BreakPoint Systems



A GUIDE FOR BUSINESS OWNERS

Found. Called. Booked.

How an experienced insurance agency stopped chasing bought leads and started getting chosen by customers who found it through AI, and what it means for your business.

By **Billy Jordan Jr.**, Founder, BreakPoint Systems

BEFORE YOU START

I didn't set out to become an AI search expert. I set out to stop paying for leads.

I have owned and run The Jordan Insurance Agency since 2006. For most of those years, growth meant the same thing it means for most service businesses: buy leads, run ads, and chase people who filled out a form on someone else's website and then got a call from five other agents before lunch. It worked, sort of. It was also expensive, it was exhausting, and it never got easier.

Then the way people look for help changed. Instead of scrolling through a page of links, more and more people now ask a question, to Google, to ChatGPT, to Copilot, or to the assistant on their phone, and get one answer back. Sometimes that answer names a business. I wanted it to name mine. Twenty years in this business taught me to recognize a real shift. This was one, and I wasn't going to wait for my industry to catch up.

This guide is what I learned getting there: what changed, how AI decides who to recommend, what we actually did at The Jordan Insurance Agency, and what it took. I'll tell you the truth up front. It was a lot of work. The hard part was never knowing that we needed a system. It was figuring out which system we needed to get real traction, and that took months of trial and error. You can do this yourself. You should also know exactly what you're signing up for.

Read it with your own business in mind. Near the end there's a short scorecard so you can see where you stand today.

Billy Jordan Jr.

Founder, BreakPoint Systems · Owner, The Jordan Insurance Agency since 2006

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CHAPTER 01

Your customers stopped searching. They started asking.

For twenty years, getting found online meant getting onto page one. That page is quietly being replaced by a single written answer.

The old way looked like this: a customer typed a few words into Google, got ten blue links, opened four tabs, and compared. The new way looks like a conversation. A customer asks a full question, such as *"Who's a good Medicare agent near me who will explain my options without pressure?"*, and gets back a paragraph that summarizes, compares, and often recommends.

45%

of U.S. consumers have used AI tools like ChatGPT to get local business recommendations, up from 6% a year earlier.

BrightLocal, Local Consumer Review Survey, 2026

2B+

people a month see Google's AI Overviews, the AI-written answers at the top of search results.

Alphabet earnings call, July 2025

8%

of searchers clicked a regular result when an AI summary appeared, compared with 15% when none appeared.

Pew Research Center, July 2025

What this means for a service business

The page of ten results has become a short list of two or three names. If your business isn't one of them, you aren't in the conversation, no matter how good you are at what you do.

There's good news inside that change. The customer who does call you after asking AI has already done the homework. They've read about you, compared you, and decided you're worth a call. That is a better customer than any lead you can buy.

> Ranking used to mean being on page one. Now it means being in the answer.

The businesses that understand this early will own their markets for years, because once AI tools learn to trust a source, they keep coming back to it. The businesses that wait will spend more and more on ads to get a smaller and smaller share of attention. This is the wave. The only question is whether you ride it or watch it from the sidelines.

CHAPTER 02

What AEO is, and what it isn't

You'll hear SEO, AEO, and GEO. Here's what they mean in plain English.

SEO (search engine optimization) is the work of helping search engines find your pages, understand them, and rank them in a list of results.

AEO (answer engine optimization) is the work of helping AI tools understand your business well enough to trust it, quote it, and recommend it inside the answer itself. You may also hear it called GEO (generative engine optimization) or AI search optimization. For a business owner, they point at the same goal: being the business the answer names.

Two words you'll see in this guide: a **citation** is when an AI answer links to or references your website as a source. A **mention** is when an AI answer names your business, with or without a link.

	SEO	AEO
The goal	Rank a page in a list of links	Be named or quoted in the answer
Starts with	A keyword	A question, asked the way a real person asks it
A win looks like	A click to your website	A citation, a recommendation, and a phone call
Built on	Relevance and links	Clear answers, depth, consistency, and proof from other trusted sources
Measured by	Rankings, impressions, clicks	Citations, mentions, AI referrals, calls, and bookings

THEY AREN'T COMPETITORS

AEO sits on top of a healthy SEO foundation, and a slow, confusing website struggles with both. In our own work, we built the SEO foundation first, and our visibility in Google and in AI answers grew from it together.

Three myths worth dropping

"It's a trick or a hack."

It isn't. AI rewards what a smart customer rewards: clear answers, real expertise, and proof that others trust you.

"Just add an FAQ page."

One page won't do it. AI trusts sources that cover a subject thoroughly and keep it current.

"Only big brands get picked."

For local questions, AI looks for the trusted local specialist. That can be you.

CHAPTER 03

How AI decides who to recommend

No one outside these companies knows every detail of how AI chooses sources, and it changes often. But the patterns are clear, and they match common sense.

1

Clear answers to real questions

AI tools pull short passages that directly answer the question asked. A page that answers a customer's question in plain language, right up front, is far more likely to be used than a page that makes them dig.

2

Depth on your subject

One page about "insurance" won't make you an authority. Complete coverage of the topics you serve, including the questions customers ask before, during, and after they buy, tells AI that you are the source worth trusting on that subject.

3

Proof from other places

Your own website saying you're great isn't enough. AI looks for confirmation elsewhere: reviews, listings, articles, and mentions on sites it already trusts. Being licensed or certified matters, but it's the starting line, not the finish.

4

Consistency everywhere

Your business name, services, location, and contact details should match everywhere they appear. When the facts conflict from one place to the next, AI becomes less confident about recommending you. (More on your brand's look on the next page.)

5

Freshness and easy access

Current content that's published, indexed quickly, and technically easy for machines to read gets used. Outdated pages, slow sites, and content that AI tools can't easily read get skipped.

ONE MORE THING MOST PEOPLE MISS

Different AI tools draw on different sources. Microsoft's Copilot leans heavily on Bing, while Google's AI answers draw on Google's own index. Strength in one doesn't guarantee you show up in the other.

> AI doesn't recommend the business with the biggest ad budget. It recommends the business it understands and trusts the most.

Getting found is only half the job. Your website has to win the call.

It isn't enough to just have a website. You need a website that converts: one that turns a visitor who found you into a customer who calls or books.

A website that converts

When AI or a search engine sends someone your way, your website gets a few seconds to make a first impression. An attractive, modern site tells people you're established and you care about the details. A cluttered or dated one sends them back to the answer to try the next name. A website that converts:

- Looks professional and current on a phone, not just on a desktop.
- Says clearly, right up front, what you do, who you do it for, and where.
- Shows proof: real reviews, credentials, and how long you've been doing this.
- Makes the next step obvious and easy, such as booking a time on your calendar.

When was your website last updated?

Scroll to the bottom of your homepage. If the copyright date is years out of date, visitors notice. If your website is out of date, people wonder what else is. Changing a phone number or adding a page now and then isn't the same as keeping a website current. The design, the content, and the details all need to look like a business that is open, active, and paying attention.

One brand, everywhere

As you build your presence on other trusted websites, people will follow those links back to you. Your website, social media pages, business listings, and directory profiles should all look and sound like the same business: the same name, logo, colors, photos, and description. If you run more than one business, each brand should be consistent everywhere it appears. When someone finds a different logo on Facebook, an old description on a directory, and a third look on your website, trust drops, and AI becomes less sure it's looking at the same business.

A FIVE-MINUTE TEST

Open your website, your Google Business Profile, and your main social media page side by side. Do they look like the same business? Is the information identical? Is the year at the bottom of your website this year? If any answer is no, fix it before you spend another dollar trying to get found.

CHAPTER 04

What we did at The Jordan Insurance Agency

Insurance is one of the most regulated, competitive industries there is. If this approach could work there, I believed it could work almost anywhere. Here is the order we did it in, and why.

1

We fixed the foundation first.

Our website had to be more modern, faster, and more attractive. Having just any website wasn't going to be enough for the strategy we had in mind. We needed a website that converts, one that turns a visitor into a phone call or a booked appointment. Customers judge you by your website in seconds, and AI tools judge you by how easily they can read and trust it. A slow, dated site loses with both.

2

We let customers choose us.

We replaced the contact form with a calendar built right into the site. A contact form starts a game of phone tag. A calendar asks the customer to make a decision: *I want to talk to this business*. That one change cut down the daily back-and-forth, and the people who booked had already decided they wanted to work with us.

3

We listened to what people were asking.

We researched what people were actually searching for about the products and services we offer: Medicare, Health, Home, Auto, and Life Insurance. Not what we wanted to say, but what customers wanted to know.

4

We built a blueprint and published consistently.

We put together a plan for what to create, who it was for, and in what order. Then we created the content, published it, and got it indexed as quickly as possible, while keeping track of how much we were writing and what each piece was written to answer.

5

We measured, found the gaps, and filled them.

We watched which topics were working and where we were missing. Where there were gaps, we wrote more: different angles, deeper answers, new questions. We became the expert in the areas that would bring the right people to us. Inside our business we call this *feeding the monster*, because it never stops being hungry.

6 We earned trust beyond our own website.

Being a licensed agent matters, but AI looks for proof from other sources. We studied where citations made a difference: which sources got cited in our industry, and why they got cited. Then we built our presence there and kept building on it.

7 We got ready for the phone to ring, and it kept ringing.

As the calls kept coming, we needed an AI receptionist dialed into our business to quarterback every one of them: answer common questions, route the caller, and book the appointment, so our customer service team could keep doing their jobs. Then we hired an additional support person, because the volume of quote requests needed more hands.

8 We never stopped tuning the system.

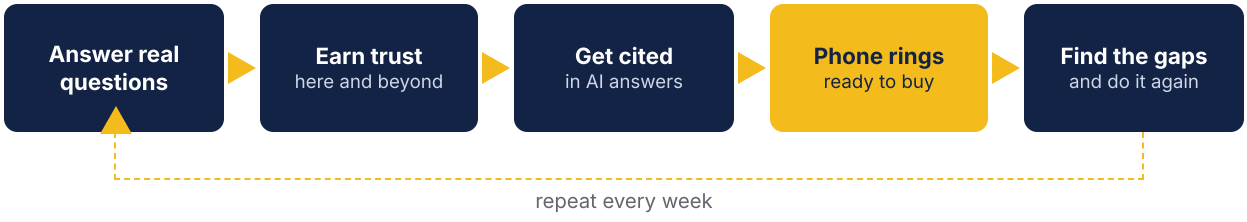
We built our system from the beginning, and then kept adjusting it based on what the numbers told us. Around our 90-day mark, our clicks from Google roughly doubled in a single month. Most of what we know now, we learned by getting it wrong first.

WHAT WE DIDN'T DO

We didn't buy leads. We didn't run ads on Google, Facebook, Instagram, or TikTok. We still don't. Every call we get is inbound: a person who did their research, found us, and chose to call.

The visibility flywheel

Each turn makes the next one easier. Stop feeding it and it slows down.



None of these steps is a secret on its own. The difference is doing all of them, in the right order, every week, and measuring what happens. That is where most businesses stall, and it is the subject of Chapter 6.

We turned our answers into a podcast

Once the articles were working, we gave every one of them a second life, in a format a lot of people prefer: audio.

The Jordan Insurance Agency now has its own podcast, **Smart Coverage. Real Advice.** Every article we publish can become an episode. The same questions customers are asking, answered out loud, in plain English.

Why a podcast helps with AI search

- **More places your expertise lives.** AI tools don't only read your website. They look across the web for signs that a business really knows its subject. A podcast puts your answers in another format, on a podcast host, with its own page and description for every episode.
- **A steady signal that you're active.** A show that keeps publishing tells people, and the tools that recommend businesses, that someone is home and paying attention.
- **Each episode gets its own page on our website.** That gives search engines and AI tools more readable text tied to the same expert answer, and it gives visitors another reason to stay.
- **Some people would rather listen.** A customer who will never read a 1,200-word article might play a ten-minute episode in the car.

How we keep it from becoming a second full-time job

1. **Start from what's already published.** Each episode is built from an article we already wrote and reviewed, so there's no blank page.
2. **Script it, then check it.** The article becomes a conversational script, and the script goes through a compliance edit. In a regulated industry, what you say out loud matters as much as what you write.
3. **A person approves every episode.** Nothing is released until a person on our team signs off. Then it's produced with AI voice and audio tools, scheduled for release, and its episode page goes up on our website.

IS A PODCAST RIGHT FOR YOU?

Only after the foundation is in place. A podcast multiplies answers you've already earned. It doesn't replace them. It's also the newest part of our system, so we're not putting numbers on it yet. We'll tell you what it does once we've measured it long enough to be sure.

CHAPTER 05

The results

Here's what Google recorded for The Jordan Insurance Agency in 2026, straight from Google Search Console, along with what the phones are doing.

2,196
Google clicks in October 2026, up from 118 in June

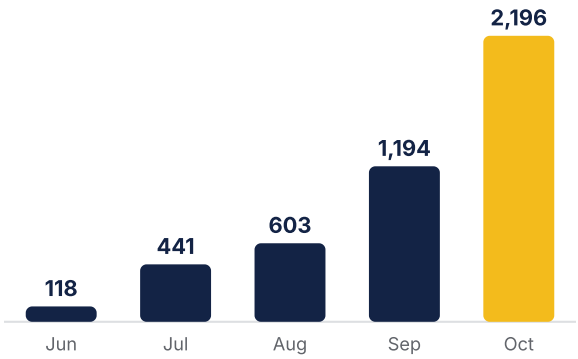
18×
About 18 times our starting month, four months later

448,909
Times shown in Google in October, up from 38,804 in June

$0
Spent on ads or bought leads (owner-reported)

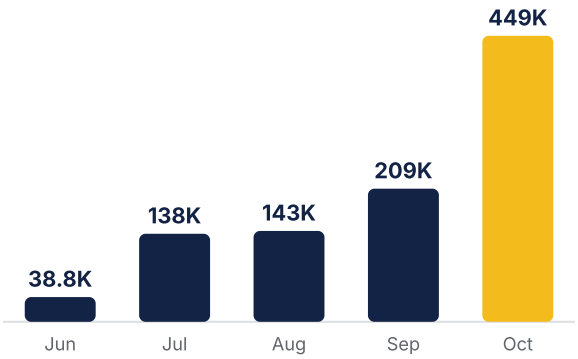
Clicks from Google Search

Monthly totals · Google Search Console. A click is a person who chose to visit the site.



Times shown in Google

Monthly impressions · Google Search Console. Counted whether or not anyone clicked.



What it looks like on the phone

As of November 2026, the agency is getting between five and seven new-lead conversations a day, counting both inbound phone calls and appointments booked through the calendar on our website. Many of the people who call have already researched their options and are ready to talk about coverage: people new to Medicare, families and businesses looking for Health Insurance, households shopping Home and Auto coverage, and people looking for Life Insurance.

Sources: Google Search Console for thejordaninsuranceagency.com (Search type: Web), complete calendar months, June through October 2026. A click is a person who chose to visit the site from Google. An impression is a time the site was shown in Google results, whether or not anyone clicked. Lead volume and ad spend are reported by the owner. These results reflect The Jordan Insurance Agency's market, effort, and starting point. They are not typical, and your results will depend on your business.

Five to seven calls a day doesn't sound like much. Here's why it is.

The number of calls is only half the story. The other half is who is calling.

The people who find us through their own research are not the same people who show up on a purchased lead list. They aren't shopping five agents at once. They chose us before they picked up the phone, and they tend to be the kind of clients who, in a commission business, are well worth the time it takes to serve them.

One call, more than one policy

A single conversation often covers more than one need. We regularly talk with a household where one person is new to Medicare and another needs Health Insurance, both new clients on the same call. Many of those same households then ask us about Home and Auto coverage, because we offer that too. One call can turn into several policies.

Clients who stay

A client who brings several policies, and who came to us because they trusted what they read, tends to stay. Better retention means the value of each new client keeps paying off for years, not just at the sale.

DOING LESS, GETTING MORE

Five to seven qualified conversations a day, from people who already chose us and often bring more than one policy, are worth far more than a stack of bought leads that five other agents are also calling. Our team spends its time with better clients instead of chasing more of them.

Easier to close, with less chasing

When someone has already read your answers, compared you, and chosen to call, the conversation starts with trust instead of a cold pitch. You aren't racing five other agents for the same person, and you don't have to be a natural salesperson to close. These calls close at a higher rate than the bought leads we used to chase, and every piece of content we publish keeps paying off in better conversations.

Call and client patterns are reported by the owner of The Jordan Insurance Agency and reflect that agency's market and services. Your results will depend on your business.

CHAPTER 06

The part nobody tells you: this is a 40-hour-a-week job

Every step in Chapter 4 repeats, and it doesn't stop.

Research the questions. Write the answers. Publish them. Get them indexed. Check what's working. Find the gaps. Write more. Keep the website fast and current. Watch which sources AI is citing in your industry, and earn your place there. Then do it all again next week.

Done by hand, keeping up with optimization alone is close to a full-time job. When we got to the end of our first stretch and saw the progress, I knew we couldn't keep it going the way we started. Trial and error got us there. It wasn't going to keep us there.

So we built systems.

We put three kinds of automation in place, and I'd tell any business owner they need all three:

- **A system that helps create the content,** based on what customers are asking and where the gaps are.
- **A system that publishes it** and gets it in front of search engines and AI tools quickly, including turning articles into podcast episodes.
- **A system that keeps the website optimized,** so the foundation never slips.

Without them, you're looking at that 40-hour week, every week.

If you do it yourself, be honest about what that costs. It's nights and weekends. It's time away from your family and your business. It's reading, testing, and keeping up with platforms that change every month. Most owners don't fail because they can't do it. They fail because they can't keep doing it.

YOU HAVE TWO JOBS

One job is running your business and selling your product. The other is feeding the visibility engine. Most owners can only do one of them well. When they try to do both, one slips, and it's usually the marketing. That's when you lose traction, because visibility compounds when it's consistent and fades when it's neglected.

> Trial and error is how we got here. Systems are how we stayed here.

Software alone won't do it

The tools exist. That isn't the problem. The problem is that almost none of them simply bolt onto your business.

There is no shortage of software that promises to write your content, answer your phones, and grow your visibility. What most of it can't do is understand your business: your services, your customers, the questions they ask, and how your team actually works. Out of the box, it's generic. Set up poorly, it produces generic results.

If you don't have the time or the know-how to set a tool up properly, you're renting time on someone else's program, and the outcome you're paying for won't show up. What works is a system that is tailored to your business, connected to how you operate, and able to run on automation, without you having to do the work every day.

The real cost of doing it yourself

Doing it yourself feels like the way to save money. In practice, you make up for it in time: your evenings, your weekends, and the hours you would otherwise spend serving customers and selling. Most business owners are not great at marketing and operations at the same time, and nobody should have to be.

What "tailored to your business" should mean

- Built around your services, your customers, and the questions they actually ask.
- Connected to the tools you already use: your website, calendar, phones, and CRM.
- Runs on a schedule without you pushing it, and shows you what it did.
- Adjusted as the numbers come in, not set up once and forgotten.

> You can't save your way to more time. At some point, you have to spend money to get your time back.

That is the reason BreakPoint Systems exists. We build the system around your business and keep it running, so you can do the part you want to do most: serving your customers and selling your product.

CHAPTER 07

Why inbound beats bought, every time

The whole purpose of doing this was simple: we didn't want to buy leads, and we didn't want to depend on ads. Here's why that matters for your bottom line.

	A bought lead	An inbound customer
Who started the conversation	You did, by interrupting them	They did, by asking a question and choosing you
Who else called them	Often several other businesses that bought the same lead	Usually no one. They called you.
What they know about you	Nothing yet	They've already read your answers and compared you
How ready they are	Curious, maybe	Researched and ready to talk
Cost over time	You pay for every lead, forever	You build an asset that keeps working and grows

When you buy a lead, you're renting attention. When you earn a recommendation, you're building something you own. People who find you through their own research are more likely to buy, because the research they did is what brought them to you.

That's the kind of customer any business wants: someone who already wants what you sell.

YOU'LL PAY EITHER WAY

Every business pays for growth one way or another. You pay in clients you never hear from, because they found someone else first. Or you invest in being found, and the clients you win pay that investment back. Only one of those comes back to you.

A FAIR WARNING

Inbound isn't instant. It builds. The early weeks are about foundation and content. The calls come as trust accumulates. That's why consistency matters more than any single tactic, and why a short burst of effort followed by silence rarely works.

CHAPTER 08

Scorecard: is your business ready to be recommended?

Answer honestly. Give yourself one point for each "yes."

1	Does your website look attractive and current, load quickly on a phone, and show this year's copyright date?	☐ YES ☐ NO
2	Can a customer book an appointment directly on your website, without filling out a form and waiting?	☐ YES ☐ NO
3	Does your website answer the specific questions customers ask before they buy, such as cost, process, timing, and eligibility?	☐ YES ☐ NO
4	Do you have a dedicated page for each core service you offer and each area you serve?	☐ YES ☐ NO
5	Have you published new, genuinely helpful content in the last 30 days?	☐ YES ☐ NO
6	Are your business name, address, phone number, services, logo, and look identical on your website, social media, and every listing?	☐ YES ☐ NO
7	Have you received new reviews in the last 90 days on the platforms your customers use?	☐ YES ☐ NO
8	Is your business mentioned on trusted websites in your industry, beyond your own site and social pages?	☐ YES ☐ NO
9	When you ask ChatGPT, Gemini, or Copilot, "Who's the best [your service] in [your city]?", does your business appear?	☐ YES ☐ NO
10	Is every call answered, including after hours and when your team is busy?	☐ YES ☐ NO

8–10 · Ready to scale

You've built the foundation. The opportunity now is consistency and reach.

5–7 · Visible in spots

You show up in some places and disappear in others. Your gaps are costing you calls.

0–4 · Invisible to AI

Customers are asking about what you do, and your competitors are getting those calls.

Tip for question 9: ask several different ways and on different days. One answer on one day doesn't tell you much. A pattern does.

CHAPTER 09

Seven questions to ask before you hire anyone

AI search is new, and a lot of people are selling it. These questions will separate the real thing from the sales pitch, including when you ask them of us.

1. **Have you done this for your own business?**
   Anyone can explain AEO. Ask who has actually lived it, with their own money and their own phone ringing.

2. **Can you show me the platform reports?**
   Ask for reports straight from the platforms, such as Google Search Console and Bing Webmaster Tools, not a slide with big numbers on it.

3. **How will you measure AI citations and mentions, and how often will I see them?**
   If they can't measure it, they can't manage it, and you can't hold them to it.

4. **What happens after the first month?**
   Visibility is built over months. Ask who keeps the content and optimization going, and how.

5. **How will you build trust beyond my website?**
   If the answer is only "we'll write blog posts," keep asking.

6. **Who owns the work if we part ways?**
   Your website and your content should belong to you.

7. **What do you need from me, and how much of my time?**
   The right partner should take work off your plate, not add to it.

CHAPTER 10

Why now: the infrastructure, and the opportunity

Two things made the difference for us. They're also why this matters for your business right now.

Trial and error got us traction. Infrastructure is what made it last.

Our first months were trial and error: try this, measure it, try that. But while we were testing, we were also building the infrastructure behind it, the systems that research, write, publish, measure, answer the phone, and follow up. Building it taught us what trial and error alone never would have: exactly what it takes, and what it costs, to keep a business growing.

It also showed us a hard truth. The way we started wasn't sustainable. I own an insurance agency and run it with a team of customer service agents. Nobody in that position can also run a visibility engine by hand and keep growing. The real fruit came once the systems were in place.

That's the part you get to skip. You don't start where we started. You start with the playbook we learned the hard way, running on technology built to scale, instead of spending your first months finding out what works.

The real question about cost

The question isn't only "what does it cost?" It's "how many new clients does it take to pay for itself each month?" For many businesses, that's a small number. Run your own numbers with the break-even calculator on our Discovery Call page. It uses your figures, not ours.

The blue ocean: owning your digital real estate

Almost everyone is still selling you ads, or a course on how to run ads. Almost no one is teaching business owners how to own their place in search and AI answers. That place is digital real estate: the spot where your business shows up when a customer asks a question.

And there are only so many spots. When a customer asks AI for a recommendation, it names a handful of businesses, not fifty. The ones that have spent months and years earning that trust are the ones that get the best clients. Everyone else rents attention from them, one ad and one lead at a time.

Right now most businesses aren't paying attention, and AI use isn't slowing down. In a year or two, you'll either be glad you started now or wish you had.

> Ads are rent. Visibility is ownership.

This isn't a "later" decision

Two employees or two thousand, the shift is the same. Only the stakes change.

	What's at stake	Where the opportunity is
Small business	You can't outspend bigger competitors on ads, and every call you miss hurts.	You can out-answer them. AI looks for the trusted local specialist, and the business that moves first can take that spot.
Growing business	You have a team and a budget, but likely not a system. While you stand still, competitors close the gap.	Turn what your team already knows into answers that bring in calls, without adding headcount to do it.
Enterprise and multi-location	AI already describes your brand. Is it getting your services, locations, and reputation right in every market?	Show up consistently everywhere you operate, so AI recommends you, not a regional competitor.

IF YOU'RE IN INSURANCE, THIS IS YOUR WAKE-UP CALL

Insurance runs on trust, and more and more buyers now research with AI before they ever call an agent. Many agencies are still buying leads and assuming AI is something to deal with later. It isn't later. It's now. The agencies that build their presence today will be the names AI gives tomorrow when someone asks who to call.

Put it in the budget

Treat visibility like rent or payroll: a line item, not an experiment for when things slow down. They won't. AI moves fast, and the businesses nimble enough to move with it are the ones that grow.

What falling behind looks like

It looks like a few fewer calls each quarter, ad costs that keep climbing, and customers who mention a competitor by name. By the time it's obvious, the best spots are taken. Businesses that adapt will survive and thrive. Businesses that wait will spend years trying to catch up.

> AI isn't coming later. It's already deciding who gets the call.

CHAPTER 11

What to do next

We know the problem because we lived it. We built the solution because we had to.

If you want to do it yourself

- Start with your website. Make it fast, current, and easy to book from.
- Work through every "no" on your scorecard, one at a time.
- Publish steadily and measure monthly. Budget the hours honestly; the time is the real cost.

If you'd rather focus on running your business and selling

You don't have to repeat our trial and error. We start by running your visibility report and walking you through it. Then we match you with the AI search visibility plan that fits and make the introduction. Our technology partner's team does the day-to-day work behind the scenes, and every quarter you review your progress, with us still part of the conversation.

Then we round it out with BreakPoint Systems services, like an AI receptionist and follow-up automation, that take work off your plate without hiring more people.

Book a Discovery Call

A free 30-minute call with me. We'll look at how your business shows up in Google and AI answers, where your calls are going to competitors, and your clearest first step, whether or not we work together.

AI search visibility plans start at $1,597/month with a 90-day initial term, billed monthly. Plans run on our technology partner's platform and are contracted under its agreement.

BOOK A CALL
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About the author. Billy Jordan Jr. has owned The Jordan Insurance Agency since 2006. When AI changed how customers look for help, he rebuilt how the agency gets found, then founded BreakPoint Systems to help other businesses do the same.

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