

How can Brokerage CEOs kill Monday morning blues using AI

Frustrations to Fun

TODAY

6:30 AM — THE INBOX

47 emails waiting

You scan for fires. Three need responses before you leave. One from your biggest client. One from a frustrated producer.

Your coffee gets cold.

8:00 AM — RENEWAL WEEKLY

Where is the tracker?

Someone updated it last week. Someone else has a different version. You spend 20 minutes finding the right spreadsheet.

Meeting runs 40 minutes over.

9:30 AM — NEW CLIENT QUOTE

Big prospect. Finally.

"Which policy should we go with?" Your best broker sighs. She opens both PDFs. Four hours of coverage review ahead.

You hope they wait.

11:00 AM — UNDERWRITING

Three apps waiting

Your underwriter is good. But she is buried. One application has been sitting for two days.

Nobody is happy.

MONDAY

6:30 AM

Inbox

Inbox

8:00 AM

Renewal Weekly

Renewal Weekly

9:30 AM

New client quote

New client quote

11:00 AM

Underwriting

Underwriting

WITH AI

6:30 AM — THE INBOX

AI EA worked overnight

47 emails came in. Three are flagged urgent. Draft responses ready. You review, edit one, hit send on all three.

Your coffee is still hot.

8:00 AM — RENEWAL WEEKLY

Tracker is current

AI Renewal Manager updated it this morning. Every renewal for the next 60 days, sorted by priority. You review exceptions.

Meeting ends 15 minutes early.

9:30 AM — NEW CLIENT QUOTE

Big prospect. Ready.

AI Broker already did the analysis. Side-by-side comparison. Key differences highlighted. Your broker reviews, adds judgment, sends.

30 minutes. Prospect impressed.

11:00 AM — UNDERWRITING

Three apps. Done.

AI Underwriter pre-assessed risk, flagged issues, drafted recommendations. Your underwriter reviews. Agrees with two, adjusts one.

All three approved by lunch.

1:00 PM — LUNCH?

Sandwich at desk

You cancelled lunch with a friend. You are catching up on COI requests that should have gone out yesterday.

This is not CEO work.

1:00 PM

Lunch?

Lunch

1:00 PM — LUNCH

Actual lunch. Outside.

The COIs went out this morning. AI Renewal Manager handled them. Your account manager is working on relationships, not paperwork.

You do not check your phone.

3:00 PM — RENEWAL FIRE

Client calls. Angry.

Their renewal was missed. Policy lapsed. They found out from their bank. You apologize. Your team scrambles.

This should not happen. Again.

3:00 PM

Renewal Fire

Strategy

3:00 PM — NO FIRE

Phone does not ring

The renewal that would have been missed? AI flagged it two weeks ago. It was handled. The client never knew.

You work on strategy instead.

5:30 PM — STILL HERE

Kid has a game at 6

You planned to leave at 5. You are still here. Still answering emails. Still putting out fires.

"Running late. Start without me."

5:30 PM

Still Here

Heading Out

4:30 PM — HEADING OUT

Tomorrow is prepped

AI EA has tomorrow's meetings ready. Agendas set. Background docs prepared. You close your laptop. You grab your keys.

You make the whole game.

Today

Tired.
Reactive.
Always behind.

With AI

Present.
Strategic.
Actually leading.

Same company. Same team. Same clients. Different day.

Insurance CEOs are getting 30x ROI in 30 days

Book a Call

30 minutes. Your day, your pain points, what is possible.

Plumcot

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