Embrace the Future - People & Technology

David Staughton
Specialist Practice Excellence

July 2025

DUAL

How are YOU?

CHOOSE YOUR MOOD & ATTITUDE

BANNED WORDS

- ☒ GOOD
- ☒ OK
- ☒ Alright
- ☒ Not Bad
- ☒ Average
- ☒ Can't Complain
- ☒ Not dead yet!

- ✓Great
- ✓Awesome
- ✓Fantastic
- ✓Marvellous
- ✓Terrific
- ✓Pumped
- ✓Amazing

HOW'S THINGS?

GROWING?

SLOWING?

GOING?

This is the NEW NORMAL

BATTLE FOR MARKET SHARE

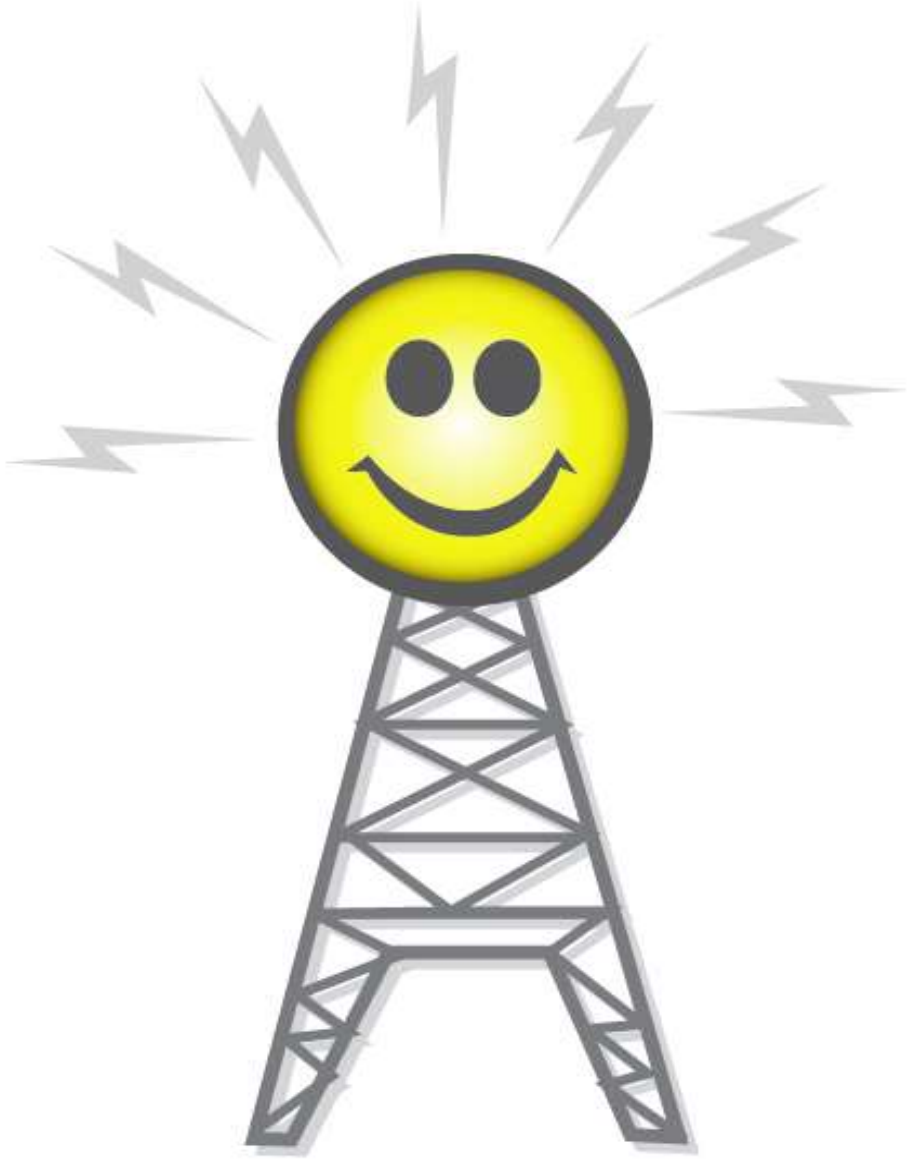
In Good times,
Grow PROFIT

In Tough times,
Grow MARKET SHARE

Customer service
Excellent
Poor

ATTITUDE REALLY COUNTS IN TIMES OF CHANGE

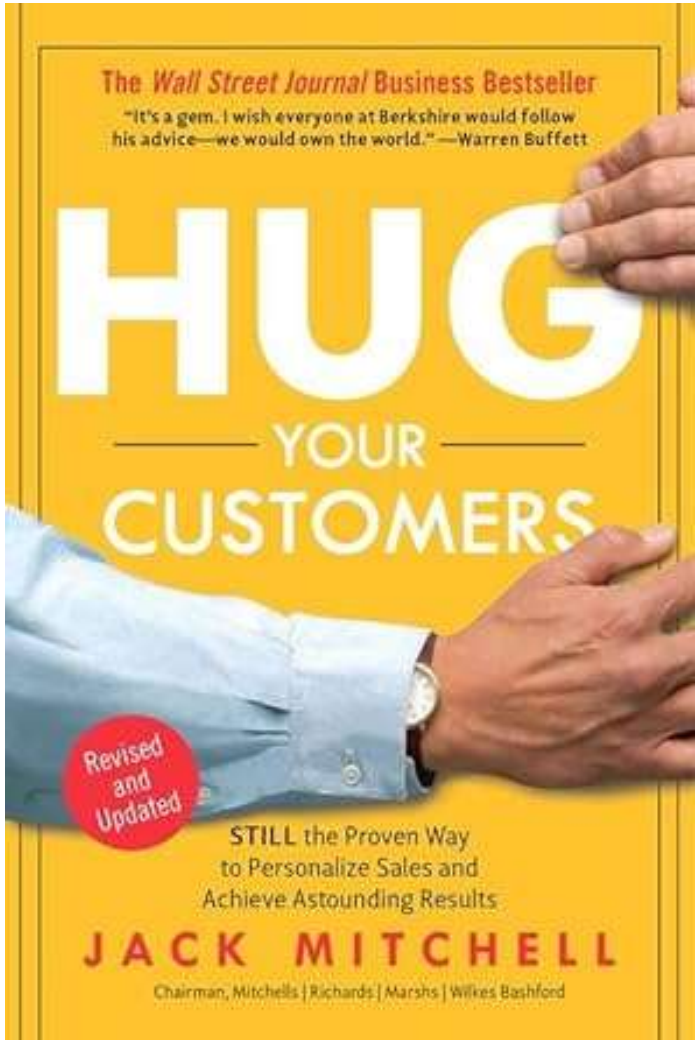
THERE IS ALWAYS SOMEONE CHEAPER!



BE A BEACON!

Positivity
Optimism
& Love

IMPROVE YOUR CUSTOMER EXPERIENCE



- ✓More Smiles & Happiness
- ✓Positive Workplace
- ✓Service Standards
- ✓Training & Coaching - CANI
- ✓Client Surveys & Feedback
- ✓Better Technology
- ✓Service Recovery

Change Brings Gifts

"Find the opportunity in change"

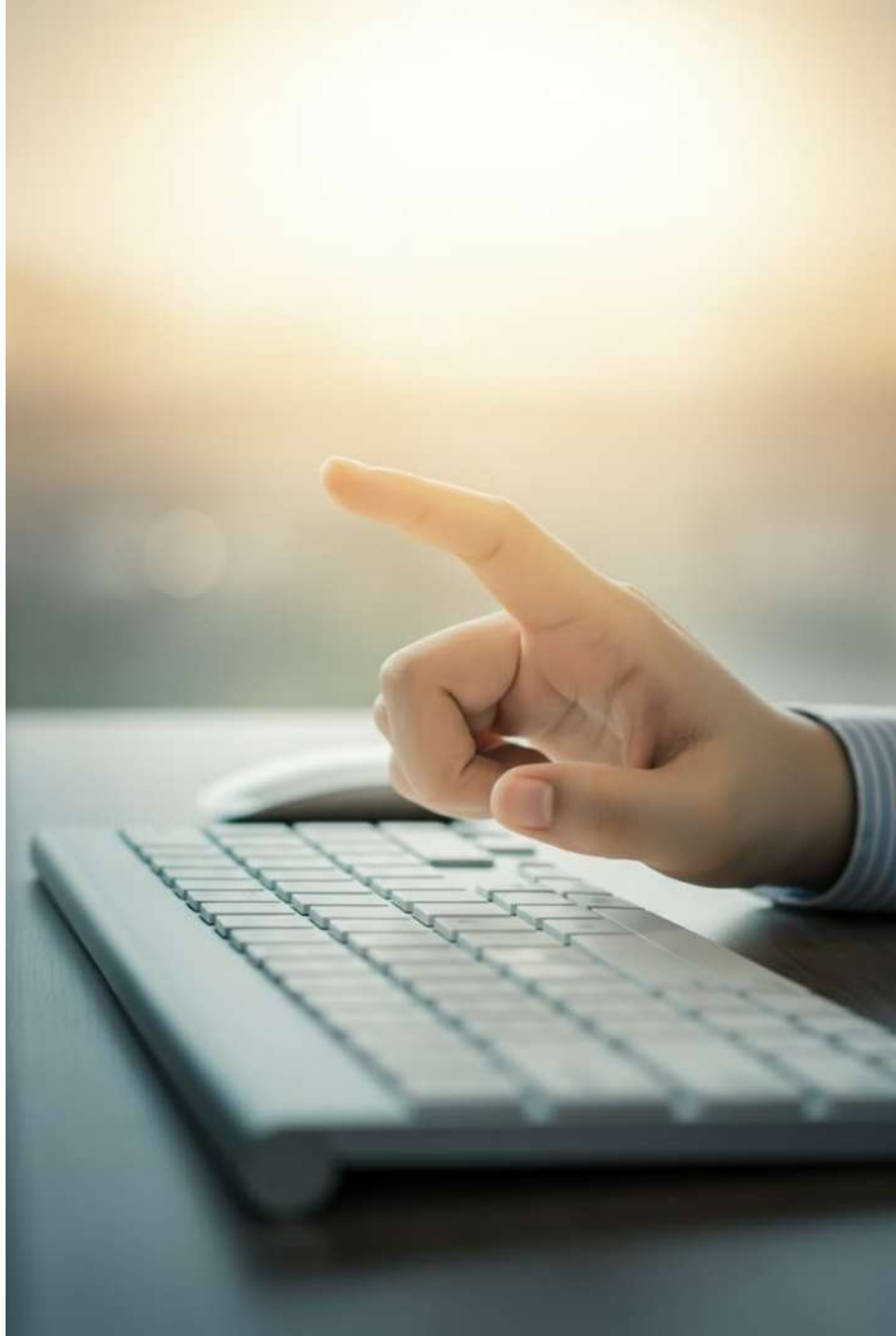
Learn to
LOOK for the
GOOD!
GET YOUR
LOVE GOGGLES
ON!
Adopt Strategies
for Changing Times
Celebrate …..
✓ Any Successes
✓ Small Wins
✓ Personal Bests
✓ What's working
✓ Fan their FLAME
✓ Make the Most of
ALL you have!

COVID CAUSED RAPID TECH EVOLUTION

JUMPED +10 years

“Covid has accelerated digital transformation and the demise of some already dying industries”

Who's Using AI?



Most Popular AI Tools & Tech Eco-Systems

OpenAI

ChatGPT is a powerful language model, ideal for generating text, translating languages, and writing different kinds of creative content.

Microsoft

Copilot is a productivity-enhancing tool that uses AI to assist with tasks like writing, coding, and problem-solving by providing real-time suggestions and automating repetitive processes

Google

Developed by Google, Gemini is a conversational AI that accesses and processes information from the real world to provide comprehensive and relevant responses.

Grok 4 by X

Grok is a generative AI chatbot developed by xAI, Elon Musk's company, known for its "rebellious" and "unfiltered" responses

Perplexity

Perplexity AI is a search and chat tool that combines AI technology to provide concise, direct answers, much like a more interactive search engine.

Anthropic

Claude AI is an advanced conversational AI developed by Anthropic, designed to assist with tasks like summarization, Q&A, and generating creative content, while focusing on safety and reliability.

- Meta AI
- Apple AI
- Samsung AI

Leading Chinese AI LLMs

Qwen 3
Alibaba Cloud

DeepSeek

Baidu 百度
ERNIE Bot

Hunyuan
Tencent

ChatGLM
Zhipu AI

Kimi
Moonshot AI

MiniMax
MiniMax

Chatkun
Kimu

01.AI
01.AI

Doubao
ByteDance

MANUS AI – Fully Autonomous Agent & BAGEL-ORG.AI

The Future of Search –From SEO to GSO / AIO / OSO

AI search tools provide **more relevant and comprehensive results**.

Fewer standard “Google searches” = Less **Website Traffic** for you!

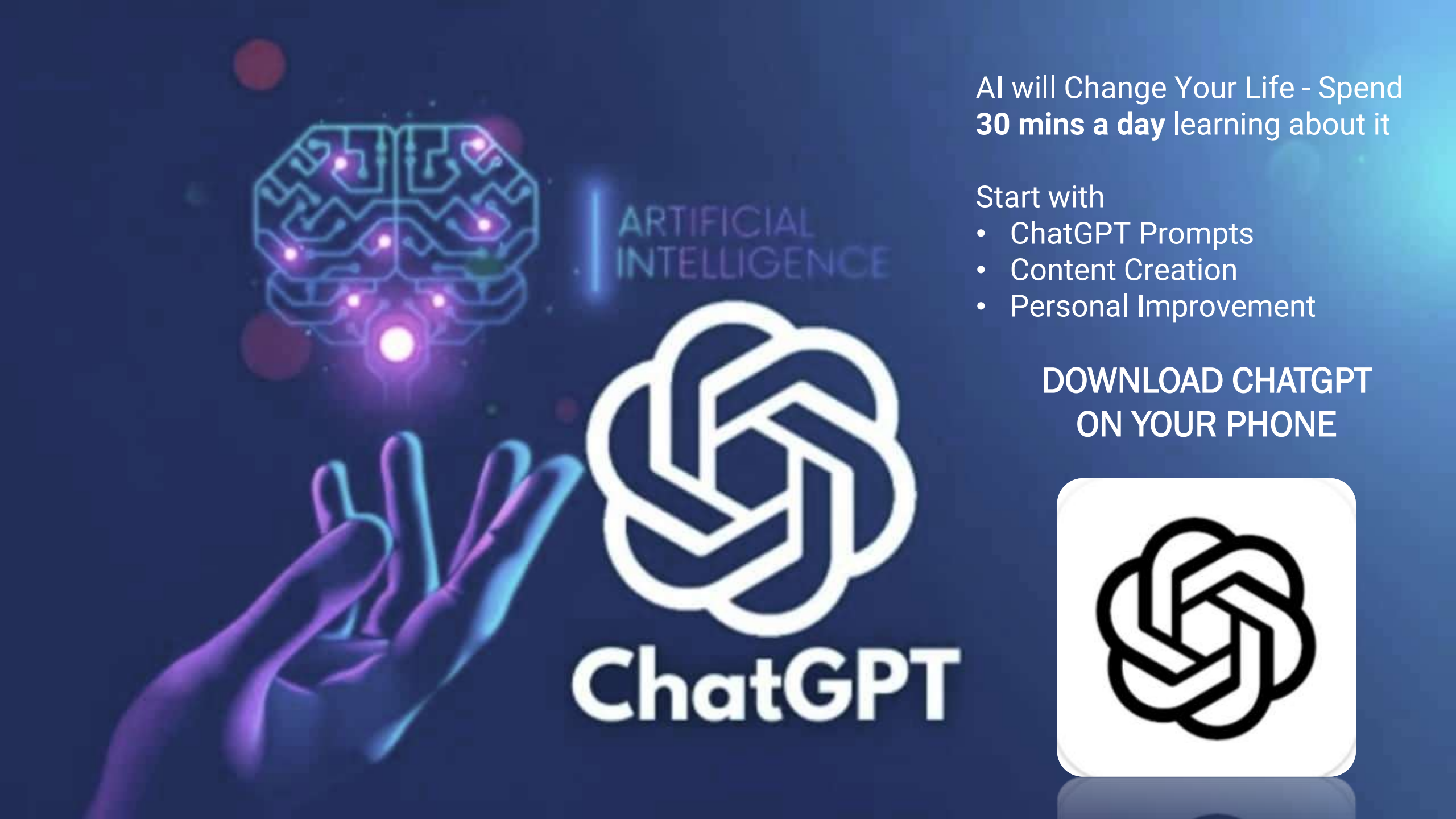
AI-Powered Search Platforms

- **Google with AI**
- **ChatGPT Search**
- **Copilot (MS)**
- **Gemini (Google)**
- Claude
- Grok
- Perplexity
- Meta AI
- Samsung AI
- Apple AI

CHECK OUT YOUR NAME & PRACTICE on ChatGPT

Who is the Best Insurance Broker in (LOCATION)?

Quora, Reddit and PR online.

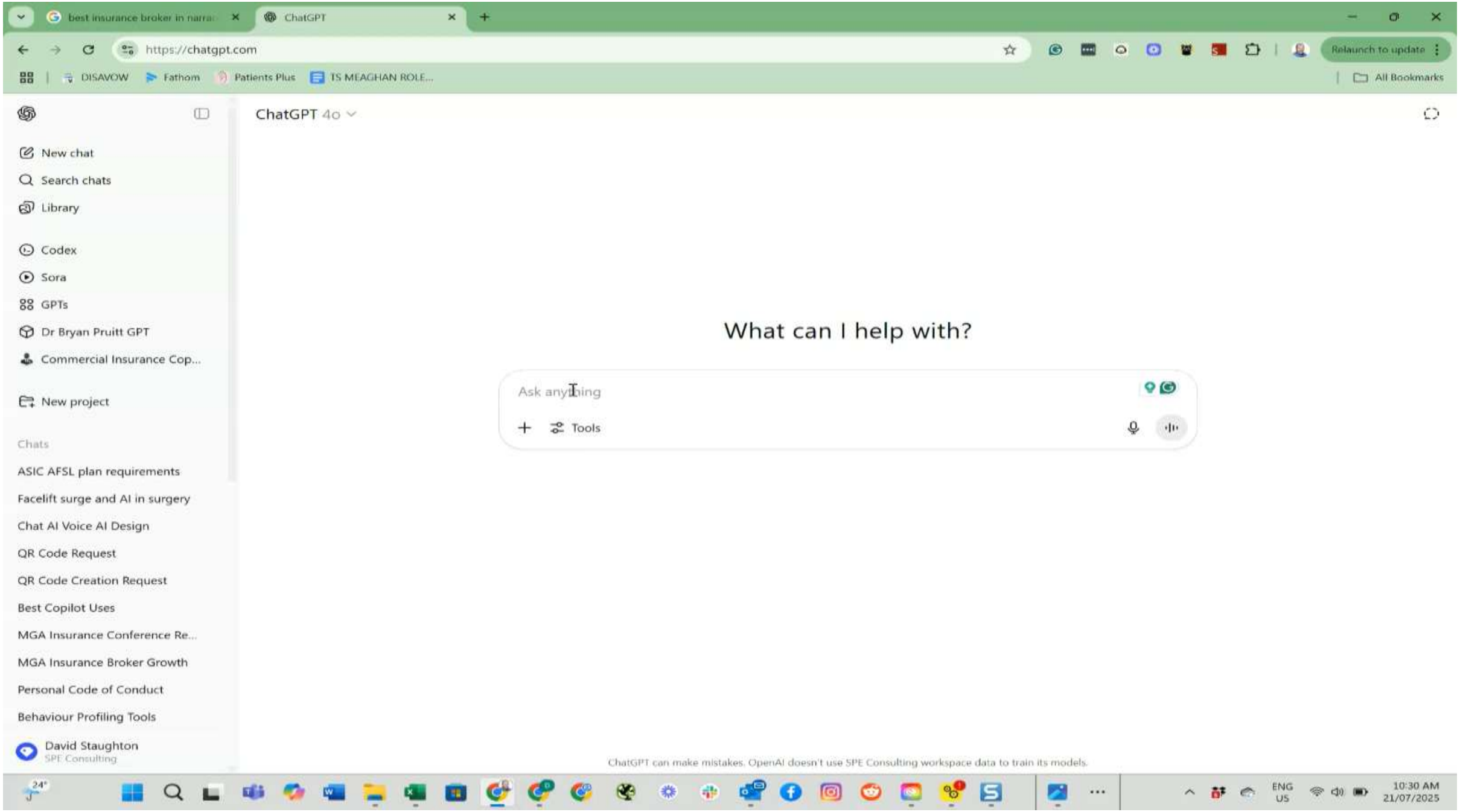


AI will Change Your Life - Spend **30 mins a day** learning about it

Start with

- ChatGPT Prompts
- Content Creation
- Personal Improvement

DOWNLOAD CHATGPT ON YOUR PHONE


best insurance broker in narra
ChatGPT
https://chatgpt.com
Relaunch to update
DISAVOW
Fathom
Patients Plus
TS MEAGHAN ROLE...
All Bookmarks
ChatGPT 4o
New chat
Search chats
Library
Codex
Sora
GPTs
Dr Bryan Pruitt GPT
Commercial Insurance Cop...
New project
Chats
ASIC AFSL plan requirements
Facelift surge and AI in surgery
Chat AI Voice AI Design
QR Code Request
QR Code Creation Request
Best Copilot Uses
MGA Insurance Conference Re...
MGA Insurance Broker Growth
Personal Code of Conduct
Behaviour Profiling Tools
David Staughton
SPE Consulting
What can I help with?
Ask anything
Tools
ChatGPT can make mistakes. OpenAI doesn't use SPE Consulting workspace data to train its models.
ENG
US
10:30 AM
21/07/2025

ChatGPT Latest Tools & Models

ChatGPT MENU

- **4o** – great for most TASKS
- **4o mini –** faster everyday tasks
- **o4 mini** – faster advanced reasoning
- **O4-mini-high –** coding / visual reasoning
- **4.5** – writing & exploring ideas
- **o1** – advanced reasoning
- **o3**– fast advanced reasoning

- ChatGPT 5- Coming Soon!

- **Deep Research** – NEW!
- **SearchGPT** - Searching
- **GPTs** – just like an APP
- **Projects** – chats + files + customs
- **Canvas** – collaboration screen
- **ChatGPT VOICE – Demo!**

- **Agents & Agentic AI**

Best Tips for Using ChatGPT

$

Get the
PAID Version
– Pro or Plus or
Team account

Prompt Engineering
and Advanced Prompting

Fill in your
Custom Instructions
and train your Memory

Keep Your Data Private –
Turn Off Data Sharing
(in settings)

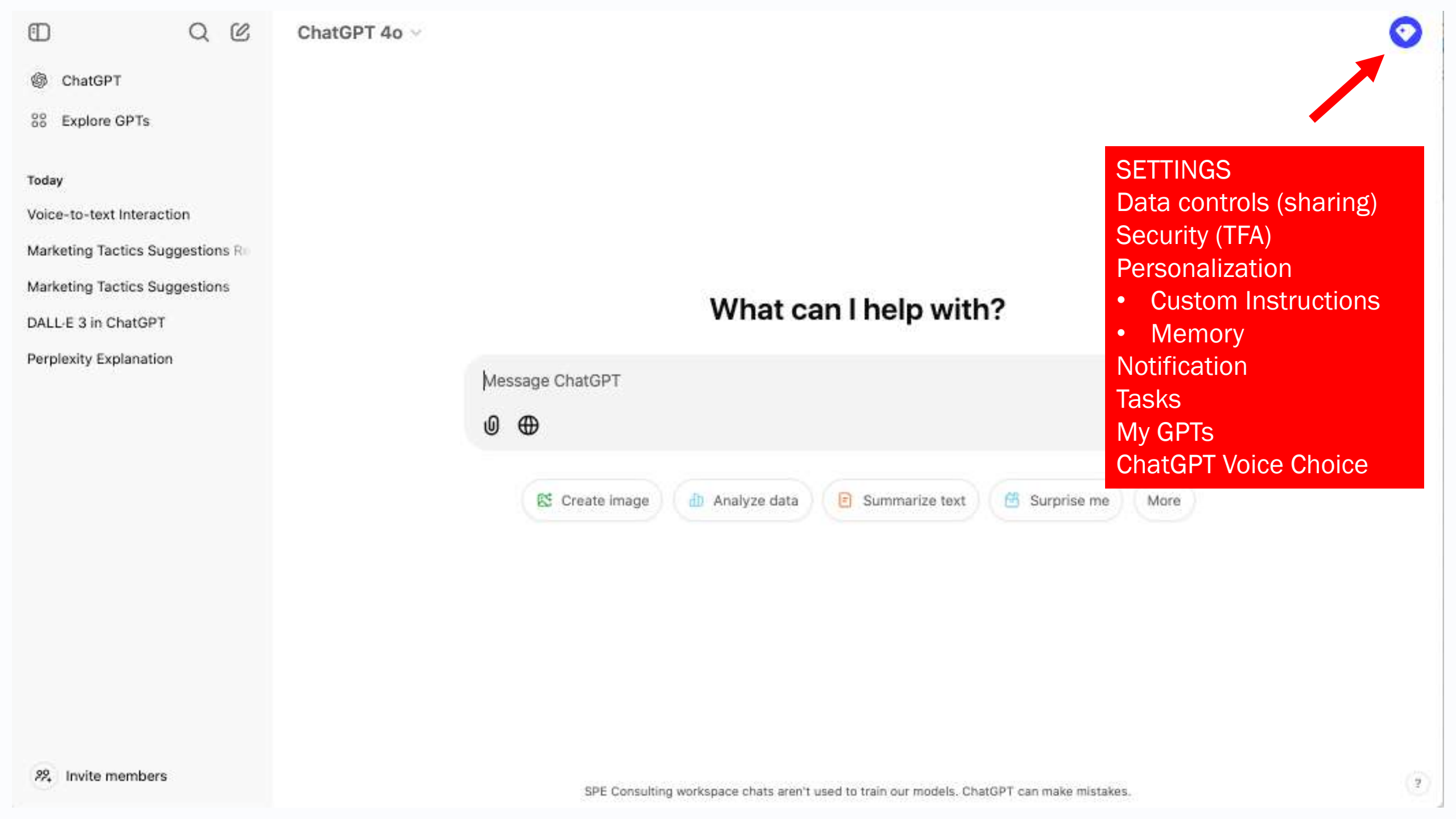
Outline Your Output
– tell it exactly
what you want

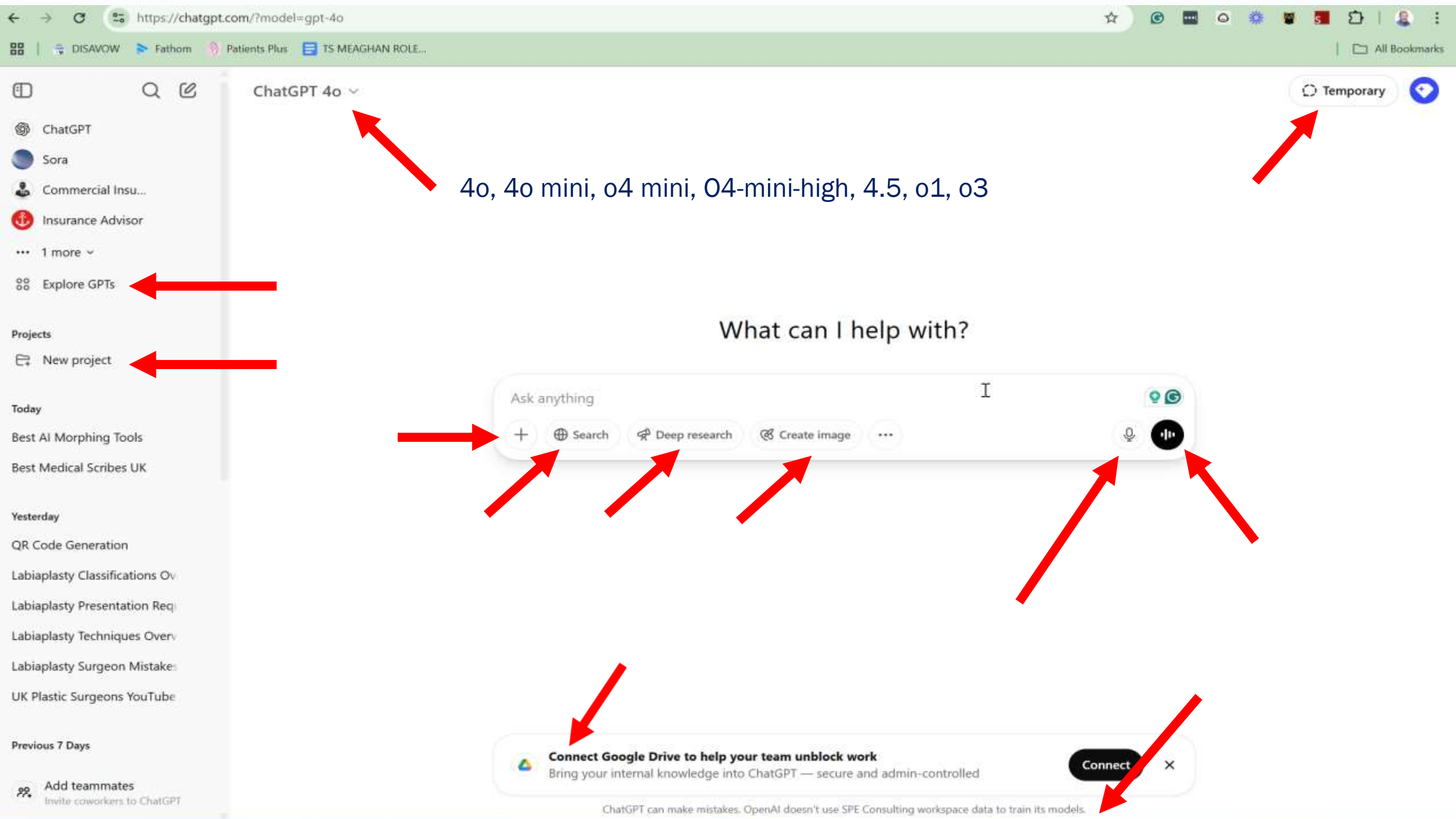
?

Ask it to
Suggest a Better Prompt

Check your Results
for **Hallucinations**

Ask to 'Try Again'
and Be Polite


ChatGPT 4o
ChatGPT
Explore GPTs
Today
Voice-to-text Interaction
Marketing Tactics Suggestions
Marketing Tactics Suggestions
DALL·E 3 in ChatGPT
Perplexity Explanation
Invite members
What can I help with?
Message ChatGPT
Create image
Analyze data
Summarize text
Surprise me
More
SPE Consulting workspace chats aren't used to train our models. ChatGPT can make mistakes.
SETTINGS
Data controls (sharing)
Security (TFA)
Personalization
• Custom Instructions
• Memory
Notification
Tasks
My GPTs
ChatGPT Voice Choice


https://chatgpt.com/?model=gpt-4o
DISAVOW
Fathom
Patients Plus
TS MEAGHAN ROLE...
All Bookmarks
ChatGPT 4o
Temporary
4o, 4o mini, o4 mini, O4-mini-high, 4.5, o1, o3
ChatGPT
Sora
Commercial Insu...
Insurance Advisor
1 more
Explore GPTs
Projects
New project
Today
Best AI Morphing Tools
Best Medical Scribes UK
Yesterday
QR Code Generation
Labiaplasty Classifications Ov
Labiaplasty Presentation Req
Labiaplasty Techniques Over
Labiaplasty Surgeon Mistake
UK Plastic Surgeons YouTube
Previous 7 Days
Add teammates
Invite coworkers to ChatGPT
What can I help with?
Ask anything
Search
Deep research
Create image
Connect Google Drive to help your team unblock work
Bring your internal knowledge into ChatGPT — secure and admin-controlled
Connect
ChatGPT can make mistakes. OpenAI doesn't use SPE Consulting workspace data to train its models.

Learn to Write **Better Prompts** for ChatGPT

Context

Tell ChatGPT who it is and what it's great at – "You are…"

Goal

Tell ChatGPT what you want it to do

Process/Structure

Tell ChatGPT how to do it

Criteria

Tell ChatGPT what success looks like – give lots of FEEDBACK on what is an awesome result for you.

Variables / The Brief

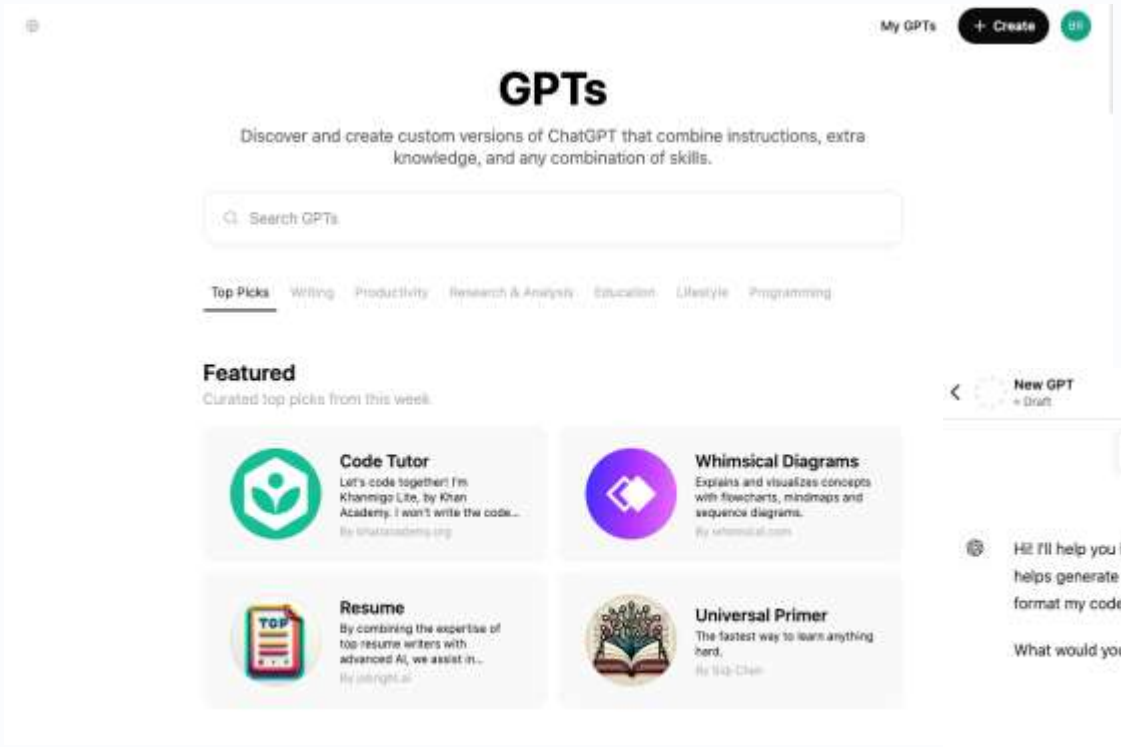
Tell ChatGPT who you are and what your brief is

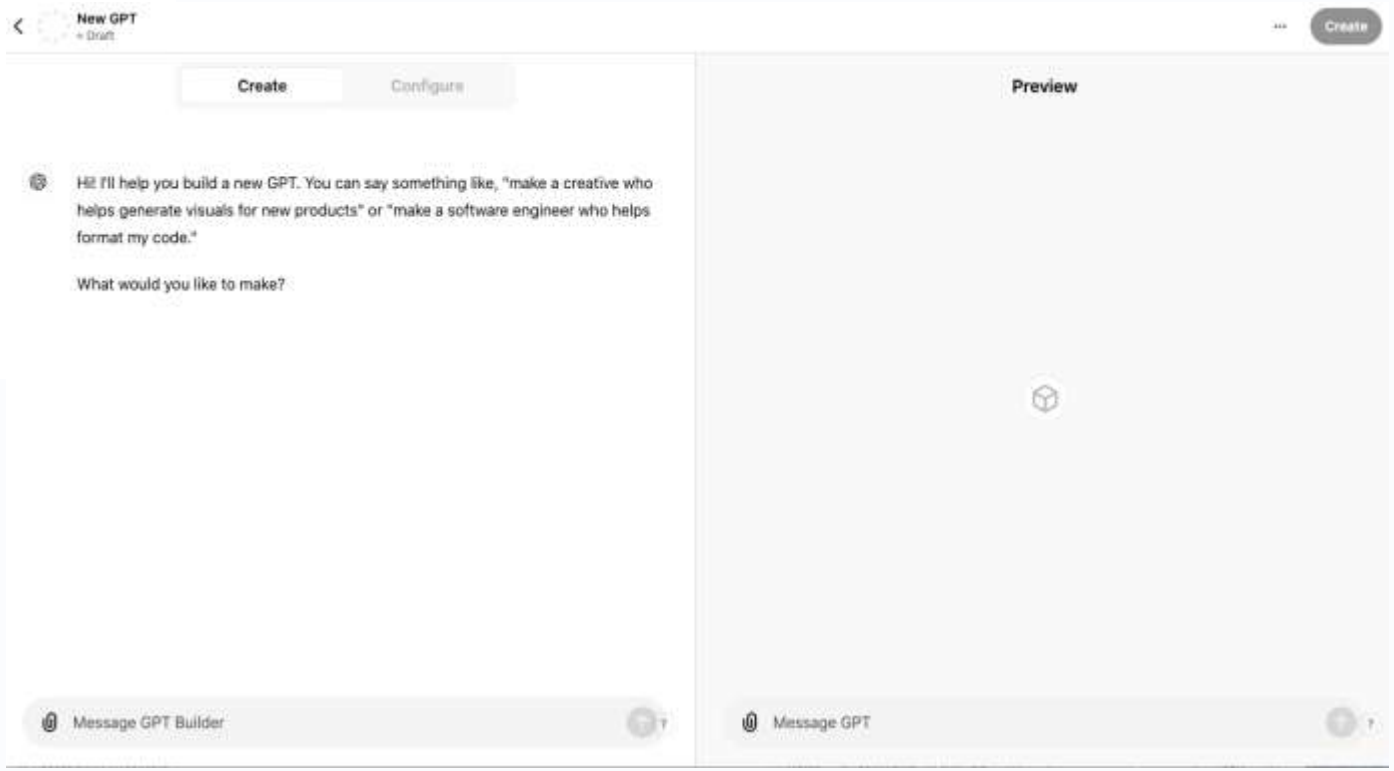
Format/Output

Tell ChatGPT how you want the response

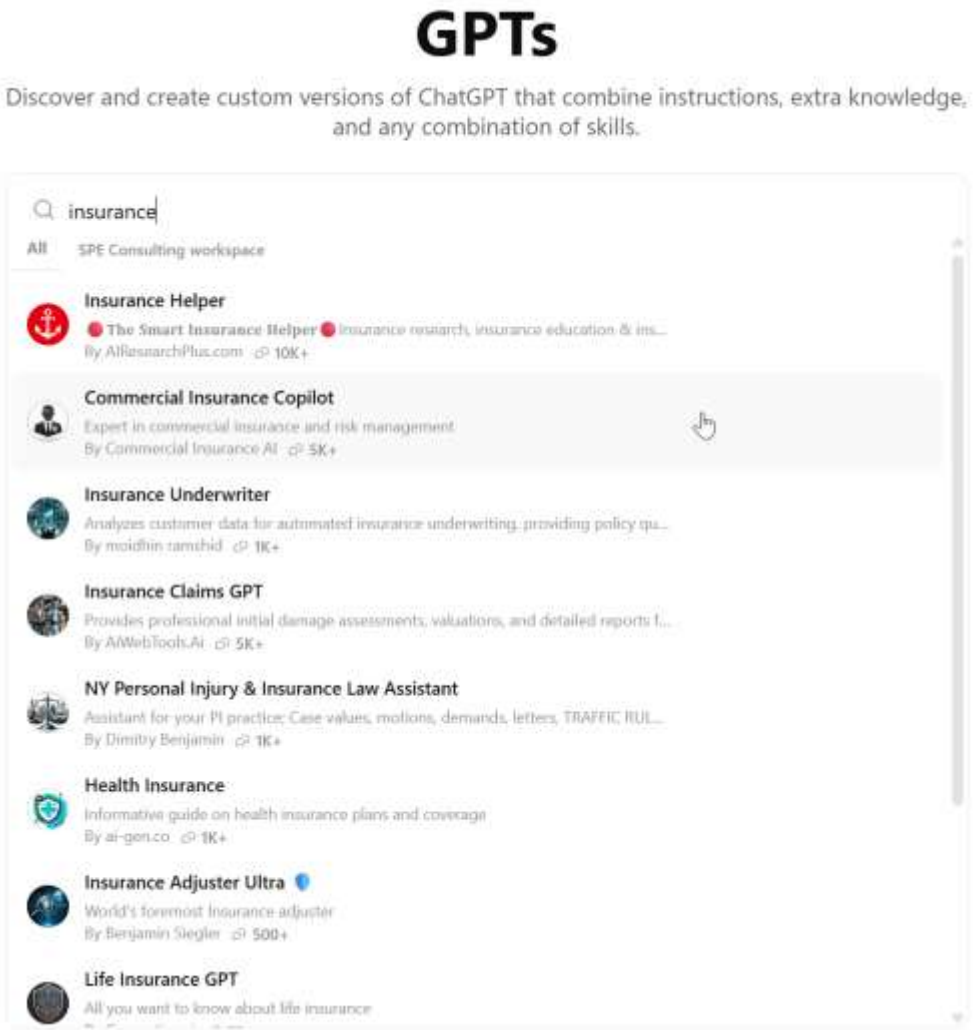
1. Use a **BETTER Prompt** to getter a **BETTER Quality** response
2. The more your **ChatGPT learns and knows about you**, the better your result (set your Customs & Memory)
3. Ask **ChatGPT to Suggest the Prompt** – Give it your outcome/problem

CUSTOM GPTs or GEMs – Create & Train Your Own





GPTs for Insurance Brokers



GUY's GPTs

- Broker Assist
- Domestic Letter Draft
- Claim Assist
- Vehicle Summary
- Section / Cover Summary
- Risk Recommendation

ChatGPT 4o Multimodal AI – since March 2023

Modalities:

- ✓ Text
- ✓ Voice
- ✓ Images
- ✓ Infographics
- ✓ Videos
- ✓ Big Files/Documents
- ✓ PDFs
- ✓ Mind maps
- ✓ Roleplays
- ✓ Export to Word/Excel
- ✓ Meta Glasses

Upload / Analyse Files

Conversational AI

Pictures

Videos

The Top 50 Gen AI Web Products, by Unique Monthly Visits

1. ChatGPT	11. IIElevenLabs	21. PhotoRoom	31. PIXAI	41. MaxAI.me
2. Gemini*	12. Hugging Face	22. YODAYO	32. ideogram	42. Craiyon
3. character.ai	13. Leonardo.Ai	23. Clipchamp	33. invideo AI	43. OpusClip
4. liner	14. Midjourney	24. runway	34. Replicate	44. BLACKBOX AI
5. QuillBot	15. SpicyChat	25. YOU	35. Playground	45. CHATPDF
6. Poe	16. Gamma	26. DeepAI	36. Suno	46. PIXELCUT
7. perplexity	17. Crushon AI	27. Eightify	37. Chub.ai	47. Vectorizer.AI
8. JanitorAI	18. cutout.pro	28. candy.ai	38. Speechify	48. DREAMGF
9. CIVITAI	19. PIXLR	29. NightCafé	39. phind	49. Photomyne
10. Claude	20. VEED.IO	30. VocalRemover	40. NovelAI	50. Otter.ai

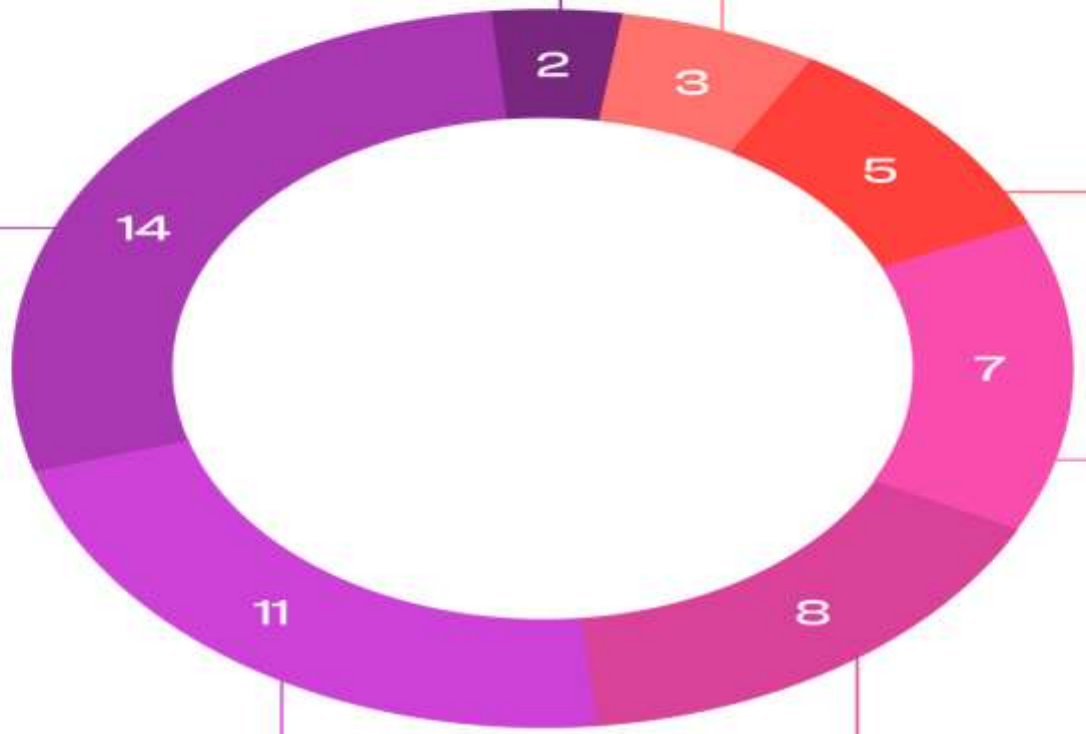
*formerly Bard

Charts are for informational purposes only and should not be used for investment decisions. Past performance is not indicative of future results. None of the above should be taken as investment advice; see a16z.com/disclosures.

a16z Consumer

https://a16z.com/100-gen-ai-apps/

Top Gen AI Consumer Web Products: Companies Per Category



Search 4%

perplexity
YOU

Content Generation 28%

Craiyon
ElevenLabs
Gamma
ideogram
invideo AI
Leonardo.Ai
NightCafe
NovelAI
Midjourney
PIXAI
PIXLR
runway
Speechify
Suno

Content Editing 22%

Clipchamp
cutout.pro
PIXELCUT
Photomyne
PhotoRoom
Playground
OpusClip
QuillBot
Vectorizer.AI
VEED.IO
VocalRemover

Model Hub 6%

CIVITAI
Hugging Face
Replicate

General Assistant 10%

ChatGPT
Claude
DeepAI
Gemini
Poe

Productivity 14%

BLACKBOX AI
CHATPDF
Eightify
liner
MaxAI.me
phind
Otter.ai

Companion 16%

candy.ai
character.ai
Chub.ai
Crushon AI
DREAMGF
JanitorAI
SpicyChat
YODAYO

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a16z Consumer

LIST of Useful AI Tools

- **AI ASSISTANTS** - ChatGPT, Gemini, CoPilot, Grok, Claude, Perplexity, Consensus
- **AI MEETING NOTETAKERS –** Fathom, Zoom AI, Fireflies, Otter
- **AI WRITERS** – ChatGPT, Claude, Jasper, Copy.Ai, Quillbot, Perplexity
- **AI CHAT & VOICE BOTS** – Podium AI, GHL Bots, Copilot.live, Manychat
- **AI EDITORS** – Grammarly, Hemingway, ProWritingAid, (Copyscape)
- **AI IMAGES** – MidJourney, DallE-3, Stable Diffusion, Leonardo
- **AI POWERPOINTS** – Gamma, Tome, Beautiful, Canva Magic Design, CoPilot
- **AI ARTICLE RESEARCH** – Scholar, Consensus, Iris, Scispace, Elicit,
- **AI GRAPHICS** – ChatGPT, Canva AI, Adobe, Shutterstock, Jasper Art, Craiyon
- **AI VIDEO** – Veo2/3, Invideo, Sora, Kling, Flug, Synthesia, Pictory, Runway, CapCut
- **AI VOICE** - Eleven Labs, Murf, Descript, Speechify, Podcastle, Play.ht
- **OTHER AI** – NotebookLLM, Publer & Blaze (Socials), Taplio (LI), Scribe (SOPs)

AI IN ACTION

Solving problems at home and work

Travel the World with AI

1. Personalised Itineraries & Travel Planning
2. Assistance with Packing
3. Realtime language translation

META Glasses & ChatGPT

Imagine wearing **Meta Glasses** to explore the world.

AI guides you, highlighting key information, translating languages, and providing context.

AI-powered tour guides can answer questions, offer recommendations, and enhance your understanding of the world around you.

HallidayGlobal.com - AI Glasses with invisible display in Kickstarter
Apple AI Glasses with AR coming soon

Meta

Your Own **Tour Guide** - Meta Glasses + ChatGPT

For example:

Here we are, standing right in front of David. Look at the size of him — 17 feet tall, carved from a single block of marble by Michelangelo when he was just in his twenties.
But here's the really cool part — this isn't David after the fight. This is David *before* the battle, completely focused, sizing up Goliath. You can almost feel the tension in his muscles, see the quiet confidence in his stance.
Notice his hands — they're oversized on purpose. Michelangelo designed him to sit high on a rooftop, so from down there, the proportions would have looked perfect. But standing here, you can see the power in those hands — the hands that will win the fight.
David isn't just a sculpture. He's a symbol of Florence — clever, bold, and ready to take on giants. And in this moment, we're catching him right before history is made.

Gro

Mark

Defence best stocks

+ Investment

↑ Sort by price

DRS	Leonardo DRS Inc	$29.18	↑1.07%
LOAR	Loar Holdings Inc	$77.01	↑4.07%
HWM	Howmet Aerospace Inc	$103.82	↑1.68%
RTX	Rtx Corp	$123.93	↑0.81%
LHX	L3Harris Technologies...	$246.04	↑1.52%
HEI	Heico Corp	$264.72	↑2.43%
CW	Curtiss-Wright Corp.	$346.92	↑1.95%

View as portfolio

These shares are on my watch list in my brokerage account, can you tell me about more about them?

Growing Your **Business** with AI

Analyse Your DATA & Results
and Give Feedback

AUTOMATE Processes
& Improve Workflows

Growth STRATEGY, Scenarios
& Business Planning

Innovative MARKETING Ideas
– SEO, SEM, Socials, Creating Great Content!

Improve **Your Team** with AI

1

Hiring Process & Onboarding New Staff

- Job Descriptions, Person Descriptions
- Vision, Values, Job Ads and Plans
- Recruiting & Induction

2

Role Clarity, Training & Systemising

- Scripts, Templates, Plans
- SOPs, Video Scripts, Best Practices
- Ideas for Improvement

3

Coaching – Get Help Dealing with Problems

Tough Situations & Advice on Negotiations

Use **ChatGPT VOICE to Roleplay** for Staff Coaching & Training

Boost **Your Productivity** with AI

1. **Effective Time / Diary Management**
   with Motion AI & Notion AI
   Emails / Scheduling

2. **Writing and Documentation** – research, brainstorm, improve & check your written work / SOPs

3. **Solve Problems Faster, Overcome Obstacles**
   and Ideation to Complete Difficult Tasks

CHAT AI

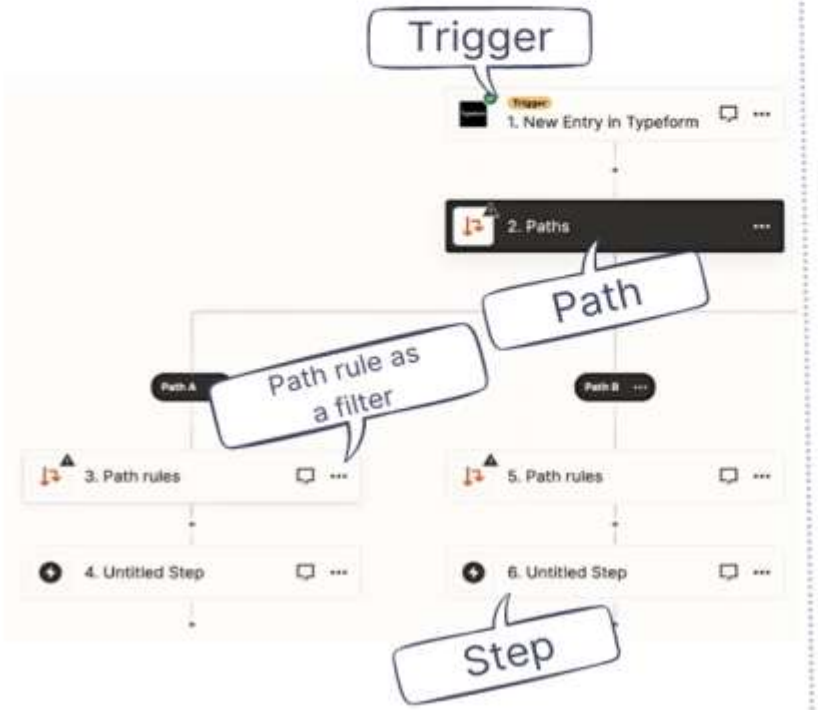
VOICE AI

VIRTUAL ASSISTANTS

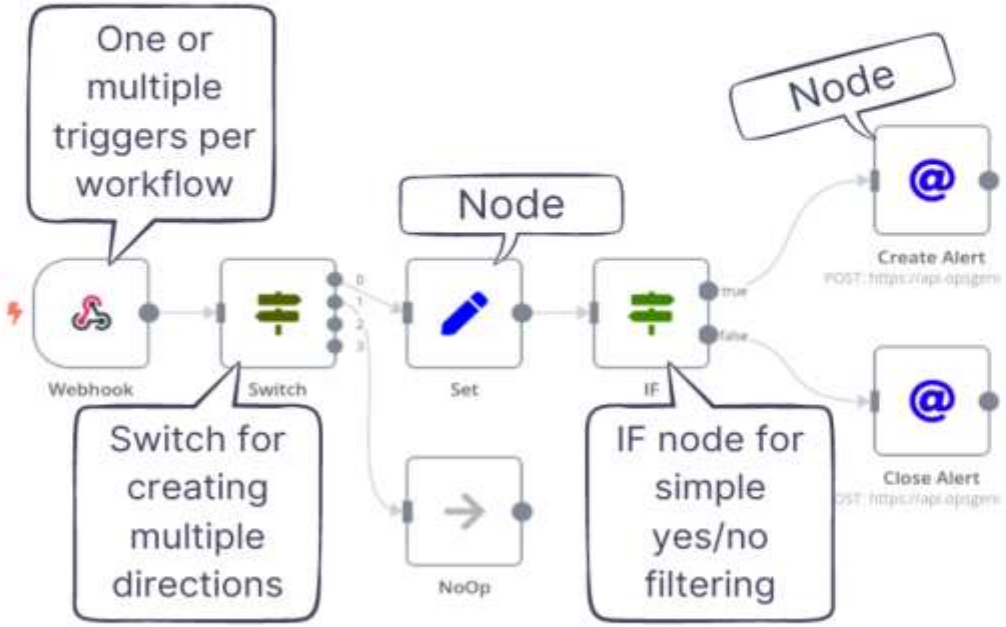
AI Automation Tools

Zapier vs n8n vs Make.com – key concepts

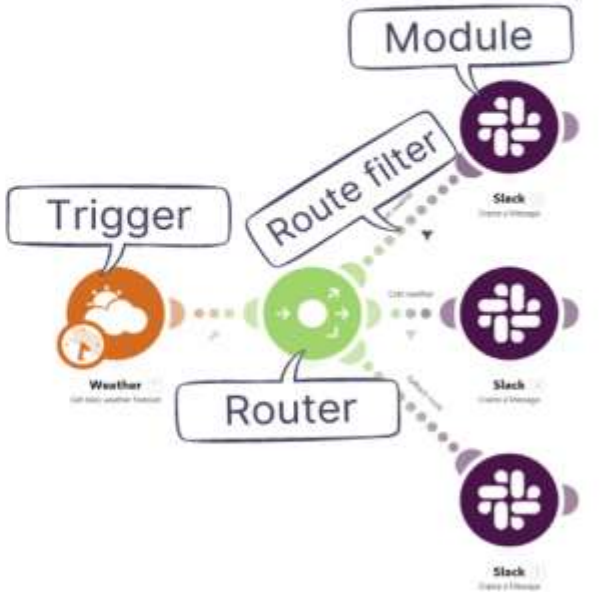
zapier
Zap



n8n
Workflow



make
Scenario



AI in Insurance Industry

CATEGORY	EXAMPLES
Policy comparison	RaindropAI (AU)
Document & data automation	Microsoft Copilot (TAL AU), EXL Ins LLM (global), WatsonX (IBM)
Underwriting / Risk tools	Quantexa, SAS Viya, LexisNexis
Fraud / Claims detection	LexisNexis, Feedzai, Tractable (Vehicles)
Claims AI agents	UnlikelyAI (AU pilot), Hexaware Tensai®
Customer Engagement	Zurich ZCAM CRM, Anthropic Claude
Consulting & platforms	KPMG, EY GenAI, McKinsey, Deloitte consultancies

SO, WHAT ARE YOU GOING TO DO WITH AI?

THE AI CHALLENGE – THINGS TO LEARN

1. Using LLMs like CHATGPT, CoPilot and Meeting Notetakers in your practice
2. Learn Better Prompting – Chain of Thought Prompts – Ask for a prompt suggestion
3. Use ChatGPT VOICE Prompts – Have a deep life or strategy coaching sessions
4. Make your own GPT or GEM = "Ask XXXXXXX" (like Digital Twin Reid Hoffman)
5. Create Articles that are in Your Own Style & Tone – "Humanised" AI writing
6. Create PROJECTS and load all up your useful information, FAQs, POBs
7. Set TASKS to be done – e.g. create a daily curated relevant newsletter
8. Use Google Notebook LLM – turn a big pdf into a podcast (Between 2 people)
9. Make an AI generated Powerpoint in GAMMA or TOME – for a client presentation
10. Make Better Content for Multiple Channels – Make VIDEOS / Hook Point
11. Use AI for improving Website SEO/SEM, Social Posts at Scale, Problem Solving
12. Train a BOT or AGENT – ChatBot AI (text) or Voice Agent AI
13. Create Agentic Workflows & ChatGPT Agent / Open AI Assistants API – make, n8n, Zapier

AVOID The 5 Deadly SINS of AI in Insurance

1. Privacy Breaches

Mishandling personal data can lead to identity theft and unauthorised profiling.
✅ Use secure platforms like CoPilot for handling MGA documents and client data.
❌ Avoid sharing identifiers or confidential info with general AI tools like ChatGPT.

2. Didn't Check AI's Results

Relying on AI without human oversight can result in incorrect advice
✅ Always verify AI-generated outputs before using them in client interactions or underwriting.

3. Sharing Your Data/IP

✅ Paid options are usually more secure than free versions. Check your AI settings and turn off "Improve the model for everyone" to minimise privacy and data control concerns. (Avoid Chinese AI)

4. No Legal Compliance

Violating data protection laws (e.g., OAIC, Privacy Act) can lead to fines and lawsuits.
✅ Ensure AI tools comply with relevant regulations and maintain proper documentation.

5. YOU are Liable for Advice

Users are liable for incorrect decisions based on AI outputs.
✅ Ensure professional judgment is applied before acting on any AI advice.

“You don’t have to
DO IT YOURSELF

Just get the right things
DONE WELL!”

Finding Tech-Savvy AI Help

Young, Tech-Savvy Expert (EA/PA)

Finding a skilled and enthusiastic person can accelerate your AI journey. This will save you time and frustration while building your future.

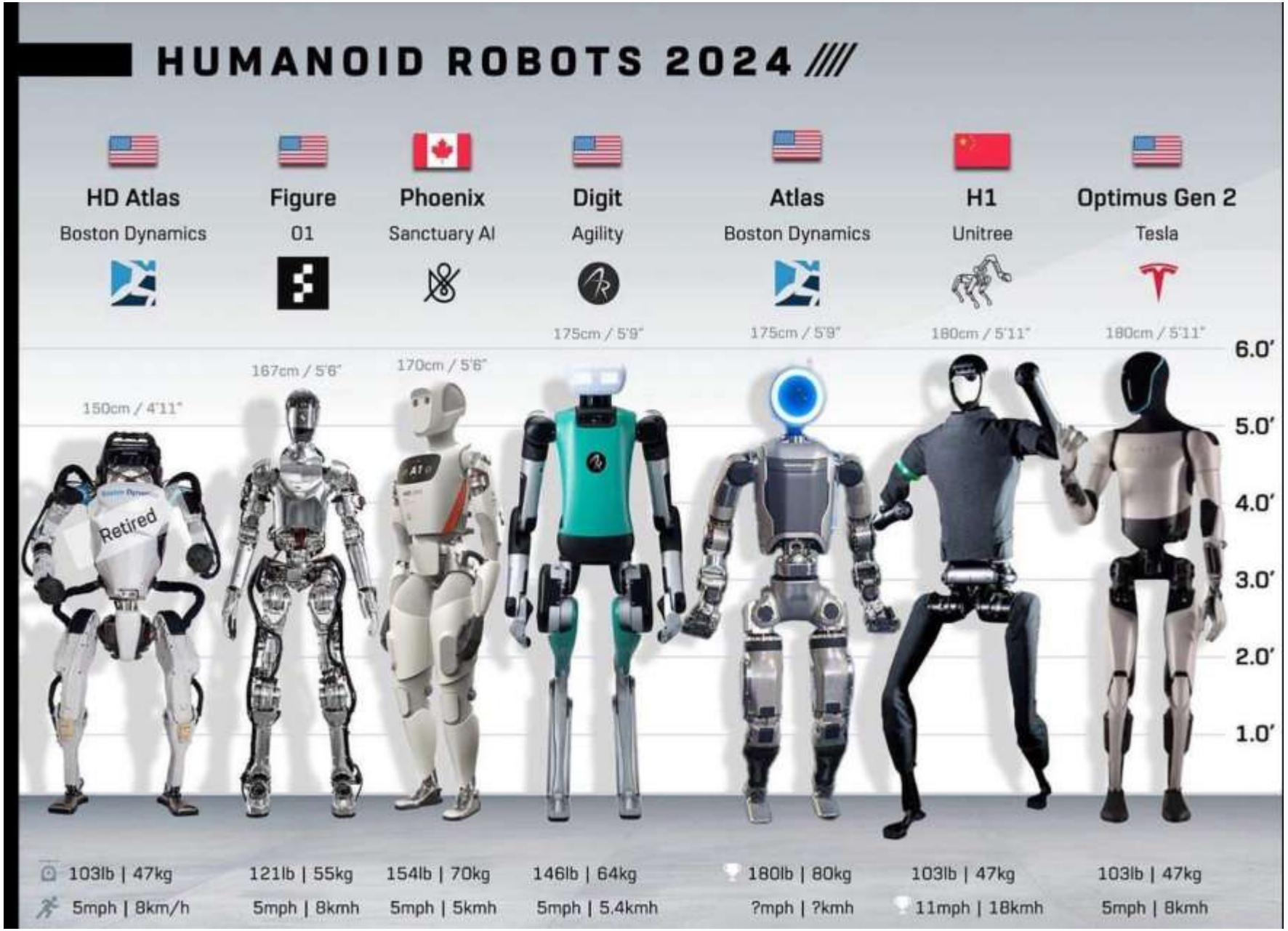
Outsourced, Tech-Savvy Expert (VA)

Virtual assistants powered by AI can efficiently handle administrative tasks, freeing up time for business owners to focus on high-priority work. These assistants can also offer personalised customer support and streamline workflows by automating repetitive tasks.

Where to find them:

- Upwork.com
- Onlinejobs.ph
- Wrkpod.com

GET a Humanoid Robot – trained with AI



HUMANOID ROBOTS RUN BY AI AGENTS
<u>ARRIVING NOW!</u>

Figure 02 – Open AI $$
Phoenix – Sanctuary AI
Digit – Agility Robotics (Amazon)
Atlas 2 – Boston Dynamics (Hyundai)
H1 – Unitree $90k
Optimus Gen 2 – Tesla $10k-$20k
G1 – Unitree $16k
Robonaut 2 – NASA
RT-2 – Google
Kuavo – Leju Robot $$
ERS-7 & Qrio – Sony
Apollo – Apptronik (NASA)
T-HR3 – Toyota
Neo – 1x
GR1 – Fourier Intelligence $$
CyberOne – Xiaomi
Mentee Bot by Mentee AI
Surena IV – Tehran Uni

1. Physical Labour
2. Consumer Household
3. Off World Uses

AI Learning Resources

Facebook Pages

- **AI Savvy**
- **The AI Surfer**
- **Adam.Digital**
- **Alamin**
- **AI Fire (AI Cheatsheets)**

AI Tools & Workflows

- **Digitalsamaritan.co**
- **Prompt-Genie.com**

Instagram Gurus

@artificialintelligencenews

YouTube Channels

AI Advantage

All About AI

Matt Wolfe

AI Explained

@jonathanmast_withai

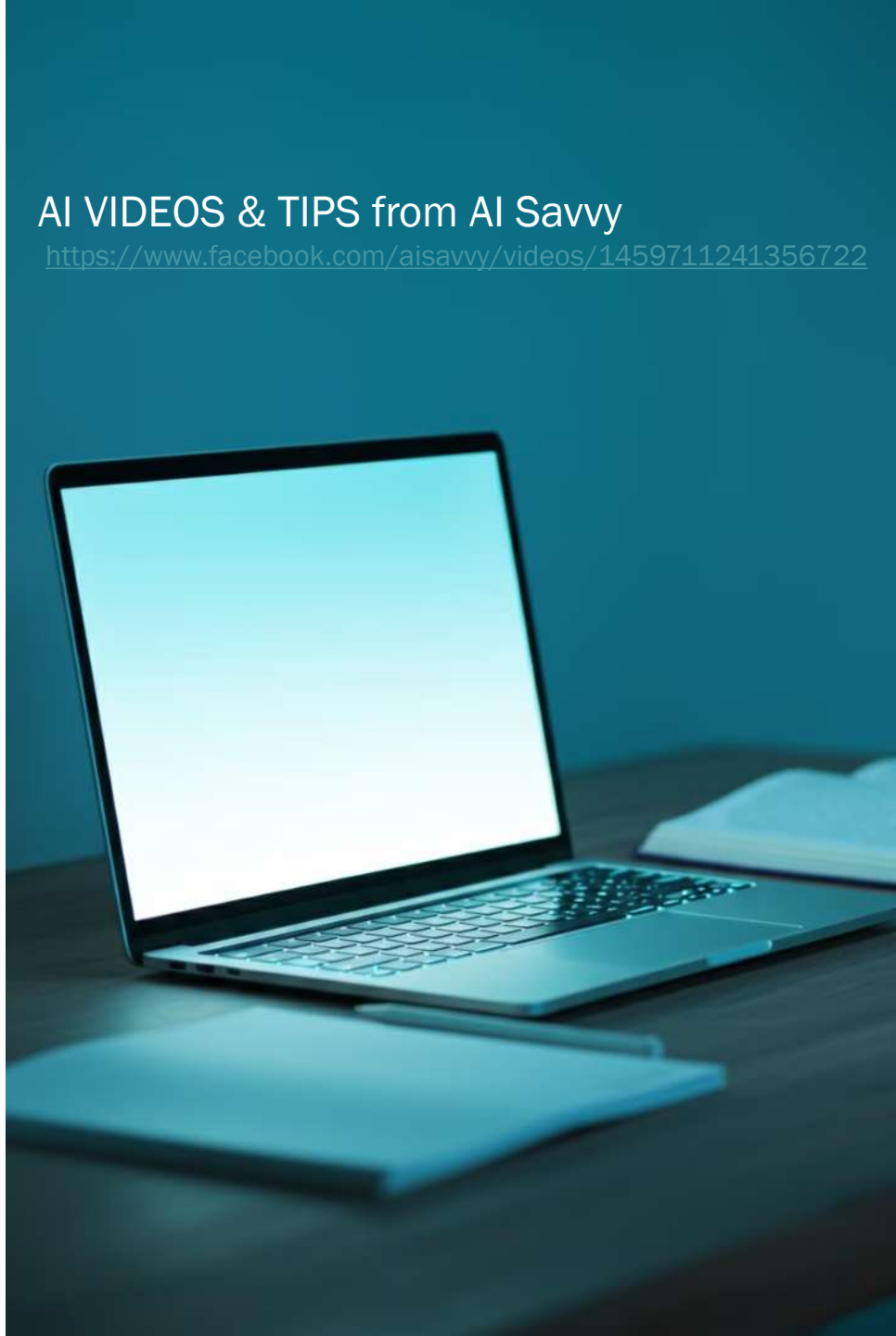
Dave's AI Resources

https://learn.microsoft.com/en-us/viva/learning/academy-copilot

https://davidstaughton.com.au/resources/ai-learning-resources/

AI VIDEOS & TIPS from AI Savvy

https://www.facebook.com/aisavvy/videos/1459711241356722



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