



# AI-Powered Follow-Up for Insurance Agents

# The Follow-Up Fatigue

Writing 50 personalized messages fries your brain. The touches that matter most never go out.



150

Yearly touches = retained clients & more referrals

10

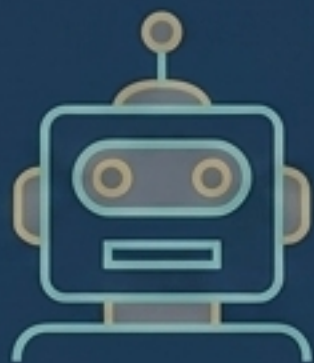
Yearly touches = lost renewals

# Volume without help is a part-time job.

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## The fears holding agents back:

1.

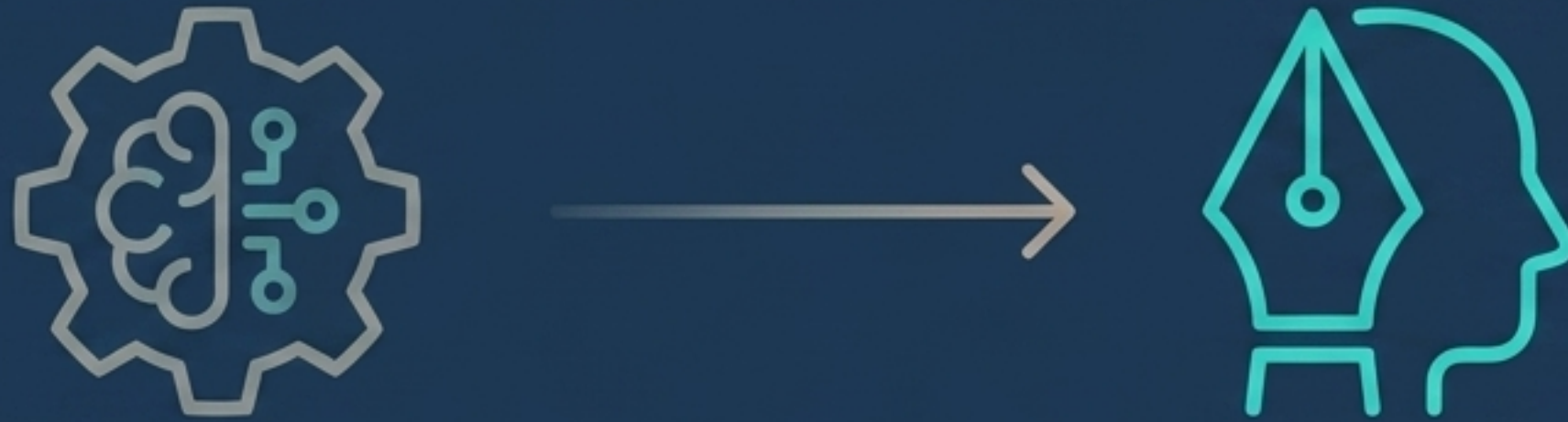


AI will sound  
robotic.

2.



Everyone else is  
already ahead.



**AI is a junior assistant.**

AI writes the **rough draft** → You write the **final version**

**You stay in charge.**

30-60s

# The Edit Phase

Swap generic phrases for your voice

Add specific client details

Cut formal or sales-y lines



AI does not know *your* rules.

Always read every draft for compliance.

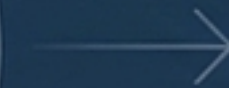
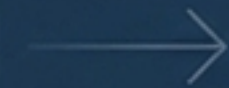
No unverified benefits. No forbidden comparisons.

Your name. Your judgment.

# Vague prompts equal generic output.

The problem isn't the AI.  
It's the prompt.

Write a birthday  
message for a  
Medicare client.



# Save these three templates to your CRM:

**1.**

## **Birthday Message**

Warm, no sales pitch,  
real human connection.

**2.**

## **AEP Check-In**

Short, direct, offers  
15-minute review times.

**3.**

## **Renewal Reminder**

Policy anniversary, life  
update check-in.

Example

## The Raw Draft: Mrs. Alvarez

Happy birthday Maria, hope you have a wonderful day surrounded by family. I wondered if the grandkids made it out...

# The 45-Second Edit

Happy birthday **Mrs. Alvarez**... Did your grandson have a good **baseball season**?

- Swapped Maria for Mrs. Alvarez
- Added: Did your grandson have a good baseball season?
- Result: Same speed, real personality.



lockup

## Verify Before You Send

AI is a drafting tool.  
You are the editor and the publisher.

## Action Step

1. Open your AI assistant.
2. Pull one client with an upcoming birthday.
3. Run a prompt, edit for 60 seconds, and send it today.