FREE TRADE PLAYBOOK

Insurance & Financial Advisors: the top time-savers

~18
hours a week
top claim

6 AI tools that can take busywork off insurance agents and financial advisors. What each one does, what it costs, how to start, and where we got the facts.

Built from 13 insurance agents and financial advisors listings in the BusyWorkBots directory, as of November 1, 2026. 3 of them show a sourced hours number.

#	Tool	What it does	Hours saved	Price	Setup
1	**Carrier Follow-Up Agent** Email follow-up	Sends quotes to carriers, follows up on its own, and sorts the replies.	~18 hours a week (vendor claim)	Check site	Easy
2	**Advisor Meeting Notes Bot** Email follow-up	Takes client meeting notes, writes the follow-up email, and updates your CRM.	20–25 hours a week across 4 advisors (vendor claim)	From $100/advisor/mo	Easy
3	**Quote Comparison Helper** Other busywork	Compares commercial quotes and policies and builds proposals much faster.	~2 hours, period not stated (vendor claim)	From $1,000/seat/yr	Easy
4	**Agency Call Answerer** Answering calls	AI answers agency calls and types quote details in while you talk.	Not stated	Check site	Easy
5	**Agency How-To Coach** Training	Answers staff how-to questions inside AMS360 or Sagitta, with the source.	Not stated	Check site	Easy
6	**AgencyZoom** Follow-up	Sales pipeline and auto follow-up for insurance agencies.	Not stated	Essential $149/mo	Easy

How we picked these 6. We take up to 3 listings that have a sourced hours number, biggest first. Then one listing per chore, easiest setup first. We make sure you see both free DIY templates and software when the trade has both. We do not test every tool.

How to read hours. Hours are the numbers the maker, an owner, or a case study gave. The source is on each card. “Not stated” means we have no sourced number, so we do not guess one.

How to read price. Price comes from each listing. “Check site” means we could not find a public price. Always confirm on the maker’s site.

TOOLS 1–3 OF 6

1 Carrier Follow-Up Agent

Email follow-up | Setup: Easy | Software or service

What it does Sends quotes to carriers, follows up on its own, and sorts the replies.

Good if Chasing carriers for quotes all day?

Hours saved ~18 hours a week Vendor claim; the maker's own estimate.

Price **Check site**

Setup Book a demo and start with carrier follow-ups only.

Source: usehandle.ai/en/case-studies/brove Our page: busyworkbots.com/bots/carrier-follow-up-agent/

2 Advisor Meeting Notes Bot

Email follow-up | Setup: Easy | Software or service

What it does Takes client meeting notes, writes the follow-up email, and updates your CRM.

Good if Writing up notes after every meeting?

Hours saved 20–25 hours a week across 4 advisors Vendor claim.

Price **From $100/advisor/mo** (Meet plan)

Setup Connect your calendar and CRM, turn it on for your next meeting, and check the notes.

Source: jump.ai/case-study/anthony-petsis-and-associates
Our page: busyworkbots.com/bots/advisor-meeting-notes-bot/

3 Quote Comparison Helper

Other busywork | Setup: Easy | Software or service

What it does Compares commercial quotes and policies and builds proposals much faster.

Good if Hours spent comparing quotes?

Hours saved ~2 hours Customer's own math, vendor case study) (maker's claim). Check the source for the time period.

Price **From $1,000/seat/yr**

Setup Book a demo and try it on quote comparisons first.

Source: outmarket.ai/blog/commercial-insurance-associates-case-study
Our page: busyworkbots.com/bots/quote-comparison-helper/

TOOLS 4–6 OF 6

4 Agency Call Answerer

Answering calls | Setup: Easy | Software or service

What it does AI answers agency calls and types quote details in while you talk.
Good if Phones ringing with no one free?
Hours saved Not stated
Price **Check site**
Setup Start with the live call agent on one line, then add quoting.

Source: getsuperagent.com/case-study-stieber-insurance
Our page: busyworkbots.com/bots/agency-call-answerer/

5 Agency How-To Coach

Training | Setup: Easy | Software or service

What it does Answers staff how-to questions inside AMS360 or Sagitta, with the source.
Good if New staff stuck asking coworkers how to do every task?
Hours saved Not stated
Price **Check site** (Vertafore AgencyOne customers)
Setup
1. Ask your Vertafore rep to turn on Coach Agent in AgencyOne with AMS360 or Sagitta.
2. Upload your agency's SOPs so answers match how you do things.
3. Have new hires ask it first before asking a coworker.
4. Spot-check answers and fix any SOP that's out of date.

Source: prnewswire.com Our page: busyworkbots.com/bots/agency-how-to-coach/

6 AgencyZoom

Follow-up | Setup: Easy | Software or service

What it does Sales pipeline and auto follow-up for insurance agencies.
Good if Leads and renewals slipping?
Hours saved Not stated
Price **Essential $149/mo**
Setup
1. Book a demo or trial.
2. Connect your agency system.
3. Turn on a lead cadence.

Source: agencyzoom.com/pricing Our page: busyworkbots.com/bots/agencyzoom/

START HERE

Your first 7 days

You do not need all 6 tools. Pick one chore, try one tool, and count the hours before and after.

Day 1	**Count your chores.** Write down the 3 chores that eat the most time. Next to each, write the hours it takes in a normal week. This is your starting line.
Day 2	**Pick one tool.** Start with just one. On this list, Carrier Follow-Up Agent is the easiest to set up (setup: Easy). Pick the one that fits your biggest chore, not the one with the biggest hours number.
Day 3	**Check price and claims.** Open the source link on the tool's card. Ask the maker for the price in writing. Remember: hours saved are the maker's or owner's numbers, not ours.
Day 4	**Try it small.** Use it on a few real jobs only. If it writes messages, read every one before it goes out.
Day 5	**Fix the words.** Change anything that does not sound like you. Write down every mistake it made.
Day 6	**Run it for a normal day.** Keep a person ready to step in. Note how long the chore took this time.
Day 7	**Count again.** Compare to Day 1. Keep it, change it, or drop it. Then pick your next chore.

Test it before you buy it. Free one-page kits with questions to ask the maker, a test script, and a 7-day trial plan:

- AI receptionist kit busyworkbots.com/test-kits/ai-receptionist/
- Quote follow-up kit busyworkbots.com/test-kits/quote-follow-up/
- AI meeting notes kit busyworkbots.com/test-kits/meeting-notes/

How to count your hours: for one normal week, write down each time you do the chore and how many minutes it took. Add them up.

NEXT STEP

Not sure where to start? We can help.

Free Busywork Audit

Pick your industry and the chores that eat your week. Get a one-page report of tools from our directory, with the hours each listing reports. Free. No email needed.

Take the free audit →

https://busyworkbots.com/free-audit/

Want it set up for you?

TimeGentic runs BusyWorkBots. Book a Free Profit Leak Check and we will look at where your business loses time and money.

Book Free Profit Leak Check →

https://timegentic.ai

Heads up: TimeGentic LLC runs BusyWorkBots, so the Profit Leak Check is our own service. Some links on busyworkbots.com are affiliate links; the links in this PDF go to each maker's own pages. We do not test every tool, and hours saved are the numbers given by each source. Prices change, so check the maker's site.

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