

PC26

Trustmark
Producer Conference
Nashville • February 1-4, 2026

AMPLIFY

Trustmark 

AI for Prospecting: Amplifying Your Book of Business



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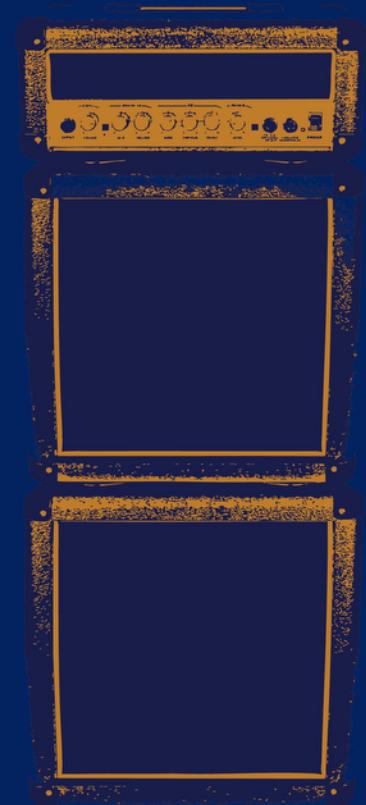
World Class Caddie

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 need
- 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

**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!

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Thank you!

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