

Using AI to Write Insurance Outreach That Sounds Like You

The Blank Screen Problem



Most agents waste 20 minutes staring at a draft

The Result: Stiff, generic outreach



The Solution: Generate custom drafts in **seconds**

The Vending Machine Mistake

Generic
prompt in



Corporate
buzzwords out

The Input Determines The Output



Generic Context

Buzzwords and
robotic tone



Specific Context

Real message from
a real person

The 3-Part Prompt Architecture

1

Who you are

2

Who you are writing to

3

What you want to happen

Part 1: Who You Are

Define your tone, not just your title



Independent
agent

Friendly and
direct

No jargon

Neighbor,
not a
salesperson

67-year-old woman

Met at community event

Confused about
Medicare options

Part 2: Who You Are Writing To

Provide context, not
just demographics





Part 3: What You Want

Set the objective and the boundaries

Short follow-up email

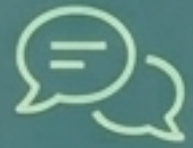
Remind her we talked

Offer to answer questions

Not a sales pitch ⚠️

The Blueprint in Action

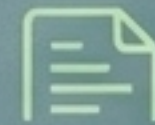
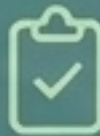
Tone: Friendly, simple,
no jargon



Context: Linda, senior
center, doctor left network

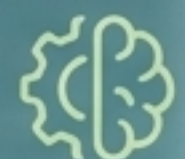


Goal: Short text follow-up,
neighborly approach



Result: A ready-to-send
draft in **30 seconds**

The 80 20 Rule

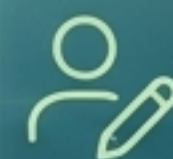


80% AI

Generates the starting
draft and structure

20% You

Adjusts the tone to make it
authentically yours





The Golden Rule

Always read before you send

Rewrite or delete
robotic language

Ensure it sounds like
it came from you

Your Action Step



Open any AI tool right now



Write one prompt using the **3-part formula**



Generate, adjust, and send one message