

10 AI PRO TIPS EVERY MARKETER SHOULD KNOW

STRONG AI USE-CASES EXIST ACROSS THE CUSTOMER JOURNEY

LIFE/ANNUITY
CUSTOMER JOURNEY



Pre-Sale
Preparation



Prospecting



Sales Closing and
Application



Post-issue
Client Mgmt

#1 Build Your AI Prompt Library & Checklists



- Identify 5–10 **repeatable workflows** (review notes, draft follow-ups, prep seminars)
- Turn each into a **re-usable prompt template** (you can copy-paste into Copilot/Claude)
- Store in OneNote/SharePoint so your team can standardize and improve together

#2 Start with Context, Not Commands



- Always open with a **context block**: who you are, who the client is, and your goal
- Example: "You are a financial professional focused on LTC for pre-retirees with \$2-5"
- Adding client persona + communication goal changes the quality/tone of outputs

#3 Expand Language Translation Budget with AI



- Language is a real barrier for some Americans getting access to financial services
- Use AI to turn English pieces into other languages at **20% of cost and 10% of time**

#4 Repurpose One Good Piece of Content 10 Ways



- Take an approved piece and have AI spin: email invite, social posts, seminar script, FAQs
- Ask for **channel-specific** tone: LinkedIn post vs. client letter vs. slide bullets
- Build mini **campaign kits**: "Create a 4-email journey and 3 social posts from this article"

#5 Segment Your Prospects



- AI can **divide a broad market into smaller**, more defined groups of customers with similar needs, characteristics, or behaviors
- Sample prompt -> "Cluster FPs into 6 segments using CHANNEL, REGION, REVENUE, DIGITAL_ENGAGEMENT, PROD, and WHOLESALER_TOUCHPOINT"

#6 Optimize Content for Generative Engines



- Optimize marketing content for GEO by **making it easy for AI systems** to find, understand, trust, extract, & cite.
- Start with natural-language questions, give direct answers, add decision depth, strengthen trust signals, structure content for extraction, & keep pages technically crawlable

#7 Role-Play Tough Conversations & Objections



- Use AI to **simulate a skeptical client** with specific persona details (age, assets, concerns)
- Practice responses to: fee questions, volatility, misconceptions, protection gaps
- Ask AI to **score and coach** your reply: "Critique this response and make it clearer and more empathetic"

#8 Build Simple AI for Lead Nurturing



- In an Agent Builder, the assistant-like natural language experience makes creation easier by letting **builders describe what they want in plain language**
- Let Agent Builder generate steps and refine or reorder them through conversations.

#9 Find Actionable Insights from VOC Using AI



- Oftentimes, VOC is unstructured and underutilized. Insights are delayed and fragmented.
- Build a unified AI platform that synthesizes every customer signal in near real-time, **enabling faster decisions and proactive service**

#10 Cross-check AI Outputs with Other AIs



- Cross-checking AI responses reduces hallucinations & reasoning errors.
- To verify effectively, input identical prompts into multiple AI tools (e.g., ChatGPT, Claude, or Copilot) side-by-side. If models diverge, at least one is likely fabricating.
- Treat AI answers like a **first draft, not final truth**.

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