

IAD HUMAN-FIRST AI KIT



Templates + prompts to follow up faster
without losing the human touch.



SIMPLIFYING YOUR SALES SUCCESS

Leverage IAD's 7 Pillars of Success
to Grow & Scale Your Business

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IAD HUMAN-FIRST AI KIT

Templates + prompts to follow up faster without losing the human touch.

WHAT THIS PROTECTS	Your tone, your trust, and your time.
WHAT THIS REMOVES	Blank-page writing, rework, and scattered follow-up.
WHAT THIS GIVES	A checklist, prompt pack, and a weekly cadence you can repeat.

■ The Human Touch Test:

If a client read this, would they feel cared for — or processed? If it feels processed, add one real sentence from your notes.

■ Safety note:

Never paste private client data into any AI tool (names, SSNs, policy numbers, health info). Use placeholders like [Client] and [Next Step]. Always review for accuracy and compliance before you send.

This kit is designed to feel calm, practical, and repeatable — not hypey. AI is the draft writer. You are the trusted advisor.



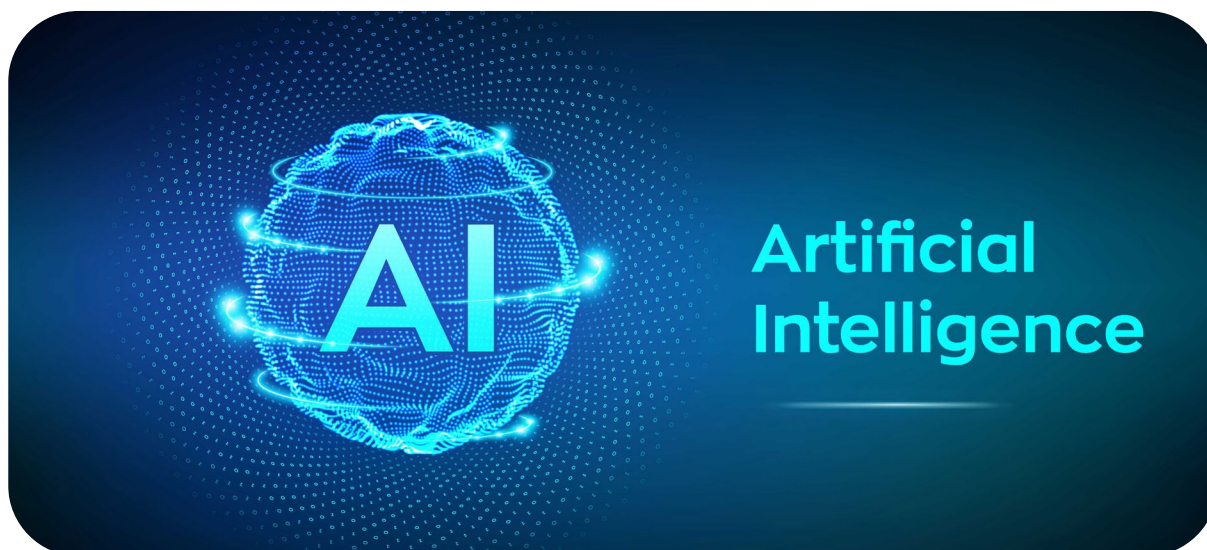
QUICK START (10 MINUTES)

- Save the **Brand Voice** prompt (page 4) as a reusable template.
- Save the **Risk Scan** prompt (page 4) and run it before sending anything AI-assisted.
- Build your first **10 templates**: 3 emails + 5 texts + 2 objection replies.
- Pick one weekly habit: every Monday, refresh templates and rotate one new angle.

The IAD rule: **AI does drafts. You do trust.**

The 3-layer Human-First system

- **System**: consistent follow-up templates (so clients don't slip).
- **Sentence**: one line that proves you listened (so clients feel cared for).
- **Step**: one clear next action (so clients know what to do).



THE PROOF-OF-LISTENING LINE BANK (PICK ONE)

- “Thanks again for making time today — I know you’ve got a lot going on.”
- “You asked a smart question. Most people don’t, and it matters.”
- “Totally normal to feel unsure here. We’ll keep it simple.”
- “I heard you: you want [goal]. Let’s make the next step easy.”
- “You’re doing the right thing by checking this now instead of later.”
- “No rush — just clarity. Here’s the cleanest next step.”
- “If this feels overwhelming, that’s normal. We’ll go one step at a time.”
- “I’m going to keep this short so it’s easy to reply.”
- “You don’t have to decide today — you just need the right comparison.”
- “My job is to make this feel clear, not complicated.”



THE HUMAN-FIRST AI CHECKLIST

Print this page. Check items as you set them up.

SETUP (DO ONCE)

- Create and save your Brand Voice prompt.
- Create and save your Risk Scan prompt.
- Create a placeholder library: [Client], [Spouse], [City], [Carrier], [Plan], [Next Step], [Day/Time].
- Build 3 core emails: first follow-up, missed call, appointment confirm.
- Build 5 core texts: missed call, reschedule, document request, reminder, thank-you.
- Create 2 objection replies you can reuse: “think about it” + “shop around.”

DAILY (5–10 MINUTES)

- Draft follow-ups from your notes using placeholders only.
- Add one Proof-of-Listening line.
- Shorten the message (aim for: emails < 150 words; texts < 240 characters).
- Run Risk Scan before sending.

WEEKLY (30 MINUTES)

- Refresh 10 templates based on what you sold and what objections you heard.
- Rotate one new angle: loss / effort / status / safety / speed.
- Write one short FAQ post using real client questions from this week.

BEFORE YOU HIT SEND (ALWAYS)

- Confirm no private data is in the prompt or message history.
- Replace placeholders carefully (names, dates, times, product details).
- Remove anything that sounds like a guarantee or pressure.
- Include one clear next step (reply / pick a time / confirm / send docs).

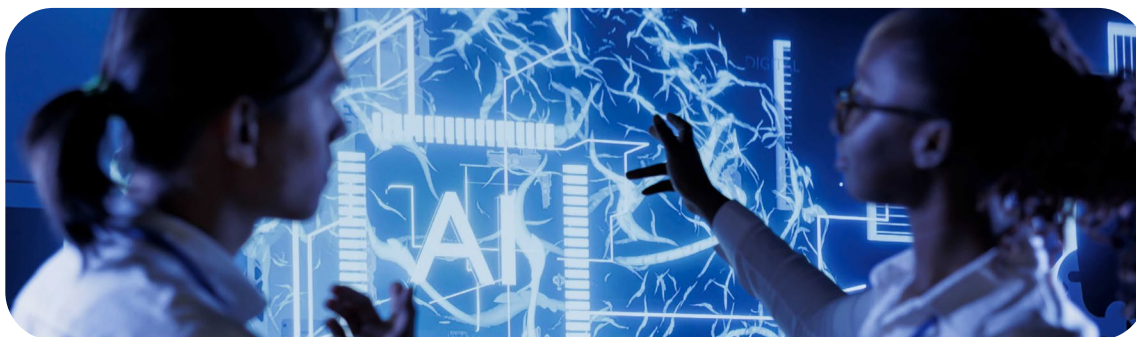
PROMPTS THAT KEEP YOU HUMAN

THE PROMPT STACK (60 SECONDS)

- **Role:** You are a licensed insurance agent writing client communication.
- **Goal:** Write a [text/email] that moves one step forward: [confirm/reschedule/book/send docs].
- **Context:** Situation + placeholders only. No private data.
- **Rules:** Calm, clear, short sentences. No guarantees. No pressure. Length limit.
- **Output:** Two versions: standard + shorter. End with one simple question.

COPY/PASTE: IAD BRAND VOICE PROMPT

- You are writing as an independent insurance agent.
- **Tone:** calm, professional, direct. Short sentences.
- **Reading level:** simple and clear.
- **Avoid:** hype, pressure, fear language, guarantees, jargon.
- **Goal:** make the client feel understood and guided.
- **Length:** emails under 150 words. Texts under 240 characters.
- **Output:** give 2 versions (standard + shorter). End with one simple question when possible.



THE HUMAN-FIRST AI CHECKLIST

COPY/PASTE: RISK SCAN PROMPT

- Review the message below for risk.
- **Flag any:** guarantees, misleading claims, medical advice, pressure language, or compliance concerns.
- Suggest safer replacements without adding new claims.
- Keep it short.
- Message: [PASTE DRAFT]

COPY/PASTE: NOTES[®] MESSAGE PROMPT (CLIENT-SAFE)

- Turn these notes into a client message.
- Do not invent facts. Use placeholders only.
- Add one proof-of-listening line.
- Keep it under 140 words.
- **Notes:** [PASTE YOUR BULLETS]

PROMPT PACK (30 COPY/PASTE PROMPTS)

Replace brackets. Use placeholders only.

FOLLOW-UP (SPEED + CONSISTENCY)

1. Write a 120-word follow-up email after a first call. Include 2 subject lines. End with one question. Context: [topic] [next step] [timeframe].
2. Write 2 missed-call texts. Version A: warm. Version B: direct. End with one question. Under 220 characters.
3. Write an appointment confirmation text for [Day/Time]. Ask them to reply YES to confirm. Under 240 characters.
4. Write a reschedule message (email + text). Offer two time windows. Ask them to pick one.
5. Write a document request text for [documents]. Give a one-line reason and one next step.
6. Write a reminder text 24 hours before an appointment. Keep it calm. Ask for a YES to confirm.
7. Write a thank-you text after the call and summarize the next step in one sentence.

OBJECTIONS (CALM, NOT PUSHY)

8. Write 3 replies to: "I need to think about it." Soft, standard, firm. No pressure. End with one question.
9. Write a reply to: "I want to shop around." Respect the choice and suggest one clean comparison step. Under 120 words.
10. Write a reply to: "It's too expensive." Validate, then offer two options (adjust [deductible/benefit/coverage] or keep as-is). End with one question.



SIMPLIFYING YOUR SUCCESS
Personalized Support • Unmatched Resources

Human-First AI Kit – IAD Product Line Guidebook

PROMPT PACK (30 COPY/PASTE PROMPTS)

Replace brackets. Use placeholders only.

REFERRALS + REVIEWS (TRUST BUILDERS)

11. Write a reply to: "I'm not sure I need this." Ask one clarifying question and offer a simple example (no scare tactics).
12. Write a referral ask line for a phone call that feels natural and low-pressure.
13. Write a follow-up referral text that makes it easy to forward. Include a short intro line they can copy.
14. Write a review request email (under 120 words) + a review request text (under 220 characters).

PLAIN-ENGLISH EXPLANATIONS (CLARITY)

15. Explain [topic] in plain English. Short sentences. No jargon. 6th-grade reading level. 5 bullets max.
16. Rewrite this paragraph to be clearer and shorter without changing meaning: [PASTE].
17. Create 10 FAQs a client might ask about [topic]. Provide short answers (2-3 sentences).



PROMPT PACK (30 COPY/PASTE PROMPTS)

Replace brackets. Use placeholders only.

MARKETING CONTENT (WITHOUT SOUNDING GENERIC)

18. Create a blog outline for keyword: [keyword]. Include H2s and bullets.
Target: busy consumers

19. Write 5 Facebook posts for [City/County] about [topic]. Ask a question at the end of each. Under 60 words.

20. Turn this client question into a short post with a calm tone: [PASTE QUESTION].

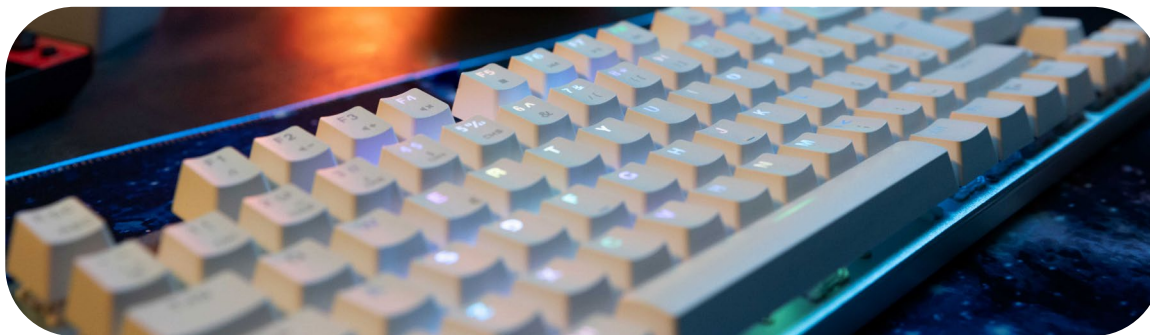
21. Write 10 subject lines for an email about [topic]. Keep them short. Avoid spam words.

SYSTEMS (REDUCE FRICTION)

22. Turn these messy notes into a clean summary + next steps. Do not invent facts. Notes: [PASTE].

23. Create a reusable template set for [product line]: missed call, reschedule, doc request, appointment confirm, follow-up, annual review, referral ask, review request, reactivation, thank-you.

24. Create a one-sentence next step for this scenario: [scenario]. Give 5 options.



TEMPLATE LIBRARY (STARTER SET)

These are intentionally simple. Personalize with one Proof-of-Listening line.

Email template: First follow-up

Subject: Quick next step

Hi [Client] —

Thanks again for your time today. [PROOF-OF-LISTENING LINE]

Based on what you shared, the clean next step is [Next Step].

Would you prefer [Option A] or [Option B]?

— [Your Name]

Email template: Reactivation (went quiet)

Subject: Still want me to help?

Hi [Client] —

Just checking in. [PROOF-OF-LISTENING LINE]

Do you still want to take a look at [Topic], or should I close this out for now?

— [Your Name]

TEMPLATE LIBRARY (STARTER SET)

These are intentionally simple. Personalize with one Proof-of-Listening line.

TEXT TEMPLATES (COPY/PASTE)

- **Missed call:** Hi [Client] — it's [Your Name]. I just tried you. Want me to call back now, or is later better?
- **Reschedule:** Hi [Client] — can we move our time? I can do [Window 1] or [Window 2]. Which works?
- **Doc request:** Hi [Client] — quick ask: can you send [documents]? It helps me confirm [purpose].
- **Reminder:** Hi [Client] — reminder for [Day/Time]. Reply YES to confirm, or tell me a better time.
- **Thank-you:** Thanks again, [Client]. Next step: [Next Step]. Want me to send that over now?



TEMPLATE LIBRARY (STARTER SET)

These are intentionally simple. Personalize with one Proof-of-Listening line.

7-DAY ROLLOUT PLAN (SO IT STICKS)

- ▶ Day 1: Save Brand Voice + Risk Scan prompts as templates.
- ▶ Day 2: Build 3 follow-up emails you reuse weekly.
- ▶ Day 3: Build 5 texts (missed call, reschedule, doc request, reminder, thank-you).
- ▶ Day 4: Build 3 calm objection replies.
- ▶ Day 5: Build referral ask + review request.
- ▶ Day 6: Draft one blog outline from real client questions.
- ▶ Day 7: Choose your weekly habit: Monday template reset + angle rotation.

MINI AI USE POLICY (COPY/PASTE)



We use AI tools to draft marketing and client communications.



We do not input personal client data or protected information.



All AI outputs are reviewed by a licensed agent for accuracy and compliance before use.



AI does not provide financial, legal, or medical advice.



When in doubt, we do not use AI for that task.

START YOUR JOURNEY WITH IAD AND UNLOCK YOUR BUSINESS POTENTIAL!

YOUR SUCCESS IS OUR MISSION...

When you choose Insurance Advisors Direct, you're not just selecting an FMO; you're gaining a dedicated business ally. Our 7 Pillars of Success are designed to help you grow, scale, and thrive.

We're grateful for your interest in partnering with us. Our agents and partners are the heart of our success, and your dedication makes IAD stand out. Thank you for being part of our journey!

READY TO ELEVATE YOUR BUSINESS?

Join the IAD team and unlock exclusive perks and incentives, including:



**CARRIER INCENTIVES
AND BONUS PROGRAMS**





**TOP PRODUCER RECOGNITION
AND REWARD TRIPS**



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