

# Using **AI** to Build an Insurance Presentation **Fast**



# Directing the Tool

You are not learning to design slides.

You are learning to direct a builder.

The skill lies in the prompt, the structure, and the edit pass.

# Speed of Preparation is Income Leverage

Faster  
presentation  
prep



More time  
in front of  
clients



More  
applications  
written

# Technology Without Losing Control

AI will not force generic or off-brand outputs.

You retain full control over every word on every slide.

# Three Categories of AI Assistance



## Text-to-Slide

Generates full drafts rapidly (Gamma, Canva Magic Design).

Best for immediate first drafts.

## Conversational AI

Produces structure and copy (ChatGPT, Claude, Gemini).

Highest leverage workflow for complete control.

## Built-In AI

Modifies existing decks (PowerPoint Designer).

Best if already working within that specific tool.

# The Anatomy of a Strong Prompt



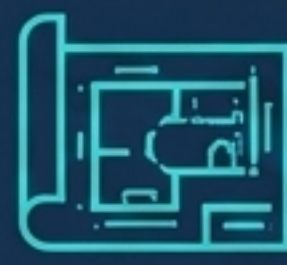
## Role

Who the AI is acting as



## Audience

Age range, current products, concerns



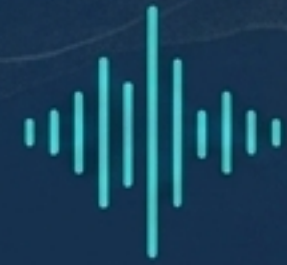
## Topic

Specific concept, not general category



## Structure

Exact slide flow and count



## Tone

Conversational, plain English, no jargon

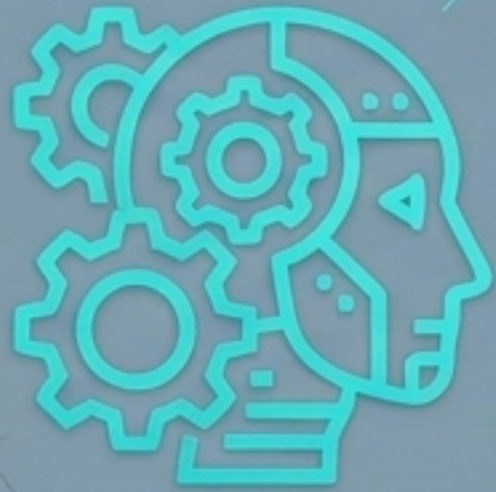
# The 90% Ready Starting Draft

You are a licensed insurance agent presenting a thirty minute educational session to a group of fifteen people, ages sixty-two to sixty-eight, who are within two years of Medicare eligibility.

Build a twenty slide outline that explains the difference between a Medicare Advantage plan and a Medicare Supplement plan. Plan for roughly one slide every ninety seconds. Use plain language. Avoid industry jargon. Each should have a clear headline, three short bullets, and one talking point I can read out loud. End with an action step that invites the audience to schedule a one on one review

# The Read-Out-Loud Rule

The AI draft is only your first draft.

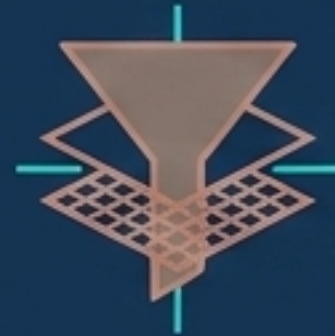


Read every slide aloud.



If it does not sound like a conversation across a kitchen table, rewrite it.

# Filtering for Compliance



Remove guarantees about specific premiums or benefits. (Use 'plans generally offer')



Remove comparative claims.  
(Use neutral framing; let the client decide)



Remove specific carrier names.  
(Verify current CMS marketing guidelines first)

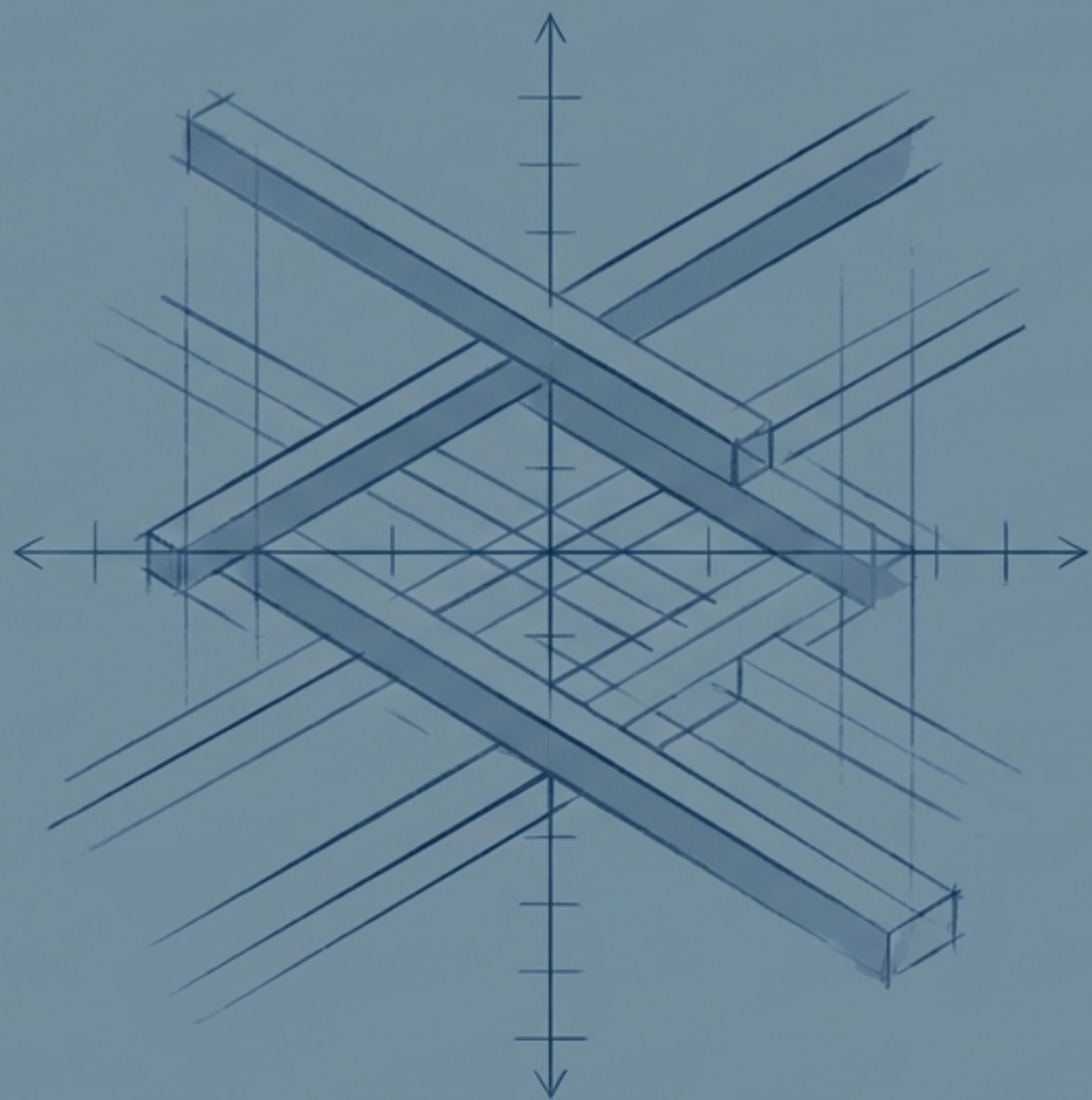
# Replace Generic Scenarios

## Generic

Generic AI examples lack weight and fail to build connection.

## Real Stories

Insert real stories from your own book of business. Highlight real out-of-pocket savings from a Medicare Supplement switch, or the peace of mind from a Final Expense policy locked in at 68.

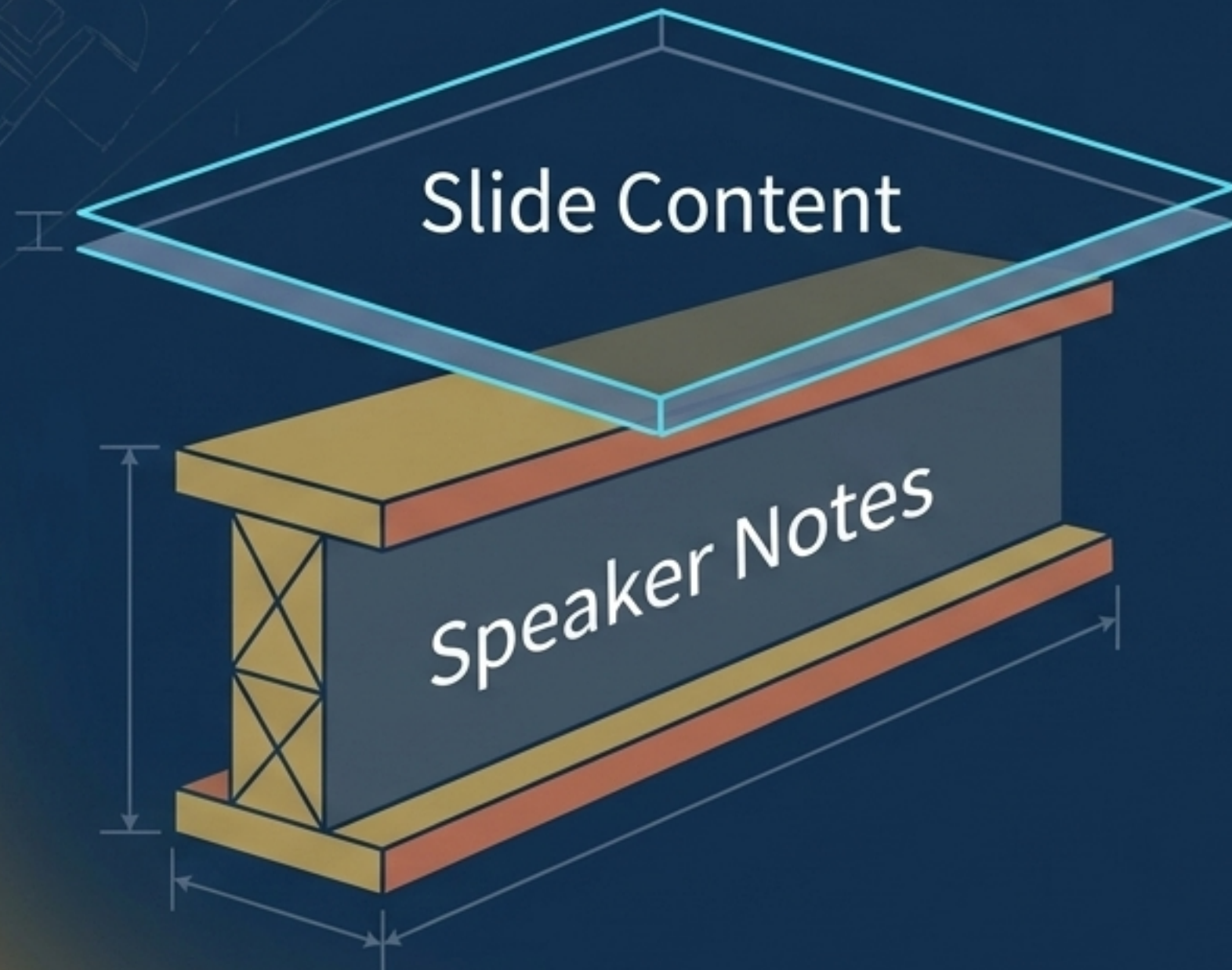


## Build Once, Reuse Forever

Lock in one template, one font set,  
and one accent color.

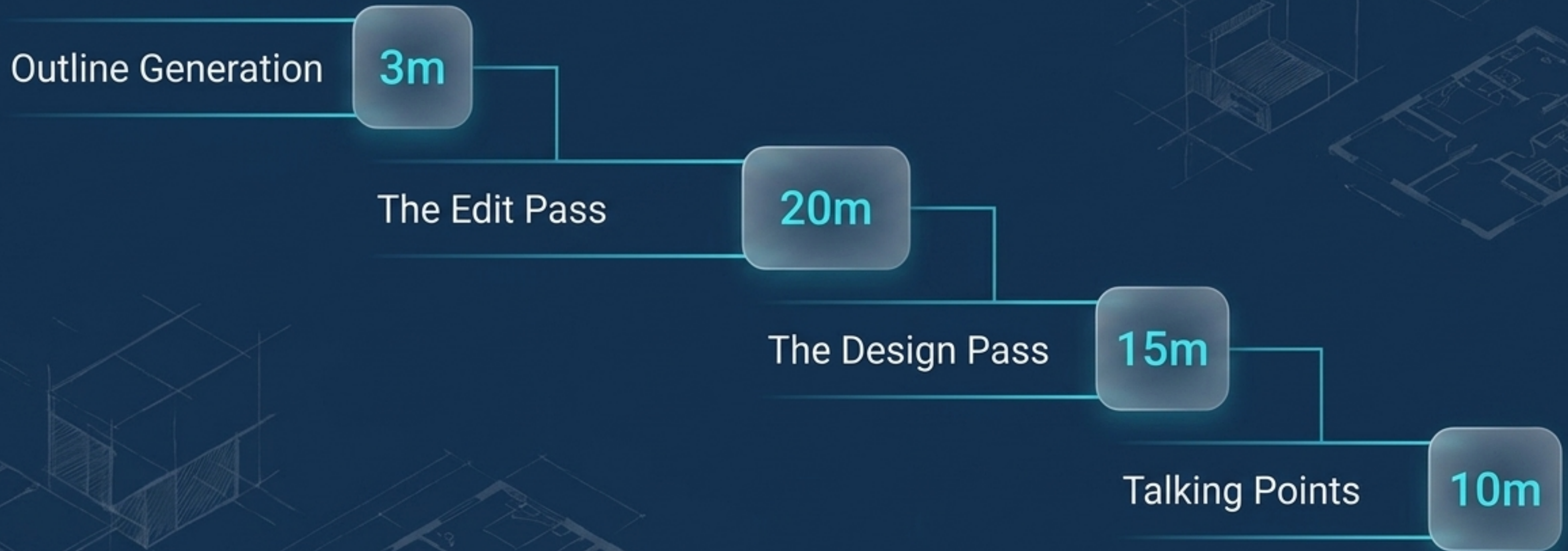
Never start from scratch again.

# Slides Support, You Present



- Slides are visual support.
- Your speaker notes are the **actual presentation**.
- Write **2-3 cue sentences** per slide—not a script to read.

# From Desk to Done in Under an Hour



# Two Points of Failure



## **Delegating the close.**

You must write the final action step and invitation yourself. That is your business, not the AI's.



## **Skipping the rehearsal.**

Reading aloud catches the credibility cracks before the client ever hears them.

# Build Your System Today



**Identify one presentation needed in the next two weeks.**

**Write down the five-part prompt right now.**

**Run the workflow tomorrow morning.**