



Singapore College
of Insurance

AI-Driven Client Acquisition for Insurance: Campaigns, Content & Conversion

Register Now



Monday, 16 November 2026
2.00 p.m. – 5.00 p.m.



3 CPD hours



Singapore College of Insurance

AI can now draft a month of social posts in minutes, score thousands of leads overnight and write a personalised follow-up for every prospect. Very little of that becomes new business unless it is accurate, compliant and aimed at the right people. This course shows insurance and financial advisory professionals how to use AI across the client acquisition journey, from targeting and campaign content through lead nurturing to the first advice conversation.

Through hands-on exercises, participants create campaign content with AI and then review it the way a compliance officer would, catching the errors models routinely introduce. They learn to read AI lead scores sensibly, personalise outreach without crossing consent and privacy lines, and keep the licensed adviser in charge of the advice. Participants leave with a practical prompt-and-review workflow and a clear set of measures for telling real conversion gains apart from extra activity.



Who should attend

- Agents, financial advisers and representatives who generate their own leads
- Marketing, digital, brand and content teams in insurers, agencies and brokerages
- Distribution, bancassurance and partnership managers running campaigns
- Sales support and CRM staff who manage lead lists, nurture sequences and follow-up
- Anyone who reviews or approves marketing material produced with AI

Prerequisites

None. No technical background is required. Familiarity with your organisation's marketing approval process is helpful.



Learning outcomes

By the end of the course, participants will be able to:

- Explain where AI adds measurable value at each stage of client acquisition (targeting, content, nurturing and conversion) and where it mainly adds volume.
- Produce AI-assisted campaign content using a repeatable prompt-and-review workflow that checks accuracy, fair presentation, required disclosures and brand voice.
- Identify the consent, privacy and fairness boundaries on using client and prospect data for AI targeting and personalisation.
- Interpret AI lead scores and next-best-action suggestions as probabilities, and hand over to a human advice conversation at the right point.
- Recognise the marketing claims and AI practices that must never be used in insurance, such as fabricated testimonials, undisclosed AI personas and implied guarantees.
- Evaluate campaign performance using metrics that reflect real business, including qualified appointments, policies issued, early lapses and complaints.



Trainer

Ms. Val Yap
Founder, Goma AI

The workshop is led by Val Yap, former founder of PolicyPal. With experience building technology businesses in Singapore and running AI workshops with SMEs and startups in Silicon Valley, Val helps non-technical professionals turn AI ideas into practical, deployable solutions.

