

Session 2 prompts

See the use cases below for prompts you can copy and paste and edit for your own use.

Analyze your existing communications to measure effectiveness

Prompt:

Act as an experienced insurance advisor focused on client education and retention. You are reviewing client-facing message(s) used by our agency.

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. Use concise bullet points.

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

[PASTE THE MESSAGE(S) OR DESCRIPTION(S) HERE]

Then, based on your analysis, improve the communication(s) to the client.

Create message sequencing for prospecting

Topic: Prospecting – quote request goes quiet

Prompt:

I'm an independent insurance agent working with [line of business] prospects.

When a prospect doesn't respond after an initial quote or conversation, what is the recommended follow-up strategy?

Please include:

- *The ideal number of follow-up communications*
- *A suggested timeline/cadence*
- *Recommended channels (call, email, text, etc.)*
- *Examples of what to say at different stages (early follow-up, mid-cycle, final message)*
- *Guidance on when to stop active follow-up and move the prospect into nurture*

Keep the advice practical and tailored to [line of business] insurance, not generic sales.

Continued on next page

Test messages for best engagement results

Prompt:

Act as an 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 [EXAMPLE CONTENT OR EMAIL] 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.

Prep for client conversations or messages

Topic: Client education – explaining coverage

Prompt:

Act as a trusted personal insurance advisor.

A [LINE OF BUSINESS] client thinks [INSURANCE OR COVERAGE TYPE] is unnecessary or doesn't understand it.

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.

Close retention gaps with timely retention messages

Topic: new client welcome series

Prompt:

Act as an experienced independent insurance agency communications specialist.

You are helping me create a new client welcome kit for my independent insurance agency. This welcome kit should be delivered as a short drip campaign sent over the first 30 days of the client relationship. The goal is to build trust, set expectations, educate clients, and encourage engagement – not to sell additional products.

Create a multi-message welcome drip campaign where each message focuses on a different topic. Include the following messages, in this order:

- 1. A warm welcome and thank you letter from the agency or principal*
- 2. An introduction to the agency and/or staff*
- 3. How clients can access self-service tools and manage their policy*
- 4. General information on how claims are reported and what to expect*

5. A request to leave an online review
6. A referral request that feels natural and relationship-based

For each message, include:

- Suggested send timing (ex: Day 0, Day 5, etc.)
- Email subject line
- Email body content

Keep each email under 200 words. Use plain, jargon-free language. Assume the client is new and may not fully understand insurance terminology.

Use a friendly, professional, local advisor tone. The writing should feel reassuring, and trustworthy and should show that we value long-term relationships. Keep the focus on clarity, confidence, and making the client feel supported.

NOTE: Remove any of the six messages as is appropriate for your agency. Additionally, add any additional drip messages you'd like, such as a message asking customers to follow your social accounts.

Topic: Client renewal follow-up message/email

Prompt:

Act as an experienced independent insurance producer.

I just had a conversation with a client about a [renewal].

Draft a short follow-up message that:

- Recaps what we discussed
- Clearly states the next step

Keep it under 150 words and be sure to reinforce the value of working with an independent agent.

The message should be friendly, calm, advisor-focused – not salesy.

[Attach/include anonymized details]

Topic: Cross-sell message

Prompt:

Act as an experienced [LINE OF BUSINESS] insurance advisor.

I'm reaching out to existing [LINE OF BUSINESS] clients who are missing [TYPE OF COVERAGE]. They rely heavily on email and cloud-based systems and do not currently have cyber liability insurance.

Write a short, educational email explaining what [TYPE OF COVERAGE] is and why it may be worth reviewing based on their current circumstances.

- Under 150 words
- No pricing, savings, or scare tactics
- Do not imply current coverage is "wrong"
- Keep the message educational and advisory

The message should sound professional, calm, and consultative. Please include a call to action to have the client call or schedule time with me and include a placeholder for a calendar link.