



AI FOR INSURANCE AGENTS

How to Work Smarter, Scale Faster, and Stay Ahead

Discover **5 ways** agents are using AI to simplify workflows, connect with more clients, and grow their business — with PSM as their guide.



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Building Your Foundation: Getting Ready for AI

Before diving into new tools, it's important to start with strategy.

AI works best when you know what problems you want it to solve. Start by looking at your daily routine. Where are you spending time on repetitive tasks — follow-ups, data entry, appointment reminders, or outreach that could be automated? Those are your first opportunities for improvement.

Next, take inventory of your tech stack. You probably already use systems like SunFire, a CRM, or an email marketing platform. The goal isn't to replace these tools — it's to connect them so they talk to each other and share data automatically.

At PSM, our role is to help agents see the big picture — how these systems can work together to reduce busywork and free up more time to sell.





Lead Generation & Prospecting: Turning Interest Into Opportunity

AI has completely changed how agents find and qualify prospects.

Instead of cold calls and spreadsheets, you can now use tools that work quietly in the background – sorting leads, prioritizing the best ones, and even starting conversations for you. Think of it as having a virtual assistant who never sleeps.

Chatbots or smart forms on your website can capture inquiries 24/7, while automated follow-up messages keep new leads engaged until you're ready to step in.

The goal isn't to replace your outreach – it's to make every conversation more meaningful. When AI handles the first few steps, you can spend your energy where it counts: building trust and closing sales.



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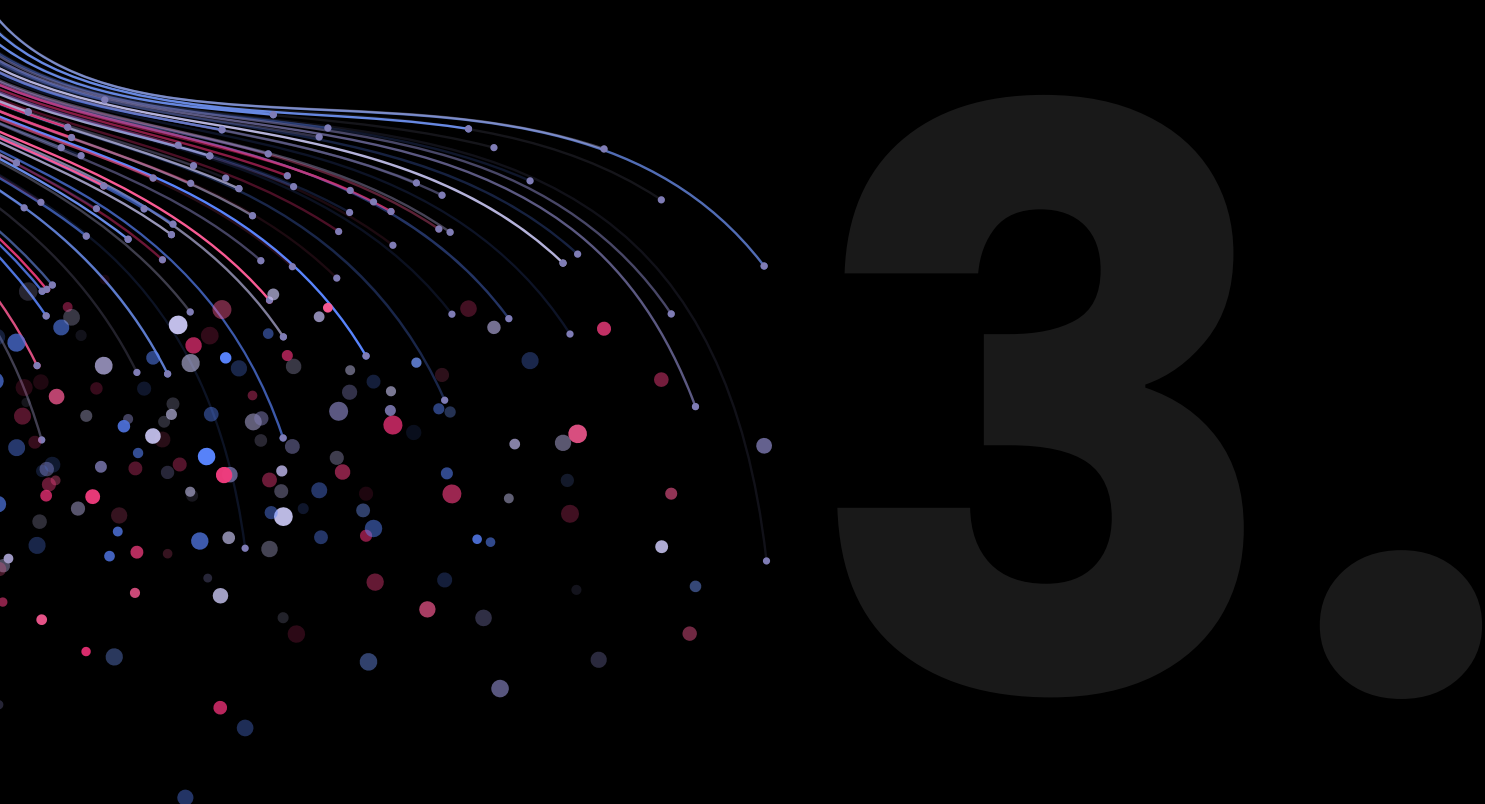
Marketing & Content Creation: Smarter Marketing, Less Effort

Marketing doesn't have to feel overwhelming. With the right AI tools — and a little guidance — you can create consistent, professional content in a fraction of the time.

AI tools can help you create newsletters, blog posts, and social media captions in minutes. Pair them with visual and video generators to quickly produce images and clips — and before you know it, your content calendar is running itself.

But here's where PSM comes in: not everything that's "AI-generated" is compliant. Through the PSM Marketing Hub, contracted agents get access to ready-to-use, compliance-approved templates and materials that make it easy to promote your services without worrying about CMS or carrier restrictions.

We'll help you tailor your messaging, design your visuals, and repurpose your best content across multiple channels so your brand looks consistent and credible everywhere it appears.





4.

Client Retention & Service: Stay Connected, Automatically

AI isn't just about prospecting — it's also a powerful tool for keeping clients engaged year-round.

Imagine your CRM automatically sending a friendly birthday message, reminding clients of upcoming renewals, or checking in when they become eligible for new benefits. These small touches build loyalty and trust, all without taking extra time from your day.

Some systems can even predict which clients are most likely to lapse coverage or which might be ready for a cross-sell conversation. That means fewer surprises — and more proactive service.

At PSM, we show agents how to connect their quoting tools, CRMs, and communication platforms so this kind of automation runs smoothly behind the scenes. You stay personal — but powered by systems that keep you one step ahead.



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Analytics & Optimization: Let Data Guide Your Growth

Once your systems are talking to each other, you can finally see what's working — and what isn't.

AI analytics platforms turn your numbers into insights. They show where leads are converting, which campaigns are driving the most engagement, and how your pipeline is performing over time.

Instead of guessing, you can make confident, data-driven decisions. Maybe you'll notice that email automation drives more follow-ups than manual outreach, or that your social content performs best when paired with short videos.

With AI, optimization becomes part of your routine — not a once-a-year review. And when you need help interpreting the data, PSM is there to mentor you through it, helping you apply those insights to real-world sales strategies.





Partnering With PSM: Guidance That Connects Everything

The real power of AI isn't in the tools — it's in how you use them together. That's where PSM comes in.

We don't sell technology; we help you master it. Our team mentors agents and agencies on how to connect SunFire, CRMs, marketing automation, and content systems into one streamlined workflow that drives consistent sales and retention.

Through our Marketing Hub, you'll have access to:

- Compliance-approved creative materials
- Custom marketing support
- AI-driven campaign ideas
- Training and strategy sessions to build your automation roadmap

When agents combine smart tools with guided strategy, the results are remarkable — more productivity, stronger client relationships, and faster growth.



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Turn Strategy Into Action

At PSM Brokerage, we go beyond concepts and checklists, helping agents integrate real systems that automate, streamline, and scale their operations. Our team combines insurance expertise with the latest technology to make AI practical, compliant, and profitable for your agency.

The right strategy is only half the equation — execution is what drives results. Let's work together to build an AI-ready business model designed for growth, efficiency, and long-term success.

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Quick-Action Checklist

1. Build Your Foundation

Lay the groundwork for smarter systems that support your goals.

- Identify repetitive tasks that could be automated (follow-ups, reminders, outreach)
- Review your current tools – CRM, SunFire, quoting, and marketing platforms
- Choose one area to improve first and define success metrics (time saved, conversion lift)
- Work with PSM to map how your systems can connect and share data

2. Automate Lead Generation & Prospecting

Turn your pipeline into a self-running engine that delivers warm, ready-to-talk leads.

- Use AI tools to score and organize prospects automatically
- Add smart forms or chatbots to capture inquiries 24/7
- Build automated email or text sequences that follow up consistently
- Track engagement and adjust your outreach based on data insights

3. Market Smarter with AI & the PSM Marketing Hub

Create professional, compliant content faster than ever.

- Use AI writing tools to draft blogs, newsletters, and social media posts
- Design visuals or short videos with AI image and video tools
- Repurpose your best content across multiple channels
- Access PSM's Marketing Hub for compliance-approved templates and creative support

4. Enhance Client Retention & Service

Keep relationships strong with automation that feels personal.

- Automate birthday, renewal, and coverage review reminders
- Use segmentation to send personalized, timely messages
- Identify cross-sell or retention opportunities through CRM data and AI insights
- Sync SunFire and CRM tools to log interactions automatically

5. Measure, Optimize & Grow

Use data and mentorship to scale what works.

- Review dashboards monthly to track conversions and engagement
- Let AI analytics tools highlight patterns, trends, and opportunities
- Simplify or automate what slows you down
- Schedule a strategy session with PSM to refine your automation roadmap and keep learning

