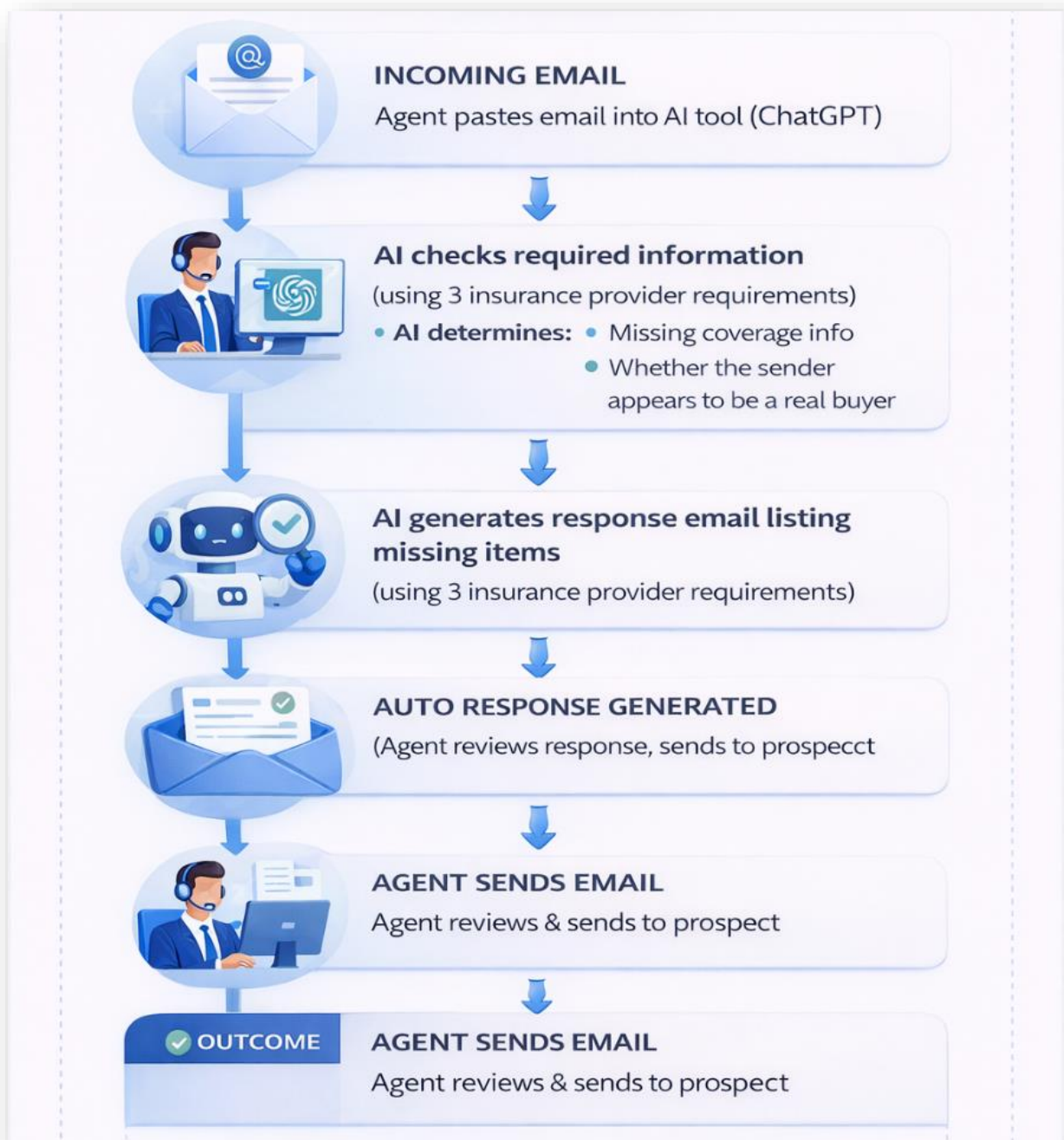


Zinser Insurance – Automation Playbook (Sample)

Automation 1: [Universal Lead Screening Intake \(Email\)](#)



What Is It?

The Lead Screening Intake Automation helps automate your email leads so you can immediately triage and score the lead's viability. **Output includes:**

- **Lead score** (out of 10) based on viability as a client
- **Pre-drafted email**, written out in your voice for you and ready to copy/paste.

Who Can Use It?

Any employee addressing cold leads can use this tool.

How Do We Use It?

Step 1: Access Chat GPT and your email account. Use 2 separate tabs or windows for ease.

Step 2: Inside of Chat GPT, access the GPT on the left, titled "Zinser - Universal Lead Screening Intake (Email)"

Step 3: Open a new email, identifying itself as a potential lead.

Step 4: Copy and paste the entire email (or email thread) into the "Zinser – Universal Lead Screening Intake (Email)" GPT.

Step 5: Confirm lead score, and copy/paste email response directly into the reply and send.

The Numbers (Per Year)

-*NOTE: Based on 1.5 leads per day // 30min per lead manual processing // \$25/hr Salary

-Companies responding within 1 hour are 7x more likely to qualify leads -[Harvard Business Review Lead Response Study](#)

+3 Full Work
Weeks Saved

+\$3,250 Saved
(Salary)

+20% Leads
Recovered