

The Intelligent Agent: Quick Tips & Tricks

Getting the Most from Your AI-Powered Insurance
Platform



Getting Started

Your Login Credentials




- Check your email for your personalized login link
- Bookmark the platform URL for quick access
- Use the "Remember Me" option on trusted devices

First Week Checklist

- Complete your profile setup
- Explore your role-specific dashboard
- Try asking one coverage question per day
- Review your assigned learning path

AI Chat: Your Insurance Brain

How to Ask Better Questions

-  "What's the difference between replacement cost and actual cash value on a BOP?"
-  "Show me exclusions in a standard GL policy for contractors"
-  "Tell me about insurance" (too broad)

Pro Tips

- Ask follow-up questions to dig deeper
- Use it before bothering your manager
- Save frequently used answers to your notes

Common Uses

- Coverage interpretation
- Policy comparison
- Underwriting questions
- Forms and endorsements

Learning Paths & Resources

1

Your Training Dashboard

- View assigned courses under "My Courses"
- Track completion percentage
- Courses auto-save your progress
- Mobile-friendly for learning anywhere

2

Time-Saving Approach

- Courses are 7-9 minutes each
- Complete 1-2 per week
- Focus on your immediate needs first
- Revisit modules as refreshers

Resources Tab

What You'll Find

- Agency SOPs and workflows
- Prospecting Playbooks
- Renewal Playbooks and Workflows

Search Function

- Use keywords to find documents fast
- Filter by category or date
- Download PDFs for offline access

Mobile Access & Troubleshooting

Learn On The Go

- Platform works on any device
- Complete courses during downtime
- Access AI chat from your phone
- No app download needed

Common Issues & Solutions

Issue	Solution
Can't log in	Check email for reset link or contact support
Course won't load	Clear browser cache or try different browser
AI response seems off	Rephrase question with more detail
Can't find a resource	Use search bar or ask manager

Support

Need Help?

- Email: [d](#)
- Response time: Within 24 hours
- Check your spam folder for replies

Best Practices & Quick Wins

DO:

- Use it daily for maximum benefit
- Ask real questions you encounter
- Complete assigned training on time
- Explore features beyond requirements

DON'T:

- Share login credentials
- Rely solely on AI without verification
- Skip mandatory training
- Wait until you're stuck to explore

Quick Wins



Week 1:

Master the AI chat basics



Week 2:

Complete first 3 courses



Week 3:

Explore Resources tab



Week 4:

Use platform as your first resource before asking colleagues

Questions? Our support team is here to help you succeed!