GREAT MINDS AND ONE BALD GUY

FROM INSIGHTS TO IMPACT

Candid Conversations about Tough Topics Facing Independent Agents and Advisors

Season 1: Episode 3

Episode Title: Take the "Cold" Out of "Cold Calling" with AI

Thank you to our experts who contributed to this conversation: **Sam Richter**, CSP, CPAE, Professional Speaker Hall of Fame, Founder of **IntelNgine.com** and and **IntelLead.ai**

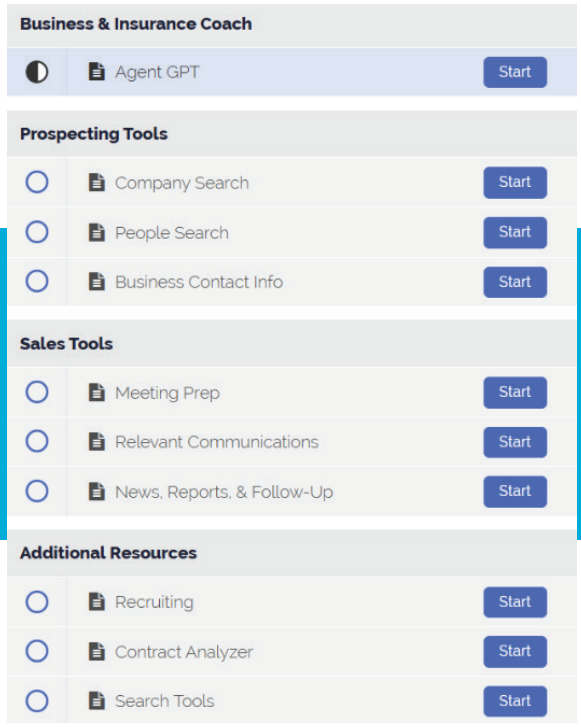
Hosted by: Todd Villeneuve, Managing Partner, IFC National Marketing

> "If I could wave a magic wand and give you 5 extra hours a week, or 10 extra hours a week, how could you focus on providing your clients more value, and your employees more value, your family more value, your community more value? Because that's the promise of AI. Embrace it to free up your time to focus on what only humans can do
> — **Sam Richter**

As artificial intelligence (AI) continues to boom and transform the way the world lives, works, and plays, IFC National Marketing's Managing Partner Todd Villeneuve sat down with and world-renowned sales and AI expert, Sam Richter, to talk about why insurance and financial professionals need to overcome their fear and embrace AI.

Why Insurance and Financial Professionals Need AI:

- Harness data and business insights never before widely available.
- Save time automating repetitive tasks, such as summarizing meetings notes, completing proposals, drafting follow-up emails, and more.
- Turn cold calling into "warm calling" by quickly generating information about how to talk to individual prospects based on thousands of consumer data points.
- Identify plan enrollment and product options for clients. Gen Z clients who are purchasing insurance for the first time will gravitate to these tools naturally, so adopting AI will enable you to capture the next generation of clients.
- Give you time to focus on the human side of your business by automating repetitive processes.



Check out the Agent Intel Engine from Sam Richter.

> "AI is not the new iPhone. It's not something you can decide to go without. No, you need this. You need to get on board, or you're going to get left behind. But don't be afraid of it, either, because it's easy to use. There are lots of places where you can learn how to use it and lots of tools that make using it easier. And when you embrace it, it frees you up to do what only humans can do, and that's be human."
> — **Sam Richter**

Catch more insights from Sam Richter during the IFC 2026 Spring Health Road Show Tour. Register for one of our 11 events, beginning in early March.

Register today!

Finding Tools & Learning to Use AI. Note, this is only a representative sample of available tools and resources. AI solutions and education are ubiquitous, so simply look for options that have a high number of users, reviews, and views.

- Agent Intel Engine. AI-powered tool for prospecting. Use the Meeting Prep feature to run a personality profile on individual or commercial prospects.
- Claude.ai
- ChatGPT
- Gemini
- YouTube. Search for user-friendly videos on how to use and train AI tools to perform better for your business.

> "In the history of the world, no one's ever gotten back to you when you ask them for a referral. So I don't believe in referrals, I believe in introductions."
> — **Sam Richter**

When training an AI tool, use this framework as you request information:

- What is your goal?
- Who are you?
- Who's your intended audience?
- How do you want your information delivered?
- What's the environment that should be received?

Pro Sales Tip: Introductions vs. Referrals.
In a survey of **50,000 buyers of financial services products, 97%** said they would make a warm introduction to a financial professional if asked for a named introduction (i.e., Do you know Joe Smith? Do you know Sally Jones?)

Conversely, in a survey of **5,000 advisors and agents, only 2%** said they asked for personal introductions to potential new clients.

Free Up Time to Do What You Love.
Consider a task that takes you 20 minutes to complete, and you do that 100 times a year (conservative estimate). Using AI to complete this task saves you 2,000 minutes. You now have 53 weeks in my year, where other agents only have 52.

Watch Season: Episode 3
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