

WELCOME!

Your AI Customer Service Rep

A Second Set of Hands



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Session 2 of Agency AI Labs – Phase 2 (Growth & Operations)



Agency AI Labs

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AGENTS COUNCIL
FOR TECHNOLOGY

What you signed up for...



Agency **AI** Labs

PHASE 2

Free AI training for independent insurance agencies.
Real skills. Real workflows. No tech background required.

BROUGHT TO YOU BY



- ✓ Free for Big "I" Members
- ✓ Free for ACT Partners

Phase 2 Sessions – Tuesdays in Aug • 2PM ET • Live On Zoom & On-demand

4 Aug

Session 1

AI for Growth: Measuring the Real Impact of AI

11 Aug

Session 2

Your AI Customer Service Rep

18 Aug

Session 3

AMS Providers Panel on AI

25 Aug

Session 4

Claude in the Agency: A Live Working Demo

Meet the Panelists



MODERATOR

Christopher Gosselin

Head of Product at Cara.



PANELIST

Christopher Keats

COO, Keats Insurance Agencies



PANELIST

Todd Dailey

President & COO, Insurance
Management Group

Thank You!

ACT SUPPORTING PARTNERS

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EZlynx

Fall Line
SPECIALTY LLC

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Fulcrum

Gail

The Hanover
Insurance Group

HAWKSOFT

HUG
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INSURANCE

MERCHANTS
INSURANCE GROUP

NATIONAL
GENERAL
an Allstate company

NASA

Nationwide
is on your side

NetVU
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vBots
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Simple. Powerful Technology to Grow Your Agency

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INSURING GROWTH

Reminders

- This session is being recorded – you will receive an email with the recording tomorrow afternoon
- Ask questions in the chat!
- The Agency AI Labs Community is LIVE
- Please fill out the after-session survey



Disclaimer

The views and opinions expressed in connection with Agency AI Labs are those of the speakers and do not necessarily reflect the official policy or position of the Agents Council for Technology (ACT), IIABA or its subsidiaries and affiliates. The program is intended for general informational purposes only and should not be considered legal, investment or other professional advice. For specific expert advice, the services of an appropriate professional, such as an attorney or accountant, should be sought.



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What You'll Leave With

- What actually changes day-to-day when AI takes on service work: what got faster, what got better
- What comes off a team's plate entirely, versus what still needs a human
- The four stages of AI maturity: a practical way to place your agency and plan next steps
 - Why redesigning a workflow around AI beats bolting AI onto the old one

TODAY'S FLOW

The Problem
Starting & Growing
Onboarding & Adoption
Client Impact
Framework Recap

The AI Maturity Framework

Key takeaway: with clear expectations, AI can handle complexity traditional software could not.

1

Ask AI

AI as documentation — superior search and knowledge management for agency files.

2

One-Off Tasks

AI as a tool — individual, discrete tasks handled faster.

3

Workflows

AI as an assistant — standard workflows built to run end-to-end.

4

Goal Setting

AI as a resource — strategic goals, with autonomy to act proactively.

Opening Poll

Where does your agency sit today?

- Ask AI — we use it for search and documentation
- One-Off Tasks — we use it to speed up individual tasks
- Workflows — built into standard end-to-end processes
- Goal Setting — strategic goals, AI acts proactively

LIVE POLL

*Respond in the webinar poll
panel*

PART 1

The Problem, Made Concrete

Where the work gets buried today and what changes first.

Complex Coverage Question

A client asks: "Am I covered for this considering...?" and someone starts digging

Same request. Different amount and depth of digging.

On Your Own

MINUTES+

That digging can be manual, step-by-step search and navigation on your own through dozens of files.

AI as a Tool

MINUTES

Using AI as a tool reduces digging down to minutes, though still requiring manual step-by-step direction.

AI-First Partner

DONE

AI acts as a second set of hands. Answers are proactively generated, with coverage gaps and considerations flagged preempting future questions.

COI Example

A client asks: "Can I get COIs for this list of cert holders?"

Inefficient Process: Add-AI On

- Message the CSR, add to the tracker
- Review the master certificate, check endorsements
- Update the log, email the insured
- AI only reviews at the very end

Result: ~20 minutes+

AI-First Process

- Forward the email request
- AI tracks, creates, and reviews the COI
- Checked against the policy before it goes out
- Same outcome, delivered end-to-end

Result: ~30 seconds

Key takeaway: it is more impactful to re-build workflows with AI in mind rather than bolting AI onto an existing workflow.

“

Redesign the workflow around AI, don't just bolt AI onto the process you already have.

KEY THEME

AUDIENCE CHAT — How long does a COI take your team today, start to finish?

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PART 2

Starting & Growing with AI

Where agencies begin and how far they've taken it since.

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STARTING WITH AI

What was the first client-facing moment you handed to AI; a coverage question, a COI request, a call, a follow-up? What made you pick that one to start with?

GROWING WITH AI

What's a client request your team now handles with AI that previously would've taken someone 20-30 minutes?

GROWING WITH AI

What's the most complex client interaction you've trusted AI to help with — and what made you comfortable enough to let it?

Key Theme

The entry point isn't the end state, where you start with AI isn't where you end up.

AUDIENCE CHAT — What's one workflow you'd redesign goal-first if you started today?

PART 3

Onboarding & Team Adoption

Getting a whole team, not just one champion, on board.

ONBOARDING WITH AI

**Was there a moment someone on your service team worried AI would make client interactions feel less personal?
What actually happened?**

ONBOARDING WITH AI

What client-facing task still absolutely needs a human — where's the line, and how do you know when to hand it off?

Key Theme

Adoption is a people problem before it's a tools problem.

AUDIENCE CHAT — What's one task you still don't fully trust AI to handle on its own?

PART 4

What the Client Actually Notices

The real test of AI maturity, from the other side of the conversation.

WHAT THE CLIENT NOTICES

When a client calls or emails with a question now, what's actually different about how fast, or how well, they get an answer?

WHAT THE CLIENT NOTICES

Has a client ever noticed something changed, without you telling them AI was involved? What did they say?

AI: NEXT STEPS

For someone sitting where you were a year ago, what's the one thing you'd tell them to do, and what shouldn't they expect on day one?

Key Theme

The real test of AI maturity isn't what it saves your team, it's what your client experiences on the other end.

AUDIENCE CHAT — If you use AI: Has a client ever told you they got a faster/better answer than they expected?

Final Poll: Your Next 30 Days

What's the first step you'll take in the next 30 days?

- Try AI on a single task
- Rebuild one workflow goal-first
- Get my team using AI for search and documentation
- Set a strategic goal and let AI take the first pass

LIVE POLL

*Respond in the webinar poll
panel*

About Cara

Professional AI platform purpose-built for insurance agencies and brokerages.

- Policy checking, gap analysis, and coverage comparisons
- SOVs, COIs, and carrier supplementals handled end-to-end
- Inbound and after-hours calls answered automatically

Want Cara to reach out?

Let us know in the post-session survey.

Thank You

Open Q&A — drop your questions in the chat.

CLOSING & WHAT COMES NEXT

Upcoming Session

Aug 18 @ 2pm ET

Session 3 – AMS Providers Panel on AI



Homework

Think of questions for our AMS providers panel!

Please fill out the after-session survey!

