



AI ROLEPLAY & COACHING | INSURANCE

# Simplify messaging, earn trust, and build long-term relationships

Hi, this is Priya

Hi Priya, this is Sophia from Insurance National



## Transform agent performance and compliance

Insurance customers are overwhelmed by jargon and comparing quotes from multiple carriers. Agents who cannot break down complex products into clear, compliant language lose the customer to someone who can. FunnelX provides insurance teams a way to practice the exact customer scenarios they face whether it's new policy conversations or renewals. And we use your own products, compliance requirements, and sales process. The result is clear communication, reduced E&O risk, and agents who earn customer trust.

## Why FunnelX

- 1 Build trust and determine needs**  
Practicing customer needs discovery builds trust and shows understanding for a consultative and valued relationship sale.
- 2 Simplify complex insurance products**  
Let agents practice explaining coverages, exclusions, and terms in language customers actually understand.
- 3 Practice proven and compliant messaging**  
Agents practice using approved language and proper terminology to build trust and avoid mistakes that lead to errors, omissions, and customer disputes.

## HIGHLIGHTS



### Live AI roleplay

Help agents practice reframing "I got a cheaper quote" into a conversation about coverage value and risk exposure.



### Live AI coaching

Guide agents on conducting annual reviews that uncover life changes, coverage gaps, and cross-sell opportunities.



### Sales analytics

Measure coaching impact over time using 30/60/90 snapshots to show whether agents are improving.



### Faster onboarding

Bridge the gap between certification and conversation by giving agents a safe space to practice what they've learned.

# AI-powered training features built to clarify communication and ensure compliance

FunnelX delivers the features that help your insurance agents communicate clearly, stay compliant, and earn customer trust.

## Persona-based simulations

Practice conversations with first-time buyers, renewal customers, price shoppers, and commercial prospects using scenarios built around your products and markets.

## Live coaching & feedback

Coaching prompts during simulations and live calls help agents stay compliant, simplify product explanations, and communicate with confidence.

## Daily practice sessions

Short daily warm-ups keep agents sharp on product explanations, compliance language, and objection handling before they talk to customers.

## Compliance-aware coaching

Agents practice using approved terminology, required disclosures, and proper product descriptions so compliant communication becomes automatic.

## Recreate real insurance scenarios

Define your product details, compliance requirements, and sales playbooks so agents practice the exact conversations they have with customers every day.

## Leaderboards & performance tracking

Drive engagement with friendly competition, agent rankings, certifications, and performance reports that keep your team motivated to practice and improve.

## Ready to give your customers the clarity and protection they deserve?

roleplay and coaching prepare your agents to simplify complex products and communicate with confidence.

Contact us at [sales@funnelx.ai](mailto:sales@funnelx.ai) to book a demo

