ACCURACY AND COMPLIANCE

Legal, regulatory, factual, and data integrity.

Q1. Is every legal and regulatory reference still current?

Check state code citations, NAR Code of Ethics references, settlement-era rule changes, buyer representation requirements, fair housing language, and agency disclosure rules. A 4 or 5 means you have verified in the last 12 months.

SCORE 1 Needs Rebuild 2 3 Refresh 4 5 Current

NOTES

Q2. Is every statistic, data point, and citation still accurate?

Look for "according to NAR," median price data, market trend claims, demographic statistics, and any number older than 24 months. If you cannot name the source, it probably needs to go.

SCORE 1 Needs Rebuild 2 3 Refresh 4 5 Current

NOTES

Q3. Is the language fair housing safe and free from protected class missteps?

Check for "dream home" (do not use), "exclusive neighborhood," "perfect for families," or any descriptor that could be read as steering. Older content is especially prone to this. Score harshly.

SCORE 1 Needs Rebuild 2 3 Refresh 4 5 Current

NOTES

Section 2: Relevance and Context

RELEVANCE AND CONTEXT

Does the content still match today's market, tools, and consumer?

Q4. Do the examples, scenarios, and case studies still resonate with today's learner?

A scenario set in 2015 about a three percent interest rate is not just outdated, it is unhelpful. Same for references to tools that no longer exist, offices that closed, or market conditions that have reversed.

SCORE 1 Needs Rebuild 2 3 Refresh 4 5 Current

NOTES

Q5. Does the content acknowledge the current technology and AI landscape?

If your content does not mention AI, modern CRMs, portals like Zillow in their current form, or post-settlement buyer agreement workflows, it is teaching last decade's business.

SCORE 1 Needs Rebuild 2 3 Refresh 4 5 Current

NOTES

Q6. Is the tone and language current, or does it feel dated?

Look for buzzwords that have aged poorly, assumptions about how consumers behave, gendered language, and phrasing that belongs to a different era of real estate.

SCORE 1 Needs Rebuild 2 3 Refresh 4 5 Current

NOTES

Section 3: Design and Delivery

Old design makes new content look old. Even accurate material gets dismissed when it looks like a 2012 PowerPoint template.

DESIGN AND DELIVERY

Visual quality, structure, and modern presentation standards.

Q7. Does the visual design reflect current standards?

Look at fonts, slide layouts, photo quality, icon style, color palette, and slide density. If it looks like it was built before 2020, it probably was. That sends a signal to your audience.

SCORE 1 Needs Rebuild 2 3 Refresh 4 5 Current

NOTES

Q8. Is the structure tight, or does it meander?

Count the number of slides or pages. Look for bloat. Older content often has filler slides, redundant examples, or a build-up that no longer serves the learning outcome. Shorter and sharper almost always wins.

SCORE 1 Needs Rebuild 2 3 Refresh 4 5 Current

NOTES

Section 4: Voice and Value

This is where legacy content most often fails. It was built by a different version of you, teaching to a different audience.

VOICE AND VALUE

Does this sound like you today, and does it deliver real takeaway?

Q9. Does this content sound like your current voice as an educator?

Read it out loud. If you would not say it this way on stage today, it needs a rewrite. Your voice evolves. Your content should too.

SCORE 1 Needs Rebuild 2 3 Refresh 4 5 Current

NOTES

Q10. Does this content still deliver a clear, defensible takeaway?

At the end of this lesson, can a learner walk out with one specific thing they can do differently? If not, the content has lost its job. Abstract content ages fastest of all.

SCORE 1 Needs Rebuild 2 3 Refresh 4 5 Current

NOTES

Score Your Asset

Add up your scores from all ten questions. Use the chart below to decide your next move.

FINAL VERDICT

TOTAL SCORE (sum of all 10 questions, max 50): _____ / 50

PRIORITY TIER (based on total score)

- 10–20: REBUILD.** Pull from rotation. Start from scratch with the curriculum production team.
- 21–35: REFRESH.** Strong candidate for Claude Cowork. Modernize design, language, and examples.
- 36–50: MAINTAIN.** Minor updates only. Keep teaching it. Re-audit in 12 months.

TOP THREE PRIORITIES FOR THIS ASSET

1.

2.

3.

What To Do Next

Your score points you to a path. The path points you to a tool. Here is how to use the curriculum production team to execute whatever the checklist told you to do.

If You Scored 10 to 20: Rebuild

Do not patch this. Start over. The asset is not serving the audience.

- Pull the original from active rotation. Archive it, do not delete it.
- Open your Claude Project and draft a fresh outline using your Teaching Philosophy and Learner Personas as context.
- Use NotebookLM to gather current research and data points.
- Use Canva AI 2.0 to generate a new deck in your current brand system.
- Record and iterate the first delivery. Add the transcript back to your institutional knowledge base.

If You Scored 21 to 35: Refresh

The bones are good. The surface is tired. This is the sweet spot for Claude Cowork.

- Open the asset in Claude Cowork with a clear brief on what is dated.
- Ask for a modernization pass on design, data, language, and examples.
- Review the output with judgment. Keep what works. Push back on what drifts from your voice.
- Cross-reference the refreshed version against your Teaching Philosophy before you redeploy.
- Add the refreshed version to your Claude Project so it becomes part of your knowledge base.

If You Scored 36 to 50: Maintain

This is a strong asset. Protect it. But do not get lazy.

- Log the review date so you know when to audit next (12 months out is a reasonable cadence).
- Update the one or two data points or examples flagged in your notes.
- Keep teaching it. Keep capturing transcripts when you do. Feed those back to your Claude Project.
- Consider whether this asset can be repurposed into other formats (short video, blog post, infographic) using NotebookLM or Canva AI 2.0.

Warning Signs You Scored Too Generously

Auditors get attached to their own work. It is human. Here are the red flags that your score is probably two points too high.

- You have taught this asset the same way for three or more years without change.
- You feel defensive reading any of the ten questions.
- The last time you updated it, you changed the footer date and nothing else.
- You cannot remember where the underlying data came from.
- You find yourself skipping certain slides when you teach it because they feel off.
- Attendee feedback has hinted at it being dated but you have not acted on it.

If any two of those apply, drop your total score by three points and re-read your verdict.

Your Claude Cowork Starter Prompt

Copy, paste, and adjust. Use this after you have decided a Refresh is the right move.

I am refreshing a legacy training asset. Here is the context you need before you start.

Asset name: [title]

Original date: [year]

Audience: [persona, experience level, role]

Core purpose: [what the asset teaches]

Based on my audit, here is where it scored weakest: [paste your top three priorities from the Final Verdict].

Please modernize this asset without changing its core intent or my expertise. Specifically:

1. Flag any legal, regulatory, or data claims that are likely outdated.
2. Suggest current examples, scenarios, or case studies to replace dated ones.
3. Tighten language and trim filler. Target a shorter, sharper version.
4. Rewrite in my current voice based on the materials in my Teaching Knowledge Base Project.
5. Flag anything you think I should retire entirely rather than refresh. Be honest.

Do not produce the final version yet. Give me your refresh plan first, and I will approve before you execute.

Never let a tool execute a full refresh without a plan. Approve the approach. Then approve the output. Then teach it.

Final Word

A library of legacy content is not an asset by default. It is only an asset when it still serves the learners walking into your room today. Everything else is inventory.

Run this checklist on one asset this week. Run it on another next week. Within a quarter, your library will reflect your current standards, your current voice, and your current expertise.

The goal is not to refresh everything. The goal is to know exactly what is working and what is not, so every time you teach, your credibility is on the line the way it should be. Earned.

Old content does not make you experienced. Current content backed by years of expertise does.

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Produced for the BEATS Conference 2026