

WELCOME!

AI Workflows & Use Cases for Agents



KIMBERLY FOX

Commercial Lines Operations
Leader
O'Connor Insurance Associates



WALKER ROSS

Account Executive
G.R. Little Agency

Session 4 of Agency AI Labs – Phase 1 (Foundations)



Agency **AI** Labs

BROUGHT TO YOU BY

BIG i

AGENTS COUNCIL
FOR TECHNOLOGY.

Introduction and Context

Introduction

What we're covering today

- A simple, repeatable way to streamline agency workflows using AI
- A lightweight “knowledge base + starter prompt” setup pattern
- How AI can help you compare and refine those documents

"You'll leave with a prompt you can use today — no tech background required."



Purpose-Driven AI Adoption



Purpose-Driven AI Adoption

AI Adoption Principles

- **Purpose-driven adoption:** target workflow inefficiencies, not shiny tools.
- **Stress reduction:** eliminate repetitive work so staff can focus on higher-value client work.
- **Responsible AI usage:** privacy, compliance, and human review as non-negotiables.

Team Building Using AI



Special Projects Team

Creation of the Team

Use Assessments (Kolbe, Working Genius, CSF, etc.)

Diverse (Department, Age, Seniority, etc.)

Goals of the Team

Working 'ON' the business, not 'IN' the business

DAMAIC: Define, Analyze, Measure, Improve, Control

Project Based





Team Building
with AI Use Case:

CORE Team

Four-Member Commercial Lines Team

Walker – Team Lead/Sales

Sarah – Lead Account Manager

Erin – Account Manager


Madi - Sales


Vetting Leads & Prospects

Lead Vetting with AI Use Case:

Claude/ChatGPT Project

Process

- 1. Export Lead list from source of choice (Insurance Xdate, LeO, LLM scrub)**
 - 2. Create Project in LLM**
 - 3. Set description to:**
 - Analyze the list of leads that are uploaded. Scrub the Internet and all other sources for data on each lead to vet them against our Ideal Client Profile. Our Ideal Client Profile for Commercial Lines is Minimum Premium of \$12,000. The prospects should have high google reviews, several employees, and a confirmed phone number or email address. Be sure to include a section with 'fun fact' type information that a salesperson could use to make a connection. Could be involvement in community events, birthdays, sports teams, etc.
 - 4. Export CSV and Upload to CRM**
 - 5. Calendar Reminder to run every month**
 - 6. Lead Sourcing and Vetting!**
- 

The background is a solid blue color with a complex pattern of white, stepped, geometric lines that create a sense of depth and movement, resembling a circuit board or a modern architectural design. The lines are arranged in a way that they seem to recede into the distance, creating a 3D effect.

Policy Comparison and Workflow Transformation

From Manual Policy Review to AI Agent Execution

Challenges of Manual Review

Manual policy comparison is time-consuming and prone to human error due to subjective judgments and document length.

Benefits of AI Execution

AI reduces review time drastically and standardizes outputs, improving auditability and compliance.

Scaling Expertise and Efficiency

Embedding best practices in AI workflows enables agencies to scale expertise and enhance operational efficiency.



Workflow Transformation with AI:

Personal Lines Renewal Process

Only For A level PL Clients, AA & AAA receive personal reach out from Account Managers

1. Customers are automatically sent a Renewal Questionnaire triggered by their upcoming Renewal Date in CRM
2. Upon Completion, form is returned to Account Analyst (Not client facing staff)
3. Account Analyst inputs Renewal Checklist, Renewal Questionnaire, Expiring & Renewal Policies into Comparison tool (Outmarket)
4. Account Analyst sends this report to AM and notes any areas of concern or if renewal can proceed with no changes





Culture Building Through AI and a Little Claude Code

FIFA World Cup Pool

Prompt Claude:

Give me a prompting sequence to create an office Fifa world cup pool. It should be structured like the espn bracket challenge for march madness. Fifa colors and aesthetic should be used with country flags etc. It should be able to continuously update based on match results in real time and have a leaderboard based on whose bracket is currently in the lead



Business Impact and Implementation Strategy

Scaling AI Through Process-Driven Design

The background is a solid blue color with a series of white, stepped, geometric lines that create a sense of depth and movement, resembling a stylized staircase or a series of parallel paths. The lines are arranged in a way that they seem to recede into the distance, creating a 3D effect.

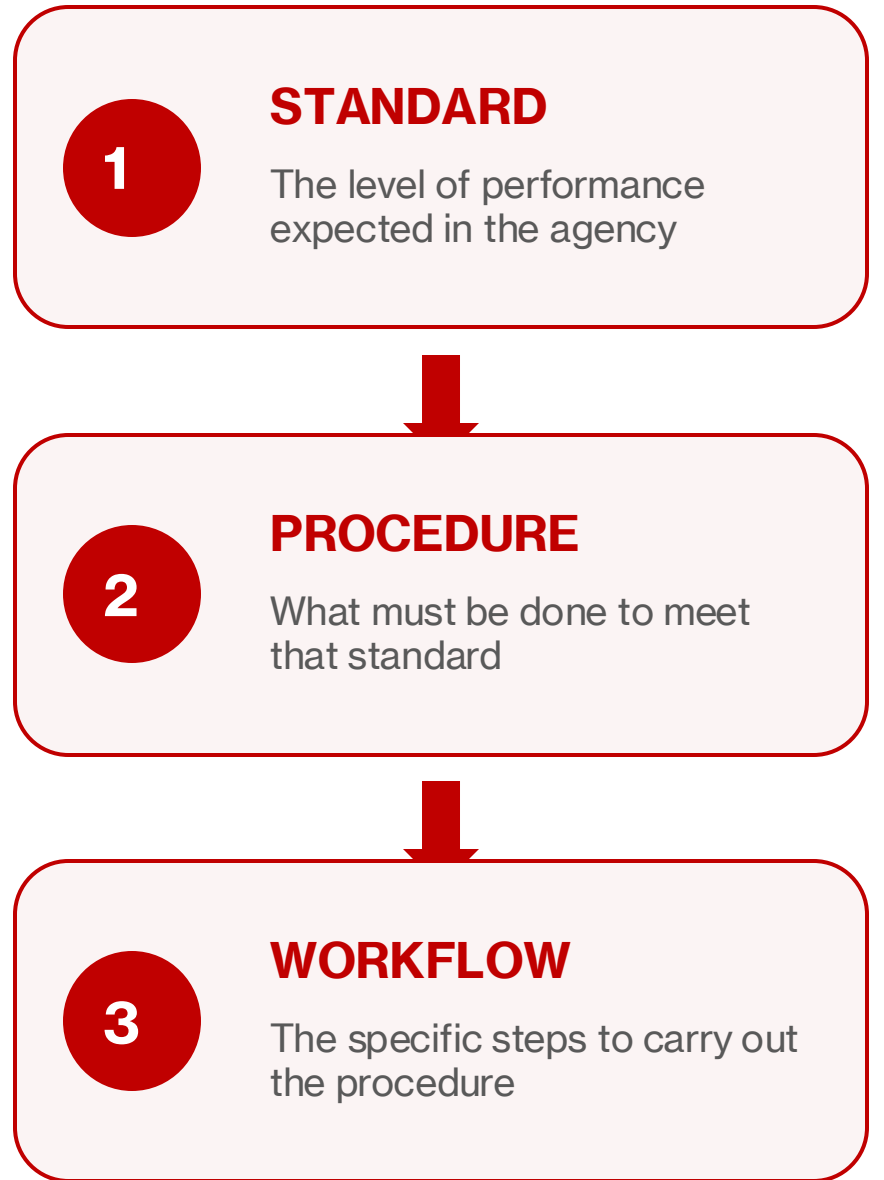
AI and Workflows

Standard Operating Procedures

Agency leadership defines the standard

Procedures dictate the who, what, when, why, how, and which tools

Workflows capture step by step instructions



Core Components of Using AI to Design Procedures & Workflows

Definition

Define **clear steps, responsibilities, and conditions** to enable transparency and automation.

Consistent Output Structure

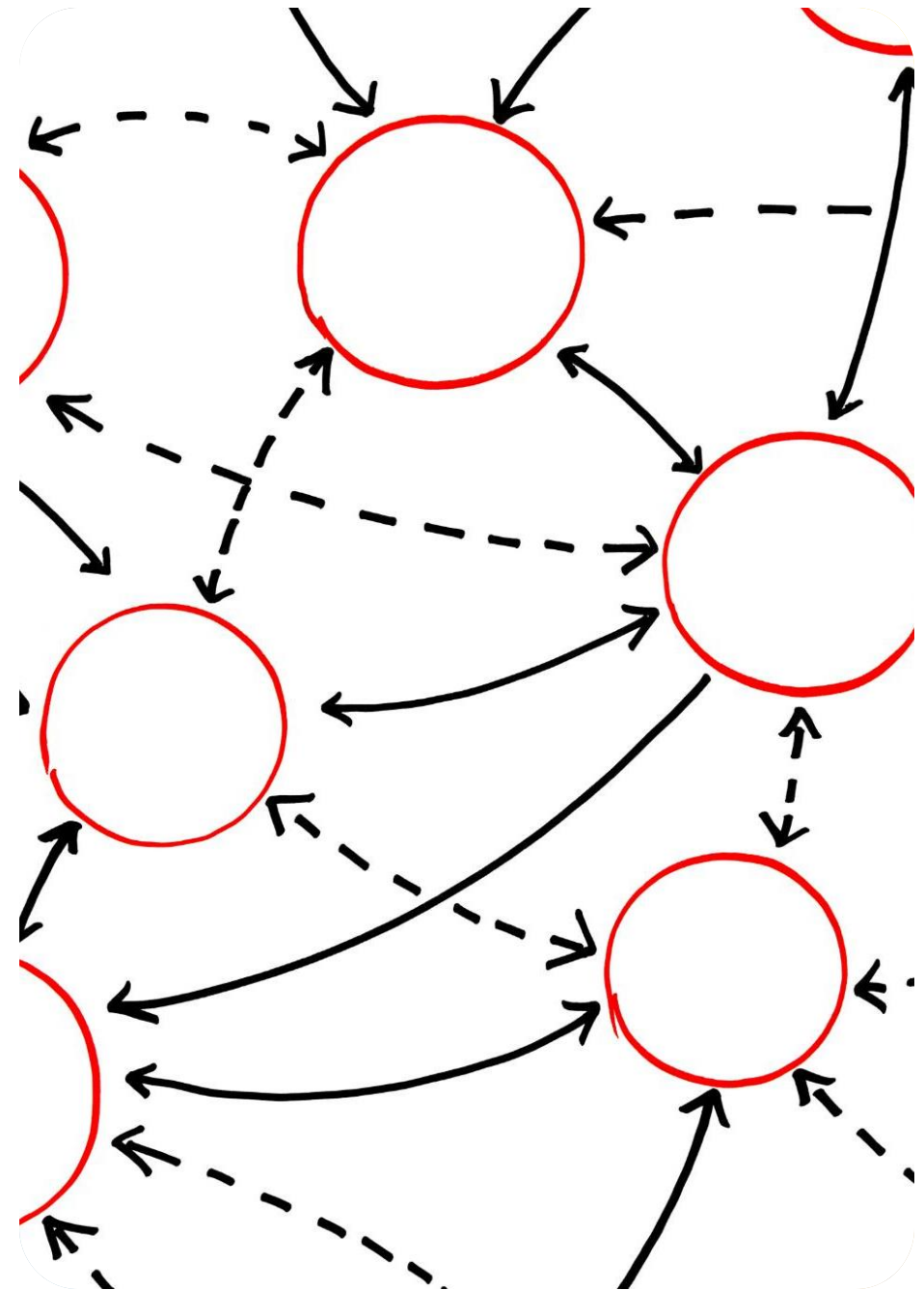
Design standardized output formats including summaries, comparisons, and recommended actions for clarity.

Reusable System Prompts

Create **reusable prompts (or project instructions)** that encapsulate workflow logic for repeated deployment without reconfiguration.

Integration and Continuous Refinement

Integrate the AI agent into daily workflows and **continuously test to improve** performance over time.





Designing and Building AI Agents

Create standard operating procedures upon request. Use consistent formatting and branding (see <https://claude.ai/project/019d0c5c-ad78-7514-bcc0-bb166d800074> for branding). Will be used internally by a best practices independent insurance agency.

Original Prompt

1st iteration →

O'Connor Insurance Associates — SOP Generator
Interactive artifact

Here's your branded SOP Generator for O'Connor Insurance Associates! Here's what it does:

How to use it: Type any SOP topic (e.g. "New Client Onboarding" or "Claims Intake Procedure"), optionally add context about specific tools or workflows, and click Generate. You can also click any of the example topic buttons to populate the field.

Every generated SOP includes:

- OIA branding with your color palette (greens, blue, gray) and signature/approval lines
- Structured sections: Purpose, Scope, Responsibilities table, Definitions, Numbered Procedure steps, Exceptions, Compliance & E&O notes, and Related Documents
- Department-coded SOP numbering (PL = Personal Lines, CL = Commercial Lines, OPS = Operations, SVC = Service)
- Built-in E&O and NC regulatory considerations where relevant
- A "Copy as Text" button for pasting into Word, your AMS, or email

Tips for best results:

- Add context like specific tools (AMS360, Applied Epic, Zywave) or team roles
- Mention if it's personal lines vs. commercial lines focused
- Note any carrier-specific steps or compliance considerations you want included

The Build

To Date, there have been 39 43 revisions since the initial artifact was generated in April 2026

- ‘Add an option to upload or paste transcripts from recordings, recorded videos, and existing files/documentation related to the process/procedure/workflow’
- ‘Include background instruction to review documents in chronological order of creation/most recent edit date and always ask for clarification if any details provided conflict.’
- *‘The generate button no longer works’*
- *‘Still getting this error: Could not generate SOP. Please try again.’*
- ‘I need to be able to export the SOP as a word document once it's been generated’
- ‘The exported word document needs to be fixed - table columns run off the page in some sections and others are not wide enough.’
- ‘Add to background knowledge (document uploads - **How to Actually Build SOPs.docx, EOS Model for Creating SOP's.docx**)’
- ‘The naming convention of the generated SOP's is inconsistent. can you build in a standard format/rule for the file name / SOP #?’
- ***‘As an operations manager, how could I improve this prompt?’***

Revise, Revise Again

The background is a solid blue color with a complex, white, geometric pattern of overlapping, stepped lines that create a sense of depth and movement, resembling a stylized circuit board or a modern architectural design.

Demonstration and Output Value

Build Your Own SOP Generator

Ingredients of a Great SOP Prompt

1

Who you are

Agency name, states licensed, lines of business, and your AMS.

2

Who does the work

Your actual role titles – not generic ones.

3

How you want it formatted

Sections, step style, and length guardrails.

4

What to watch for

E&O flags and your specific compliance context.

5

What to do when something's missing

Tell it whether to ask, assume, or flag the gap.

The prompt is your agency's operating manual for the AI — the more specific you are, the more useful the output.

Best Practices & Watch-Outs

TOP 5 BEST PRACTICES

- Start with a process you know inside and out
- Feed it real source material whenever you have it, and specify how you want to provide the data
- Review every output before it goes into use – AI is confident even when it's wrong
- Keep your prompt updated as your team or tools change
- Build one SOP at a time and refine as you go

TOP 3 MISTAKES TO AVOID

- Using the output without reviewing it – especially coverage, endorsements, or cancellations
- Assuming the AI knows your AMS – tell it explicitly what you use
- Treating the first draft as final – the best SOPs come from iteration

Next Steps: Build Your First SOP This Week

WHERE TO START THIS WEEK

- 1 Pick the process your team struggles with most
- 2 Record a 10-minute walkthrough of how it works
- 3 Drop it into your AI tool with the starter prompt
- 4 Generate your first SOP
- 5 Review it with the person who does the work

THE BOTTOM LINE

“You don’t need to be a developer to build this. You need to know your agency, know your processes, and be willing to tell the AI what matters.”

The hardest part isn’t the technology — it’s getting honest about how your agency actually operates.”