

AI prompt cheat sheet for brokers



Copy, paste, and adapt these to your AI tool of choice—no setup required.

FOR OPS LEADERS

Clean up manual data work

1 *Here's a census file. Identify any missing fields, inconsistent formatting, or data that looks incorrect. Flag each issue and suggest a fix.*

2 *Convert this carrier summary document into a structured table with columns for: carrier name, plan type, effective date, and key terms.*

Why it works

Manual data cleanup is the highest-ROI use case for AI in benefits ops right now—the task that takes the most time relative to the value it delivers.

Prep for renewals faster

3 *Here's a client's current benefits summary. Draft 5 clarifying questions I should ask the carrier before the renewal meeting.*

4 *Compare these two carrier proposals side by side. Highlight differences in premium, coverage, and exclusions in plain language a client could read.*

Why it works

Renewal prep shouldn't take half a day. These prompts compress the research step so your team can spend time on the conversation, not the document.



Understand what's landing with prospects

5 *Here are transcripts from my last 10 prospect calls. What objections come up most often, and how are we responding to them?*

6 *Based on these call transcripts, what pain points do HR leaders at mid-market companies mention most? Summarize the top 3 with direct quotes.*

Why it works

Your call recordings are a goldmine most teams don't mine. This surfaces patterns your producers already know intuitively—just faster and at scale.

Build a smarter pipeline

7 *I'm a broker targeting mid-market employers in [region]. What industries are growing fastest there & what benefits challenges do they typically face?*

8 *Here's my current prospect list. Based on company size, industry, and renewal month, which accounts should I prioritize this quarter and why?*

Why it works

AI won't replace your producers—it helps them walk into every meeting already knowing what matters to the person across the table.

Turn your data into decisions

9 *Here's an export of our RFP activity from the last 12 months. Which carriers have the fastest response times, and how has that changed year over year?*

10 *Based on this data, which 3 carriers should we lean on more—and which are underperforming relative to the volume we're sending them?*

Why it works

You already have this data. The question is whether you can act on it in 5 minutes or 5 days. That's the difference AI makes right now.

These prompts work with any AI tool—Claude, ChatGPT, Copilot, and others. Paste your data directly into the chat window or upload the file when prompted.