UNLOCKED CRM

FREE GUIDE FOR INSURANCE AGENTS

Run your insurance business just by asking

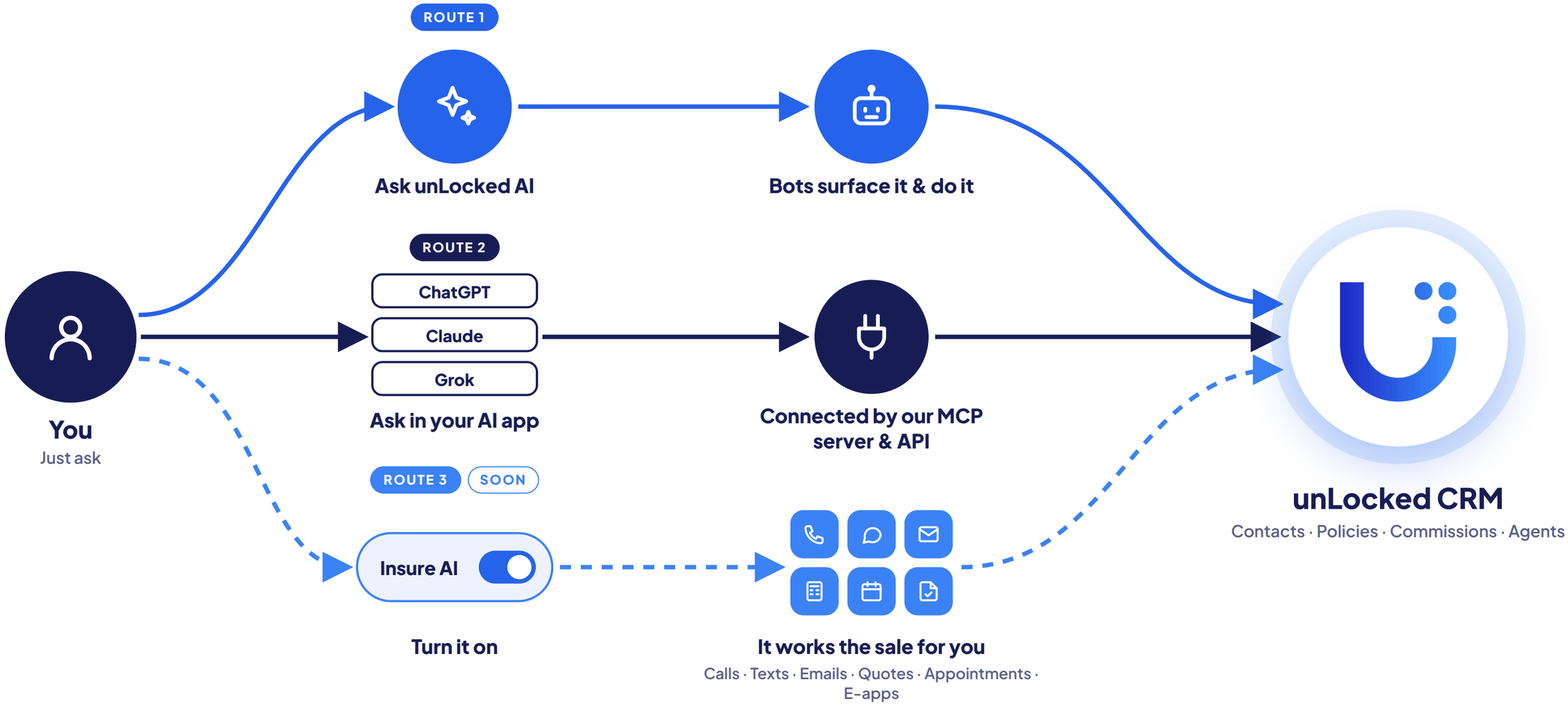
Three ways agents get CRM work done with AI: inside unLocked, from ChatGPT, Claude or Grok, or with an AI agent that works the sale.

INSIDE THIS GUIDE

1. The three routes, mapped
2. Things to ask on each route
3. Which route fits how you work

HOW INSURANCE RUNS ON UNLOCKED

Three ways to run your CRM



TRY IT

Things to ask, by route

ROUTE 1

unLocked AI & Bots

- “Who hasn't heard from me in 30 days? Text them a check-in.”
- “Show me renewals coming up next month.”
- “Build a follow-up workflow for new Medicare leads.”

ROUTE 2

ChatGPT, Claude or Grok

- “Which September policies haven't paid commission yet?”
- “Summarize my pipeline by stage.”
- “Add a note to Jane's record from this call.”

ROUTE 3 COMING SOON

Insure AI

- “Call my new leads and book appointments.”
- “Quote Jane and send her the options.”
- “Submit the e-app once she signs.”

PICK ROUTE 1 IF

You work in the CRM all day

PICK ROUTE 2 IF

You already live in an AI app

PICK ROUTE 3 IF

You want the sale worked for you

UNLOCKED CRM

NEXT STEP

Watch it work on your own book

Book a free demo at www.unlockedcrm.ai

ON YOUR DEMO, WE'LL

- Ask unLocked AI to do real work in your account
- Connect ChatGPT, Claude or Grok to your CRM
- Show you where Insure AI fits your sales process