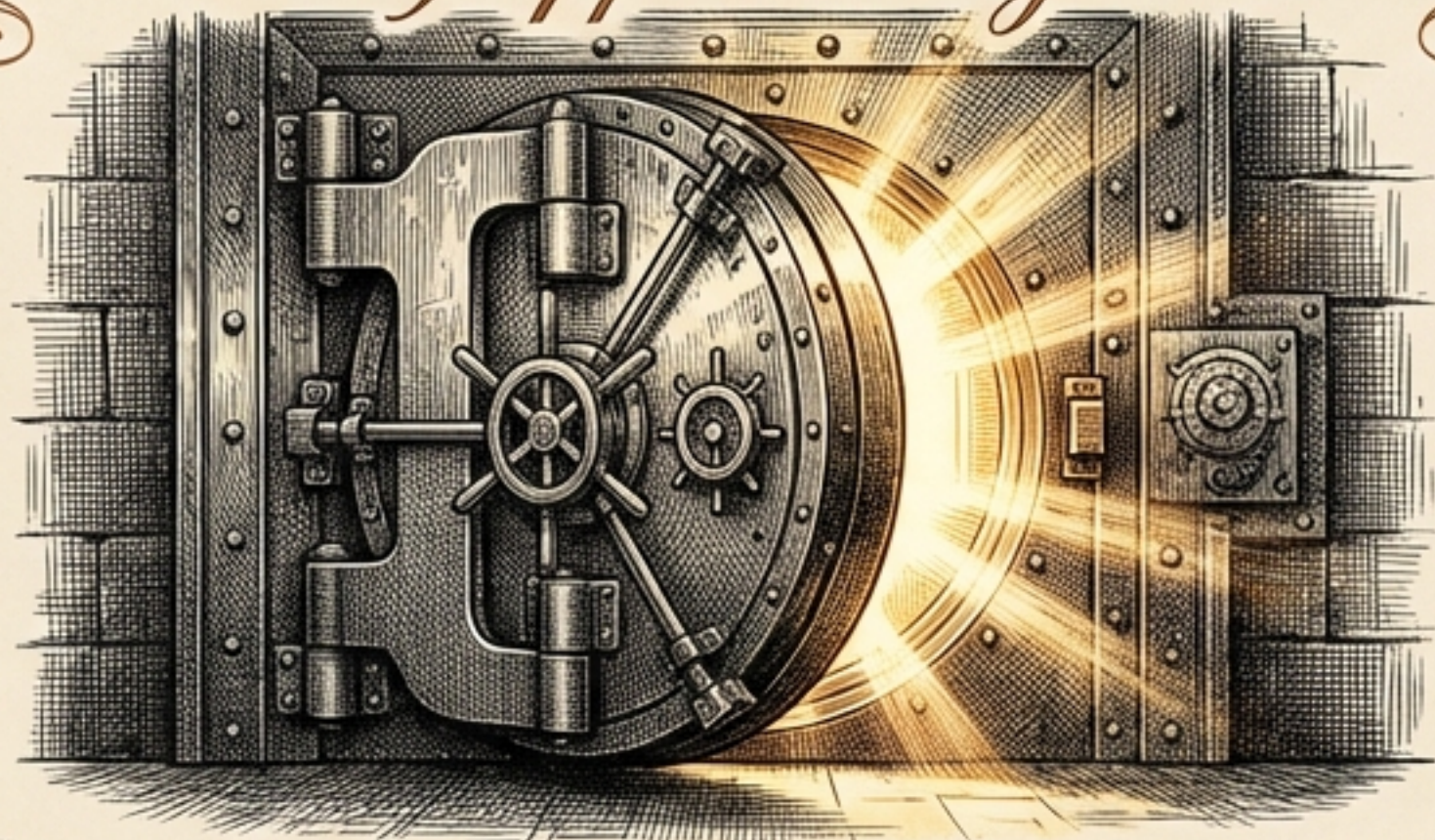


THE 8% EDGE

The window of opportunity is wide open.



Only 8% of agencies have embedded AI into daily workflows.

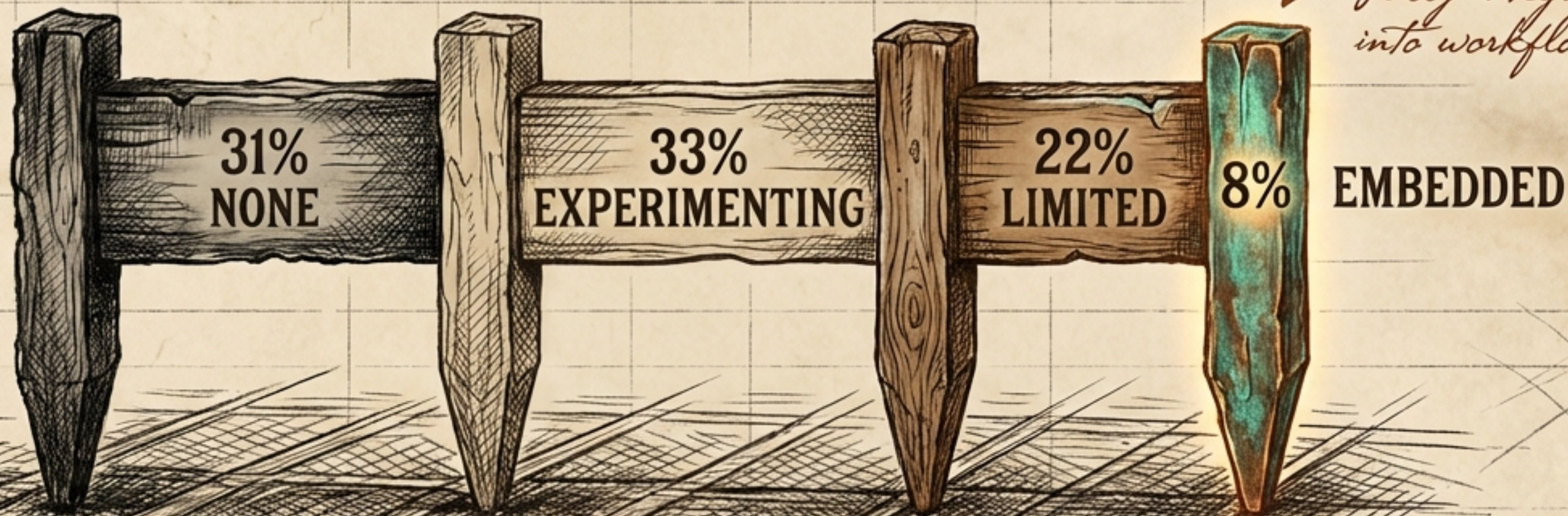
31% aren't using it at all.

You are not behind. You are exactly on time.

THE INSURANCE PRODUCERS GUILD | EPISODE 4

Produced by PSM Brokerage

WHERE AGENCIES STAND ON AI



Source: 2026 Big I ACT
Tech Trends Report.

WHAT TOP AGENTS ARE USING AI FOR RIGHT NOW



Email Drafting



Call Summaries



Marketing Content



Document Review



Policy Review

Start where the labor is repetitive and manual.

THE RETENTION MATH

Retention is Key

ACQUISITION

Costs 5x to 9x more than retaining a client.



RETENTION

Personalized services boost retention to 81%.

Efficiency = Growth

Every hour saved on admin = An hour earned for retention calls.

THE RETENTION CALL SCRIPT

15-minute call.

Hey [name],
I saw your plan premiums went
up. I already pulled three
alternatives.
Can we spend 15 minutes this
week to review?

*Requires \$0 in
acquisition cost.*

*Protects \$300-\$500 in
annual commission per call.*

DON'T BUY SHINY — ACTIVATE WHAT YOU HAVE

THE DUBIOUS PROMISE

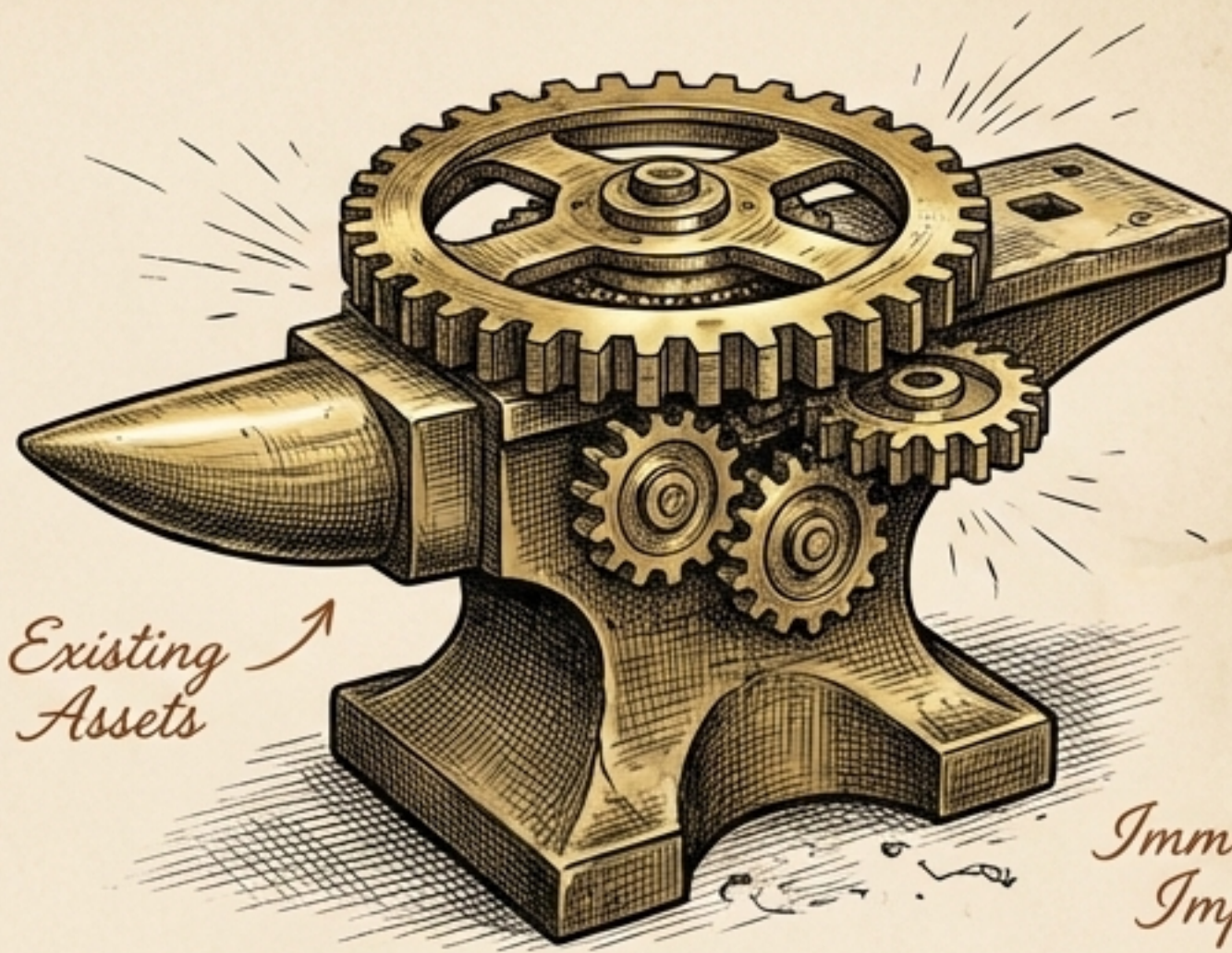


Questionable Value

Two-thirds of brokers say vendors overstate ROI. Don't buy new problems.

Costly Mistake

THE PRACTICAL PATH



Existing Assets

Immediate Impact

The Best Move: Turn on AI features dormant in your existing tools. Activate what you already pay for.

Use PSM's Marketing Hub for ready-made, co-branded materials without the heavy lifting.

YOUR GO-DO THIS WEEK

Daily Planner

Foreman's Checklist

- [1] Pick ONE repetitive task (email drafting, call summaries, or client review scheduling).
- [2] Use AI for it every day this week.
- [3] Measure the time saved on Friday.
- [4] Scale from there.

P.S.M.'s business coaching can help you build the plan.

SECURE YOUR COMPETITIVE EDGE

If you're not already with PSM,
this is the kind of daily intelligence our agents get.
Talk to us about contracting.

PSM Brokerage — Precision Senior Marketing
A National FMO serving the discerning independent agent.
Licensed and operational in all 50 states.

[INITIATE CONTRACTING TODAY]