2. Automated Communication with AI

11. Leveraging Ai 101 · https://clients.financevine.ca/docs/2-automated-communication-with-ai/

This approach uses AI to go beyond simple mail merges and create a more personalized, timely, and scalable communication strategy. The goal is to make sure every client feels seen and valued, even when the agent is busy.

Some Examples:

- **Automated Text Messages**: SMS messages have an extremely high open rate (up to 98%), making them a powerful tool for time-sensitive or critical communications.
  - **Mortgage Example:** An AI system can craft several different template SMS messages that you can send to a lead when their mortgage application moves to a new stage, such as "under review" or "conditionally approved." This keeps the lead informed and reduces the number of phone calls or emails an agent has to manage.
  - **Life Insurance Example:** An AI system can craft several different template SMS messages that you can send to a lead when their Life Insurance application moves to a new stage, such as "under review" or "conditionally approved." This keeps the lead informed and reduces the number of phone calls or emails an agent has to manage.
- **Real-Time, Trigger-Based Communication**: AI systems can be programmed to send a message *the moment* a specific event occurs, making the communication feel highly relevant and prompt.
  - **Mortgage Example:** When a new lead fills out a contact form on your website, the AI can immediately send a "Thank you for your inquiry" email with a link to an online application. This instant response engages the lead while they are still highly interested.
  - **Life Insurance Example:** If a policyholder logs into their client portal but doesn't complete a form or a task, the AI can be triggered to send a quick email offering assistance, like "Hi [Client Name], I noticed you were looking at your policy documents. Can I help with anything?" This proactive help can prevent a client from getting frustrated or abandoning a task.

- **Sentiment Analysis and Smart Routing**: AI tools can read incoming emails or chat messages and understand the sender's tone. If a client seems frustrated or upset, the AI can recognize this and automatically route the message to a human agent for personal attention. This ensures that serious issues are handled with empathy and care, rather than a generic automated response.
- **AI-Driven Content Curation**: For long-term follow-ups, an AI can be used to select and share relevant content with clients. For example, for a client who is a first-time homebuyer, the AI could send or craft a quarterly email with links to blog posts about home maintenance tips. For a client interested in retirement planning, the AI could send articles about market trends or changes in tax laws. This keeps the agent top-of-mind by providing ongoing value without a direct sales pitch.