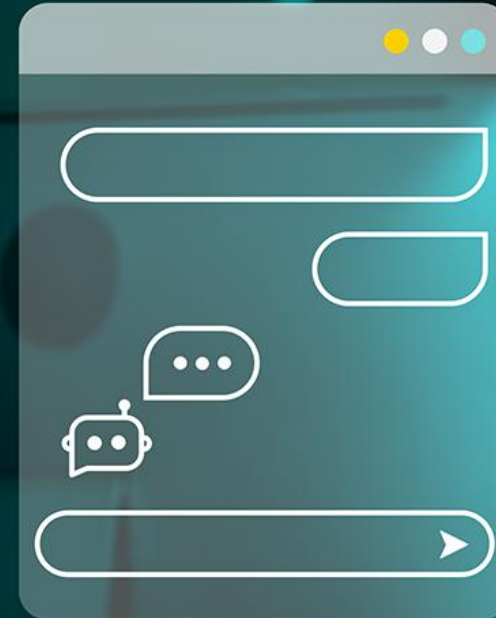


Hands-on Prompting Workshop

# IIAV Convention: Improve How You Work With AI



**Liberty Mutual**<sup>®</sup>  
INSURANCE

# Don't have AI? These are free

- [chatgpt.com](https://chatgpt.com)
- [copilot.microsoft.com](https://copilot.microsoft.com)
- [claude.ai](https://claude.ai)
- [gemini.google.com](https://gemini.google.com)

**CAUTION:**  
If it's free, do not input PII or other private data

## **AI Disclaimer:**

This document may contain content generated by Artificial Intelligence. The author has reviewed AI-generated content for accuracy and revised it where necessary.

## **Vendor Disclaimer:**

Being listed here should not be considered an endorsement by Liberty Mutual or Safeco Insurance. All trademarks are the property of their respective owners. Use of any mark herein does not imply any affiliation with or endorsement by any trademark owner.



# Dale Steinke

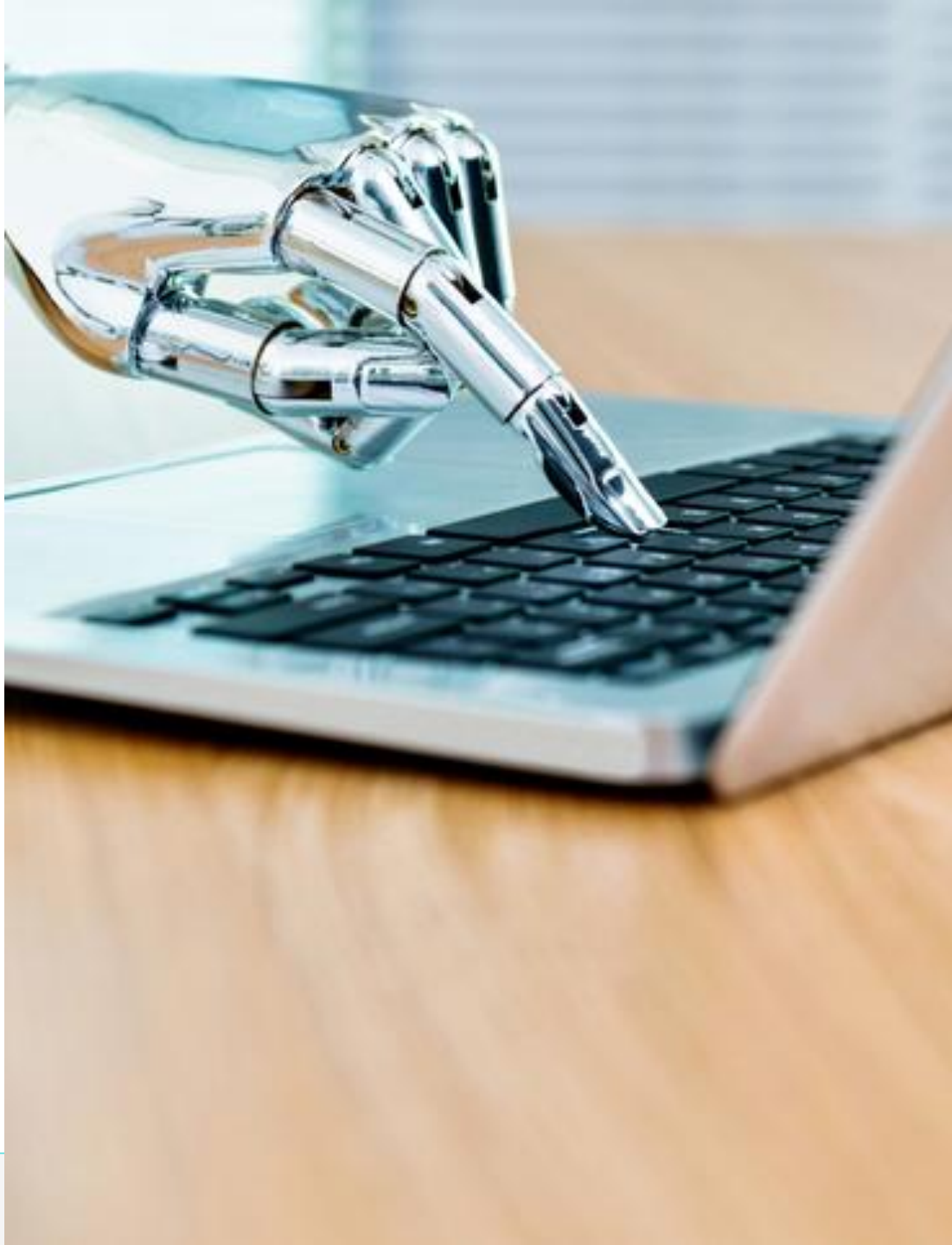
*Director, Liberty Mutual Insurance  
Agent for the Future Advisors*

- 16+ years with Liberty Mutual Insurance
- Previous: Digital media / marketing / news
- My team helps grow your entire business
- Outside of work: Cycling, cooking, travel

**Specializations:** Artificial Intelligence, agency tech, business continuity, sales enablement, perpetuation

[AgentForTheFuture.com](https://AgentForTheFuture.com)

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# Overview

- Don't treat AI like Google
- Using the “5C Framework”
- Privacy and security considerations
- Hands-on prompting
- Flagging problematic advertising language

# A gen AI primer

Get to Know the “5 C Framework”



**AI is not \_\_\_\_\_**  
**\_\_\_\_\_ Google**



AI is a \_\_\_\_\_

\_\_\_\_\_ **powerful tool**



**It can act like \_\_\_\_\_**  
**\_\_\_\_\_ an assistant**



Or \_\_\_\_\_

\_\_\_\_\_ a creative



**As well as \_\_\_\_\_**  
**\_\_\_\_\_ a strategist**



**And a** \_\_\_\_\_  
\_\_\_\_\_ **thought partner**

# Prompting intro

Get to Know the “5C Framework”

“Make me a sandwich”

*Or*

“You’re a great cook. Please give me a recipe for a **sandwich on toasted rye**. It should include pastrami, melted Swiss cheese, a split and grilled knockwurst topped with spicy mustard. Avoid mayonnaise.”

# Prompts have specific ingredients

You don't need to use every component - you can tune the output later

<u>Element</u>	<u>Description</u>	<u>Example</u>
<b>Character</b>	Who should the AI act as?	You're a great cook
<b>Command</b>	What do you want?	A recipe for a sandwich
<b>Context</b>	What are the details?	Toppings, bread type, condiment
<b>Constraints</b>	What to include/exclude?	Limit # of ingredients, avoid mayo
<b>Calibration</b>	How should it sound/feel/look?	Helpful and encouraging

Source: 5C Framework for Effective AI Prompting – adapted and developed by ChatGPT (OpenAI, 2025), based on common best practices in prompt design and communication frameworks.

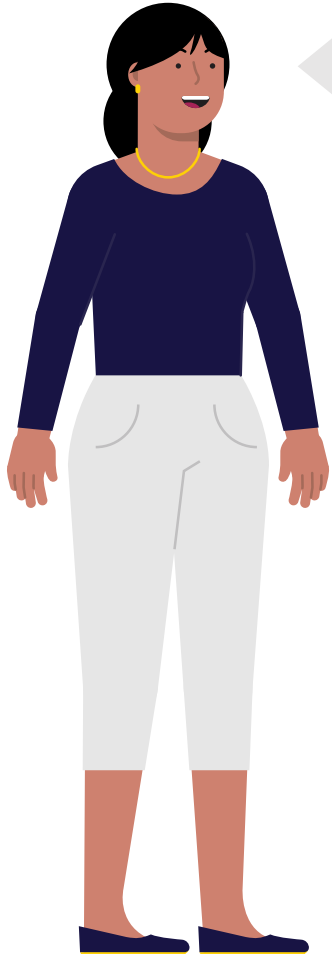
# Preparing a cyber cross-sell message

<u>Element</u>	<u>Description</u>	<u>Example</u>
<b>Character</b>	Who should the AI act as?	Act as a senior commercial insurance advisor
<b>Command</b>	What do you want?	explain what cyber insurance is and why a business would want it
<b>Context</b>	What are the details?	These businesses rely heavily on email and cloud-based systems
<b>Constraints</b>	What to include/exclude?	Educational. No pricing, savings, or scare tactics. Under 150 words. Include a call to action
<b>Calibration</b>	How should it sound/feel/look?	sound professional, calm, and consultative

Source: 5C Framework for Effective AI Prompting – adapted and developed by ChatGPT (OpenAI, 2025), based on common best practices in prompt design and communication frameworks.

# Cyber insurance cross-sell

PROMPT



*Act as a senior small commercial insurance advisor.*

*I'm reaching out to existing small business clients who rely heavily on email and cloud-based systems.*

*Write a short, educational email explaining what cyber insurance is and why it may be worth reviewing based on how their business operates today.*

- *Under 150 words*
- *No pricing, savings, or scare tactics*
- *Do not imply current coverage is "wrong"*
- *Keep the message educational and advisory*

*The message should sound professional, calm, and consultative. Please include a call to action to have the client call or schedule time with me and include a placeholder for a calendar link.*

**Character**

**Context**

**Command**

**Constraints**

**Calibration**

# Privacy and security

Considerations when using AI



AI-generated

# Top AI Concerns

- **Data Privacy** – AI tools may process sensitive client and other agency data; safeguard personal and financial information
- **Accuracy, hallucinations and bias** – AI can generate incorrect policy details or recommendations, creating potential liability
- **Shadow AI use**– Employees may quietly use personal AI tools because they are convenient, leaving leadership in the dark
- **Transparency & Accountability** – Staff and clients need to understand when and how AI is being used in the agency’s workflow

# Mitigating AI Safety Risks

- **Create an AI Acceptable Use Policy** – Define what tools are approved, what data can be shared, and who is responsible for oversight
- **Vet Your Vendors** – Ask how AI models are trained, where data is stored, and whether the vendor complies with insurance regulations
- **Train Your Team** – Educate staff on responsible AI use, how to spot hallucinations and bias, and when human judgment must take priority
- **Keep Humans in the Loop** – Always review AI-generated output before it reaches a client, especially for quotes, claims, and policy documents
- **Set rules for disclosing when you're using AI** – When AI is taking the lead, such as with text and voice chat, transparency builds trust

# Hands-on prompting

Let's get some practice and take AI for a spin

**Open a gen AI tool**

# Download the prompt guide



<https://AgentForTheFuture.com/workshop>

# 1) Create concise, tailored outputs

1. Copy the prompt in the box and paste it into your chat box
2. Hit “enter” and review the content
3. Give a follow-up command to change the style and tone

1

Copy this text:

TIP

- Highlight text in the rounded box
- Ctrl+C to copy

## 1) Create concise, tailored outputs

**ACTION:** Generate cyber insurance cross-sell messaging, then change the style and tone

1. **Copy and paste** this prompt into your AI chat box.
2. **Hit “enter” and review the content**

*Act as a senior small commercial insurance advisor.  
I'm reaching out to existing small business clients who rely heavily on email and cloud-based systems.  
Write a short, educational email explaining what cyber insurance is and why it may be worth reviewing based on how their business operates today.*

- Under 150 words
- No pricing, savings, or scare tactics
- Do not imply current coverage is “wrong”
- Keep the message educational and advisory

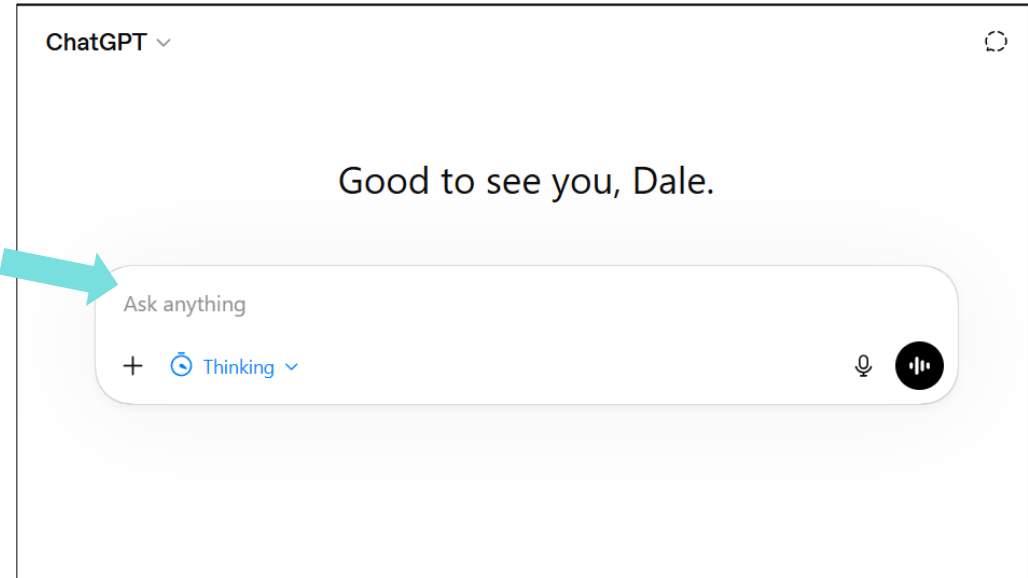
*The message should sound professional, calm, and consultative.  
Please include a call to action to have the client call or schedule time with me and include a placeholder for a calendar link.*

3. Give a follow-up command to change the style and tone. Use this prompt:

*Change the style and tone of this to be more urgent*

2

Paste text here:



The screenshot shows a ChatGPT chat window. The chat history includes the prompt from step 1. The AI's response is "Good to see you, Dale." Below the response is a text input field containing "Ask anything" and a "Thinking" indicator. The interface includes a microphone icon and a refresh icon in the top right corner.



# **TIP:** Start new chats to prevent “bleed” and “rot”

## **Context bleed**

Think of a chat like a whiteboard, or a cutting board

Before it gets covered in notes - or conflicting ingredients - start fresh

## **Context rot**

Ever have too many browser windows open? Performance degrades.  
AI starts to lose the thread of a chat over time.

# **A fresh chat produces better results**

## 2) Use AI as an editor

1. Find the “**Analyze existing content**” prompt
2. Copy the text in the box and paste it into your chat box
3. Replace **[INSERT URL]** placeholder with a link to a page on your website
4. Hit “enter” – After analyzing the output, ask it to rewrite the content

1

Copy this text:

TIP

- Highlight text in the rounded box
- Ctrl+C to copy

### 2) Use AI as an editor

**ACTION:** Use this prompt to analyze your website content to spot ways to reduce customer confusion and improve clarity.

**Instructions:**

1. Get a link to a page on your website.
2. Copy and paste this prompt into your AI chat box.
3. Replace “**[INSERT URL]**” with your link.
4. Run the prompt! (Hit ‘enter’)

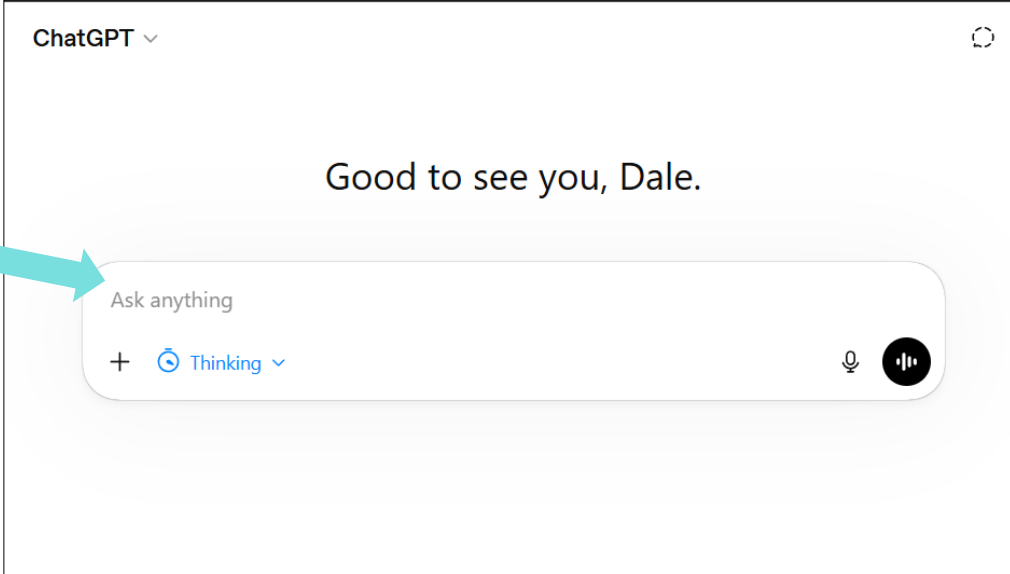
Act as an experienced insurance advisor focused on client education and retention. You are reviewing client-facing messaging used by our agency to communicate with our clients and prospects who have very little understanding of insurance and how it works. Analyze the content on this page and identify where a typical insurance client may feel confused, frustrated, uncertain, or hesitant to respond. **[INSERT URL]**  
For each issue:  
• Explain why the confusion or friction may occur (e.g., assumptions, jargon, timing, missing context)  
• Note our agency’s likely intent vs. how the client may interpret it  
Focus on clarity, trust, and building decision confidence, not sales effectiveness. Use concise bullet points. Do not rewrite the message. Use a practical, constructive tone, as if helping a colleague reduce client confusion and follow-up questions.

5. Once the AI response is complete, ask AI to write a new version of the content. Use this prompt:

Based on your analysis, rewrite this content.

2

Paste text here:



ChatGPT ▾

Good to see you, Dale.

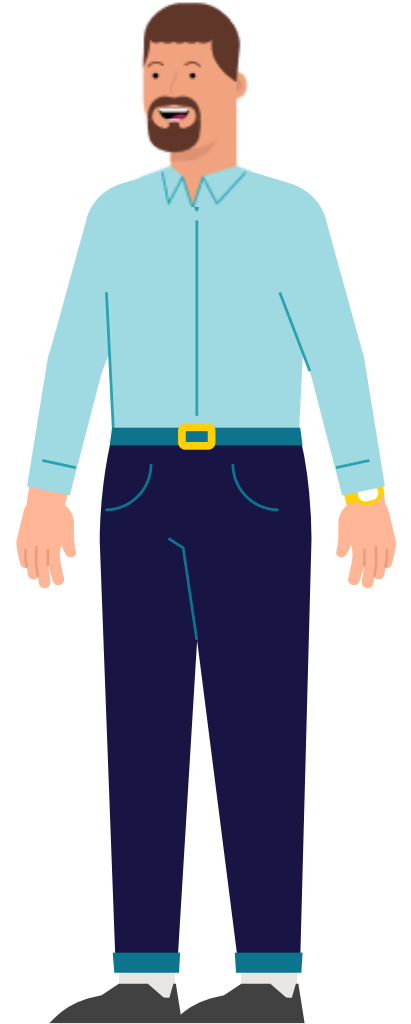
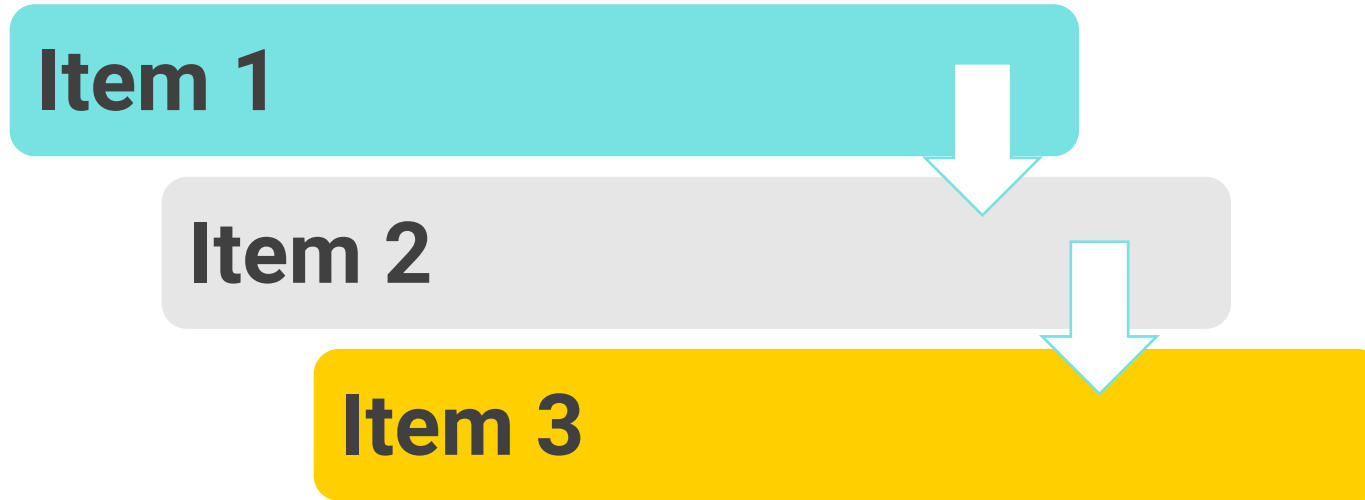
Ask anything

+ Thinking ▾

🎤 🔊

# TIP: Use prompt chaining

The output feeds the next input



# 3) Break a complex project into smaller steps

1. Copy the text in the first box and paste it into your chat box
2. Replace **[agency name]** **[agency URL]** placeholders
3. Hit “enter” – After analyzing the output, test the next prompt

## 3) Break a complex project into smaller steps

**ACTION: Use “prompt chaining”** to have gen AI create in steps instead of trying to do everything at once. Split a bigger request into smaller prompts, run them one at a time, and use the output from each step as the input for the next step.

This makes it easier to review what the AI gave you, catch mistakes early, and refine your direction as you go. Test these prompts:

### Why people should do business with your agency prompt:

*You are an expert insurance marketer.  
Write an article for my agency [agency name] [agency URL] that explains why a prospective client would want to do business with an independent insurance agency.  
Assume the person reading this knows very little about independent agents.*

### When you're comfortable with the initial output, ask for this:

*Now generate two three-part email campaigns aimed at prospective insurance customers - one for personal insurance and one for commercial insurance - who currently have insurance directly from a carrier or a captive insurance agency. Keep the tone and style informative and consultative with a light sprinkling of humor.*

1

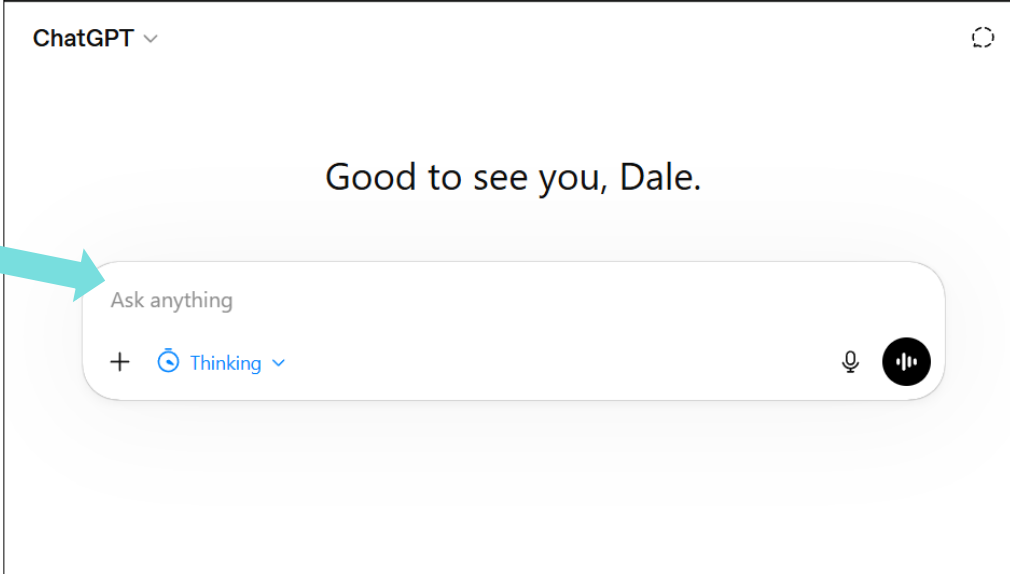
Copy this text:

### TIP

- Highlight text in the rounded box
- Ctrl+C to copy

2

Paste text here:



ChatGPT ▾

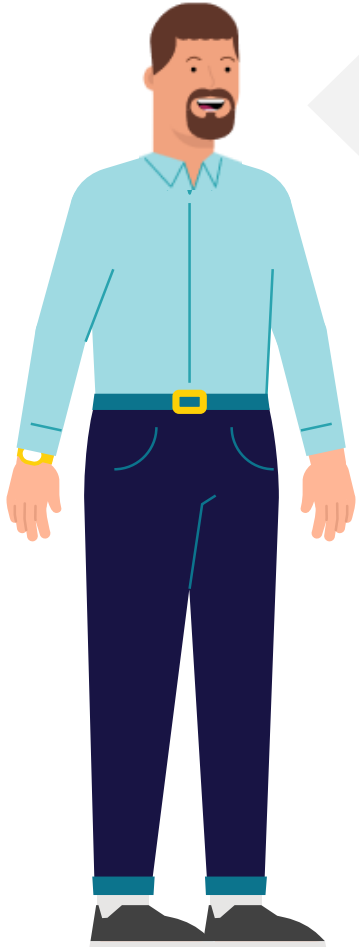
Good to see you, Dale.

Ask anything

+ 🔄 Thinking ▾

🎤 🔊

# When you're unsure about the prompt, ask AI



## What's missing?

*What other information do you need to effectively answer my prompt?*



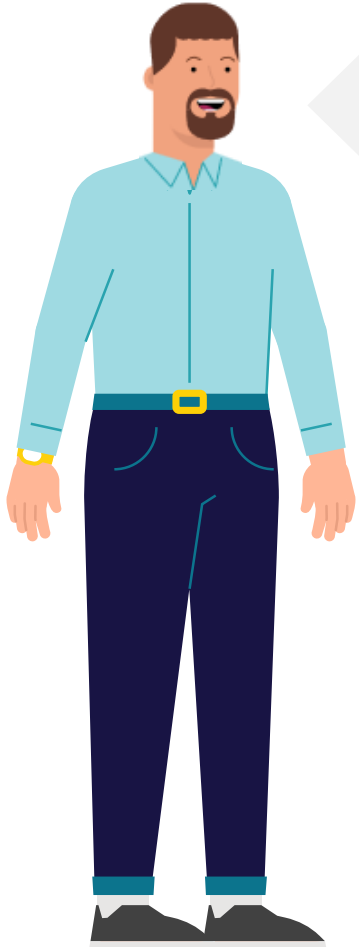
## Prompt improvement

*Evaluate the following prompt and suggest improvements. Be brutally honest - I want this prompt to be effective at [task] and accomplish [goal]*

### Test these with prompts:

- 4) Give AI the context you didn't know it needed
- 5) Ask gen AI to be brutally honest

# Stuck on how to write a prompt? Ask AI for help



## Prompt creation

*"Help me write a short prompt I can use to create..."*

**Test with this prompt:  
6) Let AI write prompts for you**

# 7) Get AI outputs to sound more like you

1. Copy the text in the first box and paste it into your chat box
2. Replace **[agency name]** **[agency URL]** placeholders
3. Hit “enter” – After analyzing the output, test the next prompt

1

Copy this text:

## 7) Get AI outputs to sound more like you

**INSTRUCTIONS:** Use the following prompts to analyze your personal writing style or your agency brand voice. Sharing a few thousand words with gen AI tools is generally enough to get an insightful response. These tools can analyze:

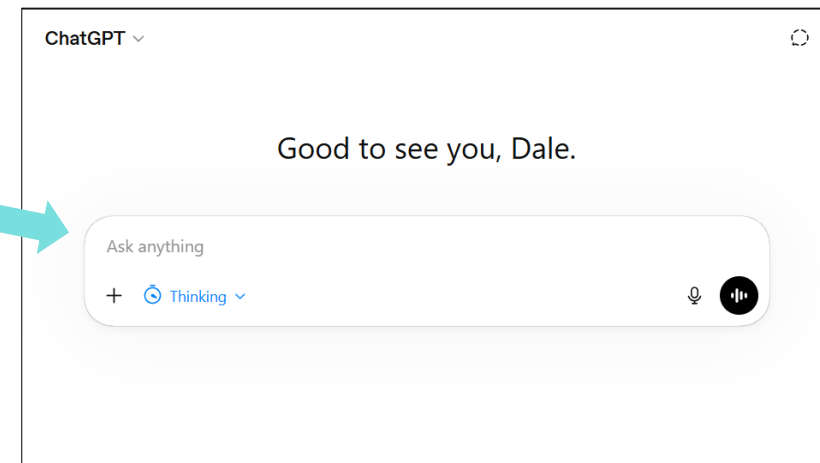
- Content pasted into the chat window
- Uploaded documents
- Links to content you’ve written, or pages on your website

### Quick writing style analysis

*Analyze and describe the writing style for the following text, attachment and/or links. Please also write a prompt I can use to create the same style of writing in future requests.*

2

Paste text here:



# Flagging problematic advertising language

# 8) Flag potentially problematic advertising words

1. Copy the prompt text and paste it into your chat box
2. Insert a link to a page on your website, such as a blog or product page
3. Hit "enter" and review the output for potential revisions

1

## 8) Use AI to Flag Problematic Advertising Language

**INSTRUCTIONS:** Use AI to review agency marketing materials, website copy, and social posts for potential compliance risk, E&O risk, and misleading advertising language under state insurance advertising regulations.

Paste prompt in a new chat window.

Copy this text:

TIP

- Highlight the prompt
- Ctrl+C to copy

You review public-facing property and casualty insurance marketing used by Virginia insurance agents, agencies and producers. This may include website copy, ads, social posts, email copy, producer bios, sales scripts and collateral. Your job is to flag language that may create Virginia insurance compliance risk, E&O risk or misleading-advertising risk, then suggest safer alternatives. Do not give legal advice. Treat wording as context-dependent. Flag language only when there is a clear reason tied to Virginia law, SCC or insurance guidance or practical E&O risk. Focus on language that may:

- Be deceptive or misleading
  - Misrepresent policy benefits, terms, conditions or coverage scope
  - Promise guaranteed savings, coverage or outcomes
  - Overstate protection, such as "full coverage" or "complete protection"
  - Imply unsupported approval, endorsement, authority or insurer relationship
  - Confuse the producer role with a licensed insurance consultant role
  - Suggest improper rebates, incentives or referral fees
  - Suggest certificates of insurance alter, expand or guarantee coverage
  - Suggest claim-adjusting, negotiating or settling beyond an agent's role
- Use these risk categories when relevant: misleading advertising; coverage misrepresentation; substantiation risk; consultant-role confusion; licensing or appointment issue; insurer-relationship or authority issue; rebating or inducement risk; referral-fee risk; certificate-of-insurance risk; claim-handling or public-adjuster confusion; E&O risk from overpromising.

Decision rules:

- "Expert," "advisor," "consultant" or "planner" - not automatically prohibited, but revise if they imply formal credentials, licensed consultant status or advice beyond the producer's role.
- "Trusted" - not automatically prohibited, but revise if it implies verified superiority, official endorsement or an unsupported claim.
- "Best," "lowest price," "cheapest" or "guaranteed savings" - flag when absolute, unqualified or unsupported.
- "Full coverage," "complete protection" or "covered no matter what" - flag as potentially misleading because they may ignore policy terms, conditions and exclusions.
- "Approved," "endorsed," "recommended," "authorized" or "official" - flag when they imply undocumented insurer, regulator or third-party approval.
- Carrier names and logos - flag if they could mislead consumers about appointment, authority, endorsement or the agency's insurer relationship.
- Gifts, incentives, rebates or rewards - flag if tied to buying, renewing or referring insurance in a way that may create a Virginia rebating or referral-fee issue.
- Certificates of insurance - flag if the copy suggests a certificate alters, expands or guarantees coverage.
- Claims help - flag if the copy suggests the agency will adjust, negotiate or settle claims beyond the proper role of an insurance agent.

Review the text, attachment or website link supplied by the user. For each issue, provide a concise table with:

2

Paste text here:

ChatGPT ▾

Good to see you, Dale.

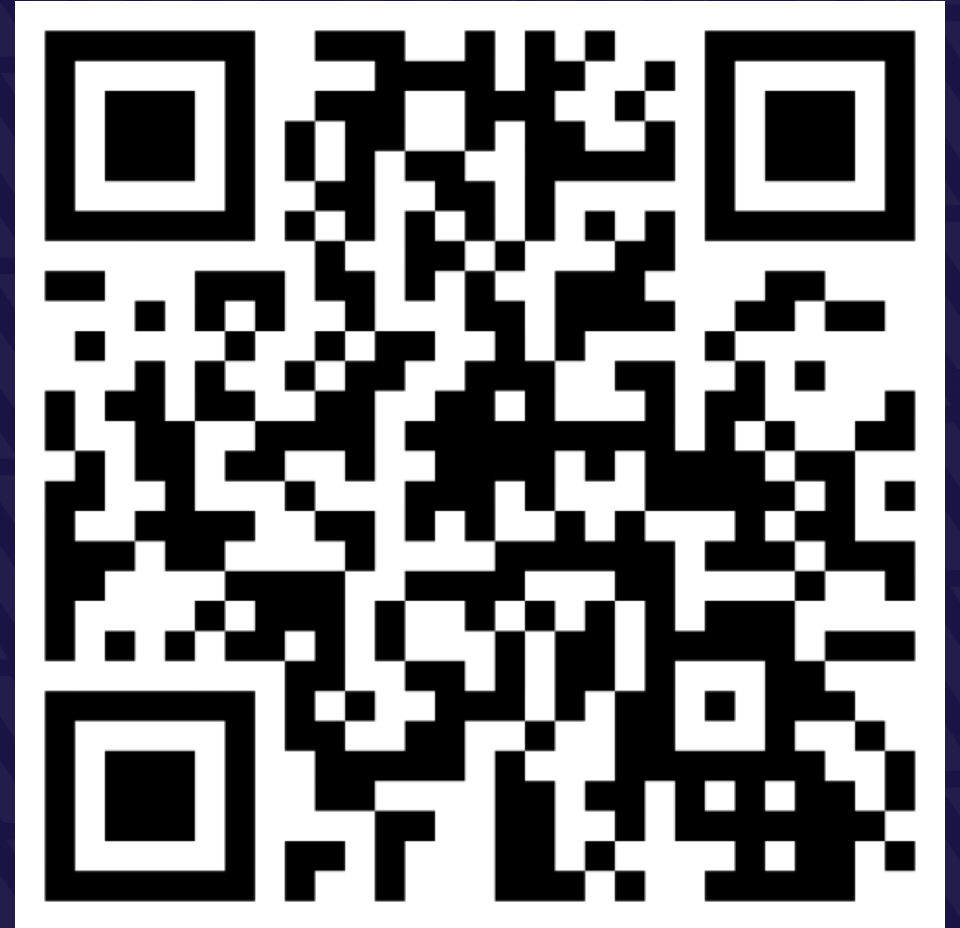
Ask anything

+ Thinking ▾

🎤 🔊

# Thank you!

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Connect with me on LinkedIn!