

Episode #317 – Using AI to Write Sales Emails in Under 3 Minutes

Hi there and welcome to another episode of Money Script Monday, your one stop shop for consumer and advisor friendly videos on financial education and empowerment. With a library of over 300 episodes that range on topics from life insurance to college planning and premium finance, you're likely to get great insights on topics that you can share with clients and that are easily customizable to your business. Before I get started, I want to remind you to please share this series with your friends and colleagues by having them go to lifepro.com/MSM and have them fill out the form to start getting new episodes sent to their inbox every single Monday. Again, that's lifepro.com/MSM.

Let's get into today's topic, which is using AI to write compelling sales emails in 3 minutes or less. Today we'll explore how cutting-edge AI tools are revolutionizing marketing in the financial sector, making your communication faster, smarter, and more effective. It's no surprise that the burst of artificial intelligence in the last year is altering how most industries function on a daily basis and the financial industry is no exception. According to a KPMG survey of financial services leaders, 84% said that AI is moderately to fully functional at their organization. It's becoming increasingly important, so without further ado, let's get into it.

First, we're going to be talking about AI and marketing. In the realm of marketing, AI is a game changer. We're talking about tools like ChatGPT that are capable of creating comprehensive, engaging content that includes tags, images, and even videos. But beyond just creating, it can also synthesize and summarize large amounts of data, potentially saving you hours of time in the brainstorming of new initiatives and the implementation of new strategies. This isn't just about time saving time, it's about enhancing the quality and relevance of your communications.

By integrating AI, you're able to provide personalized content that resonates with clients and also reduces operational costs. For a financial advisor, this means producing market updates, communicating product benefits, and other tailored recommendations with the level of precision and personalization that was previously unattainable at this speed. ChatGPT is the most common text generator out there and it's really easy to create an account. It's completely free for anyone to use to the public. All you have to do is go to chat.openai.com, hit that sign up button and you'll be able to get started using it right away. The interface is really simple, straightforward, easy to use, and you can build off of your previous prompts and sessions which makes it really easy for it to get to know you.

Next, we're going to be talking about AI working for you. One of the most time consuming parts of your job is putting that marketing hat on and being a content creator, getting information out to the world to promote your brand and your business. Whether that's in an e-mail blast newsletter, social media posts, welcome emails, scripts, paid advertisements or blog posts. The list goes on. They all can look very different, and it takes time to create content effectively and efficiently that can work across platforms.

Another example, let's say you're hosting events through our event marketing platform here at LifePro. You can use ChatGPT to write call scripts that can help you increase your attendance rates. After your event takes place, it can help you increase engagement in your follow-up campaigns by drafting up responses and specific, detailed answers to people's questions. In turn, you can make prospects feel more connected with your brand which can boost open rates, click through rates, engagement, and drive conversions. The uses here are endless.

If you do decide to make that leap into the world of ChatGPT, then here are some tips that you can follow to make the best use of this technology. Let's say you want ChatGPT to write sales copy about an upcoming product rate change that ties in messaging about annuities and

protected income. A prompt that I might start with is something like, "You are a professional copywriter that specializes in helping financial advisors create content for multiple platforms to strengthen SEO and boost searchability. You have been in the industry for over 20 years, and you specialize in writing copy for businesses in the finance sector. Write sales copy about an upcoming product rate change that ties in messaging about annuities."

It's helpful to give each session of ChatGPT an identity, background knowledge, and a clear objective. When I'm writing copy for Facebook ads and want to use ChatGPT's help for example, I'll tell it to create copy with the intent of increasing Facebook conversions. If the AI's response isn't what you're looking for, don't be afraid to rephrase your question, add more context, and provide clear instructions. Experimenting with different prompt styles may lead to better results. When you want the AI to follow a specific format or structure for example, you could provide examples that can be very helpful. It can give ChatGPT a better understanding of what you're looking for and how you want the information to be presented. Remember to always carefully review and revise any AI generated content and make sure it reflects your expertise and brand.

For more prompting tips and techniques, as well as a list of other useful AI tools, download the AI marketing cheat sheet pdf included at the bottom of this page. If you follow these best practices when getting started with using ChatGPT, you will be well on your way to using it to write sales emails in 3 minutes or less. Thank you so much for your time.