

## Give AI a try: Session 2 activities

### Activity 1: Analyze communications

Use AI to identify customer confusion and improve clarity.

#### Instructions:

**1. Find a communication** you send to customers (examples: coverage update, education, etc.) that you would like to improve. Remove any customer information or sensitive agency data from the message.

**2. Copy and paste** below into your AI tool. (Just copy and paste it. Don't hit 'enter' yet.)

*Act as an experienced insurance advisor focused on client education and retention.*

*You are reviewing client-facing message(s) used by our agency to communicate about coverage, renewals, or policy changes.*

*Analyze the communication below and identify where a typical insurance client may feel confused, frustrated, uncertain, or hesitant to respond.*

*For each issue:*

- Describe what the client may be thinking or feeling
- Explain why the confusion or friction may occur (e.g., assumptions, jargon, timing, missing context)
- Note the agent's likely intent vs. how the client may interpret it

*Focus on clarity, trust, and decision confidence—not sales effectiveness. Use concise bullet points. Do not rewrite the message.*

*Use a practical, constructive tone, as if helping a colleague reduce client confusion and follow-up questions.*

**3. Attach or paste the anonymized communication** you chose in step 1 into the prompt.

**4. Run the prompt!** (Hit 'enter')

**5. Once the AI responds, ask AI to revise the communication** based on its analysis. This is the prompt you can use:

*Based on your analysis, improve the communication to the client.*

**6. Remember to review** the AI results!

Continued on next page

## Activity 2: Test engagement factors

Use AI to identify the best subject lines, length, tone, and call-to-action.

### Instructions:

1. **Choose a scenario or topic** you communicate about. (Insurance review, renewal, coverage explanation, etc.)
2. **Complete the prompt below** by filling in the blanks. If possible, include an example of content or messages you've sent (anonymized) for best results.

*Act as a(n) experienced insurance agent and client communication strategist who prioritizes trust and long-term relationships.*

*You are helping me with creating a message to a client regarding [TOPIC].*

*Please analyze [INCLUDE YOUR EXAMPLE EMAIL OR CONTENT] and recommend:*

- *The best subject line options (if applicable)*
- *The optimal message length*
- *The most effective tone and framing*
- *The optimal placement and wording of the call-to-action*

*Then produce a sample message that follows those recommendations.*

*Keep the message clear and focused on being helpful.*

*Use a friendly, professional, advisor-style tone. Make it sound human, conversational, and like it came from a real insurance agent... not a marketing department.*

3. **Run the prompt!** (Hit 'enter')
4. **Identify one insight** from the output that you could use to enhance your message.

## Activity 3: Educate clients

Use AI to help you explain complex insurance concepts in ways that are clear and simple.

### Instructions:

1. **Read the customer's question:** *"I don't really understand my deductible. Is that what insurance pays, or what I pay? And do I have to pay that every year?"*
2. **Ask AI to create a clear explanation** using this prompt:

*Act as a trusted insurance advisor.*  
*A client doesn't understand how deductibles work.*  
*Explain it in plain language using a real-world example.*  
*Don't use insurance jargon, and don't sell.*  
*Use an educational and reassuring tone.*
3. **Next, ask AI to create:**
  - A call script
  - An FAQ document