




Using AI to Prep for Insurance Appointments - Fast

The Prep Time Shift



The Old Way:
30 Minutes

A technical drawing of a mechanical part, possibly a bracket or a plate, with various dimensions and lines indicating its structure. The drawing is rendered in a light blue color on a dark blue background.



The AI Way:
5 Minutes

A complex circuit board diagram with various components, including resistors, capacitors, and integrated circuits. The diagram is rendered in a light blue color on a dark blue background.



Hesitation Kills Sales.

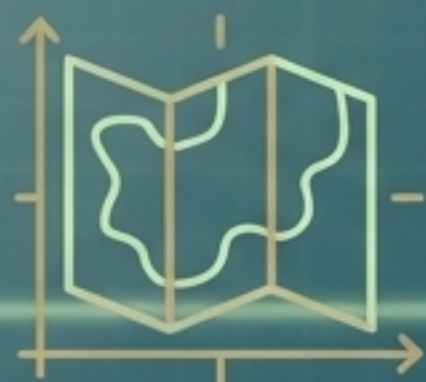
- Unexpected network questions
- Unfamiliar hospital systems
- Loss of expert positioning



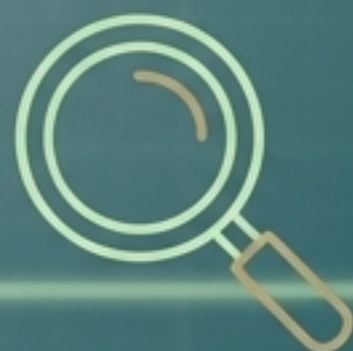
15 Minutes to Total Confidence

AI-assisted prep eliminates surprises so you walk in sounding like an expert.

The 3-Prompt System



Area
Research



Common
Concerns



Talking
Points

Prompt 1: Area Research

Give me a summary of the Medicare market in [zip code]. HMO vs PPO? Major hospital systems?

The Goal: Market Snapshot

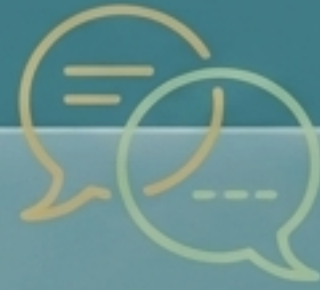
Prompt 2: Common Concerns

What local factors affect Medicare coverage in this area? (e.g., rural access, provider availability)

The Goal: Anticipate Needs



Prompt 3: Talking Points



Based on this area, give me 3 natural, conversational talking points to start a meeting.

The Goal: Relevant Openers



Important Rule

AI is a prep tool, not a quoting tool.

- Never use AI to recommend plans
- Never provide AI coverage details to clients
- Rely on licensed tools for actual quotes

In Practice



9:30 AM - Run 3 AI Prompts



9:35 AM - Review local hospital & rural data



10:00 AM - Walk in informed



Building Context, Not Memorizing

When they mention their rural clinic, you already know why that impacts their plan choice.

Your Action Step

- ✓ Run all 3 prompts for your next client's zip code
- ✓ Pick one market detail
- ✓ Bring it into the conversation naturally