



Agency AI Labs

BROUGHT TO YOU BY



AI, E&O & COMMERCIAL CLIENT RISK | AGENCY HANDOUT

CLIENT DISCOVERY CONVERSATION GUIDE: HOW YOUR BUSINESS IS CHANGING

Opening: "Tell me about your business. I like to check how businesses are changing the way they work, because new tools and automation can change what your coverage needs to look like. Mind if I ask a few quick questions?"

Developed by Fall Line Specialty, an ACT Supporting Partner, as part of Agency AI Labs

HOW DOES YOUR BUSINESS RUN DAY TO DAY?

1. Have you added any new software or automated tools in the last year to save time or cut costs? What has been the most helpful?
2. Where in the business are those tools helping most: marketing, customer questions, bookkeeping, hiring, scheduling, operations?
3. Are you or your team using things like ChatGPT or similar assistants to write, research, or answer customers? Do you pay for those tools, or is it more informal?
4. Anything on the horizon in the next year or two that you are thinking of automating or handing off to technology?

HOW DO THESE NEW TOOLS IMPACT YOUR CUSTOMERS & YOUR TEAM?

5. Does any software or automated system help make decisions about customers, such as who qualifies, pricing, approvals, hiring, or tenant screening?
6. Do any tools you use play a part in anything safety-related, like equipment, vehicles, building systems, or health or treatment decisions?
7. When customers contact you, are they ever dealing with an automated chat or phone system, or is it always a person?
8. What kind of customer or employee information goes into these tools: personal details, health or financial information, contracts, anything confidential?

DID YOU BUILD OR BUY THESE TOOLS?

9. Did you buy these tools off the shelf, have a vendor set them up, or did someone on your team build or customize them?
10. If one of those tools gave a wrong answer or went down, who would catch it, and how would you find out?
11. Have you looked at your agreements with those software providers? Do they say anything about who is responsible if the tool gets something wrong?

WHO'S IN CHARGE (OF YOUR OPERATIONS, TOOL PURCHASES) & KEEPS AN EYE ON THINGS?

12. Does anyone keep track of which tools and apps your team is using, or does each person pick their own?
13. Do you have any written guidelines for staff on what they can and cannot put into these tools, or has it been more word of mouth?
14. If a tool caused a problem, like a wrong answer to a customer, a data mix-up, or something that got you bad press, do you have a plan for who handles it?

Close with: "Thanks, that gives me a good picture. I will look at how this fits with your current coverage and come back with any suggestions before renewal."