

**PC26** Trustmark  
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**AMPLIFY**

Trustmark 



# AI for Prospecting: Amplifying Your Book of Business



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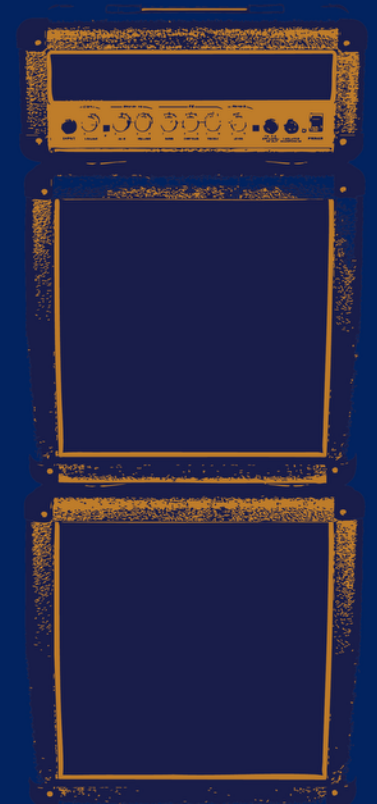


# Same Game. Smarter Tools



# Today's Agenda

- Getting Started — The Practice Green
- What is AI & Automation?
- Actionable Steps for Successful Prospecting With AI
- Live Range Demo Session
- Swing Thoughts & Takeaways





“No matter how good you get, you can always get better...& that’s the exciting part” - Tiger Woods



- *Save Time*
- *Sell Smarter*
- *Be More Consistent*
- *Stay Ahead*

**Using AI's Not Going To Replace Your Work, It's Going To Improve It**

# What is Automation?

## Automation = Rule Based

- Follows a set of predefined instructions
- Great for repetitive, predictable tasks
- Automation Resources:
  - Salesforce
  - HubSpot
  - LinkedIn Sales Nav



# What is AI?

## AI = Learning Based

- Analyzes data, learns patterns, and adapts over time
- Can make recommendations or predictions
- Examples:
  - ChatGPT
  - Copilot





# Vintage Spin to Modern Control

## Balata Era

- *Inconsistent Performance*
- *Limited Feedback*
- *Not as accurate*



## Pro V1 Era

- *Consistent Repeatable Results*
- *Data Driven Optimization*
- *Precise*





# AI is Your Rangefinder for Prospecting

## Old Method

- *Manually searching for leads*
- *Guessing who the decision maker is*
- *“Spray & Pray” outreach*



## New Method

- *Identify the right employers*
- *Pinpoints decision makers*
- *Scores leads by likelihood to engage*



***AI doesn't choose the club, it gives you the exact number***

# How To Prospect 1% Better Each Day With AI



## Researching Potential Clients In Your Area

- Helps quickly identifies the right contacts and decision-makers
- It summarizes company info and current news and data to speed up research
- It drafts personalized outreach based on public information

*“Create a list of trucking companies with 500 or more eligible employees and a US headquarters in Tennessee.”*



# How To Prospect 1% Better Each Day With AI



## Let it Help You Draft Email Content

- Generate clear, professional drafts in seconds
- Save time on your repetitive or routine email types
- Let's you personalize quickly instead of starting from scratch

*“Help me draft an introduction letter about Trustmark Life with Long-term Care to an HR professional responsible for evaluating employee benefits.”*

# How To Prospect 1% Better Each Day With AI

## Start a Prompt Library for Yourself

- Save your prompts and make them easily accessible so you can quickly and easily get the information & outputs you needs
- It will help you:
  - Save time
  - Ensure consistency
  - Boost client collaboration





# A Few Tips on Effective Prompt Writing (From AI!)

## The Skill of the Future

- Define your goal
- Use instructional words
  - "Summarize"
  - "Compare"
  - "Draft"
- Provide context
- Specify sources
  - Upload with discretion!
- Refine and iterate



# Live Range Session

*Copilot Interactive Session*





**Interested in continuing  
the conversation on AI?**

**Join us for our Panel:  
Understanding What's Next  
for AI!**



## **Session**

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**Panel: Understanding  
What's Next for AI**

**Tuesday, Feb 3  
1:15 – 1:50 PM  
Belle Meade**

# Key Takeaways

## Embrace AI for Prospecting

- AI can help you streamline mundane tasks so you can focus more on relationship building
- AI shouldn't be used to replace your responsibilities, but make them more efficient
- You do not need to be an expert on day 1 — start small!

***"No matter how good you get, you can always get better, and that's the exciting part."*** — Tiger Woods





**Thank you!**

