



BenefitLab.ai

Where benefits knowledge meets practical AI.

Leverage for Insurance Agents

Part 2

Creating Leverage



Lesson 18: Leverage Through Tools



Knowledge



Strategy



Growth



Tools Reduce Friction

- Tools create leverage by reducing friction in everyday processes.
- They remove unnecessary steps.





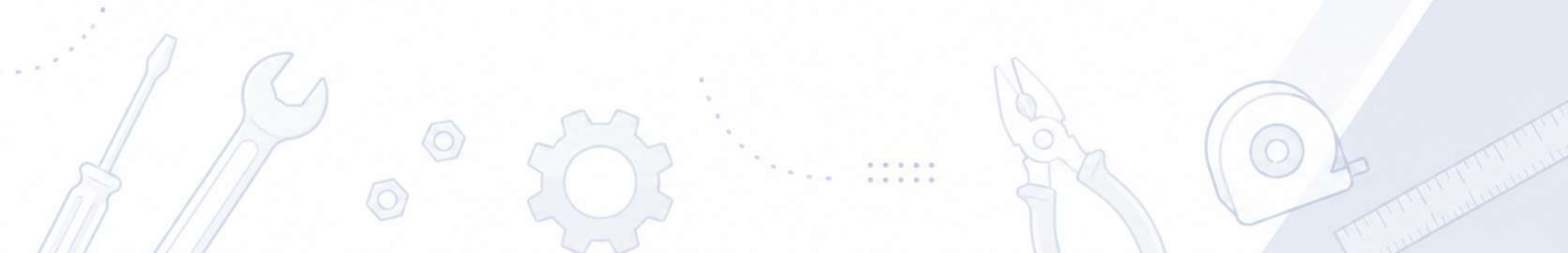
Simple Example

- A good example is electronic signatures (like DocuSign)
 - No printing
 - No scanning
 - No manual sending
- The entire process becomes simpler.



What That Does

- Faster turnaround
- Fewer errors
- Better client experience
- The same task, but done much more efficiently.





Not All Tools Are Equal

- The best tools don't just make things a little easier.
- They remove entire steps.



Remove the Work



- A small improvement saves time.



- Removing a step changes the process.



Tools = Leverage

- This is what leverage actually is.
- A small input creating a much larger result.
- A lever.
- And a lever is a tool.
- So when we talk about tools creating leverage...
- this is exactly what we mean.



Real Example: Removing Steps

- Let me show you what this looks like in practice.
- Because this is where tools really create leverage.



Traditional Process

- Think about a typical renewal.
 - Open renewal documents
 - Pull census data
 - Enter into quoting tool
 - Identify similar plans
 - Compare options
 - Build client output
- That's a lot of manual steps.



Where the Friction Is

- Each one of those steps:
 -  takes time
 -  creates opportunities for error
 -  slows everything down
- **That's friction.**



Extractor Example



Now let's look at a different approach.



The extractor removes steps.



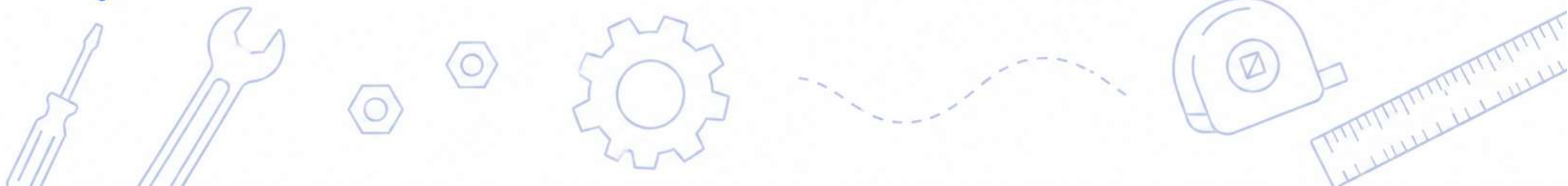
Pulls data directly from the renewal



Eliminates manual data entry



That work just disappears.



Next Step: Smart Quoting Tool (Stella Online coming soon)



Then the quoting tool takes it further.



Generates quotes



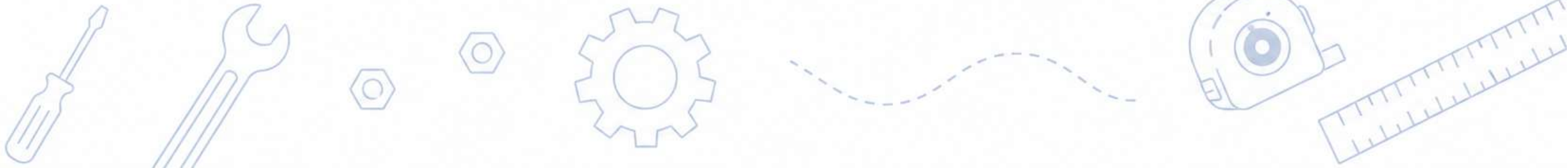
Selects comparable plans



Builds client-ready output



These are steps that normally require manual work.



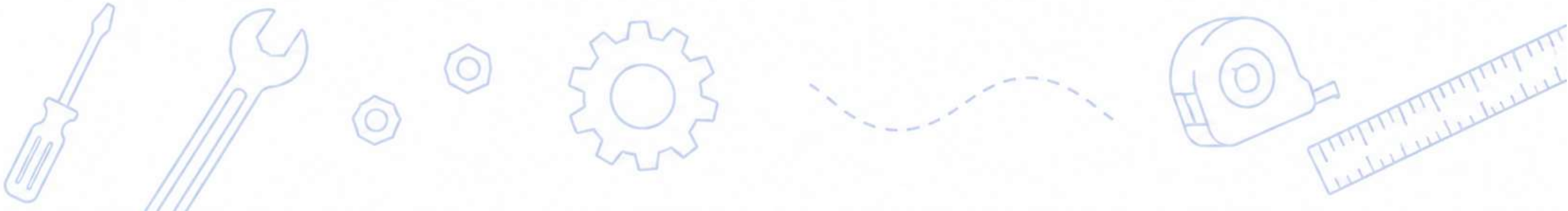
What's Changing



You're not just speeding up the process.



You're removing parts of it entirely.



This Is the Point



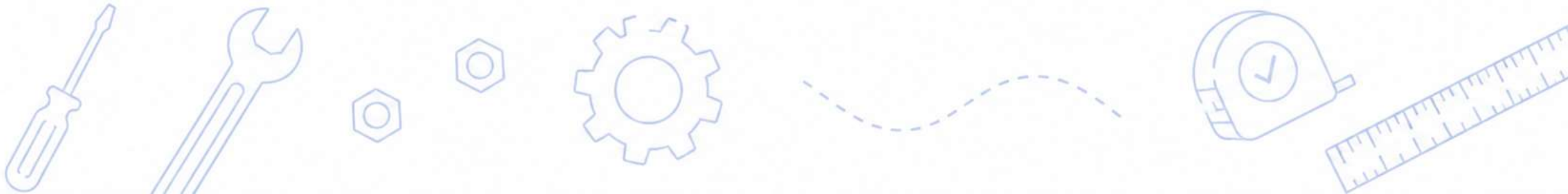
This is what a good tool does.



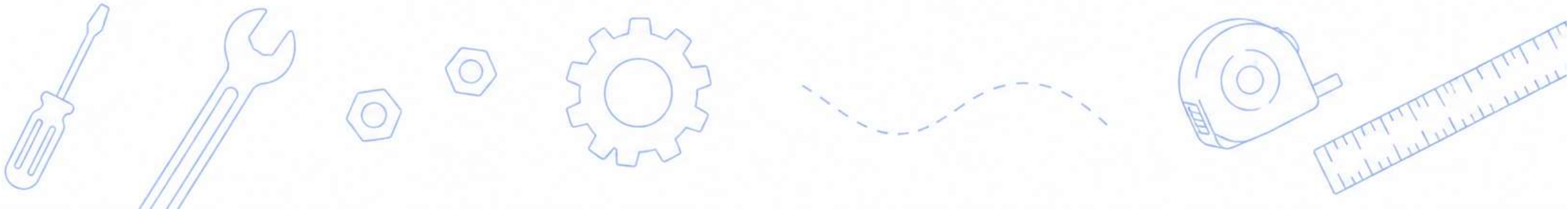
It doesn't just help you work faster.



It eliminates steps.



That's **one example**, but this principle applies anywhere you have repeated steps.



Multiply Output



This applies to:



communication



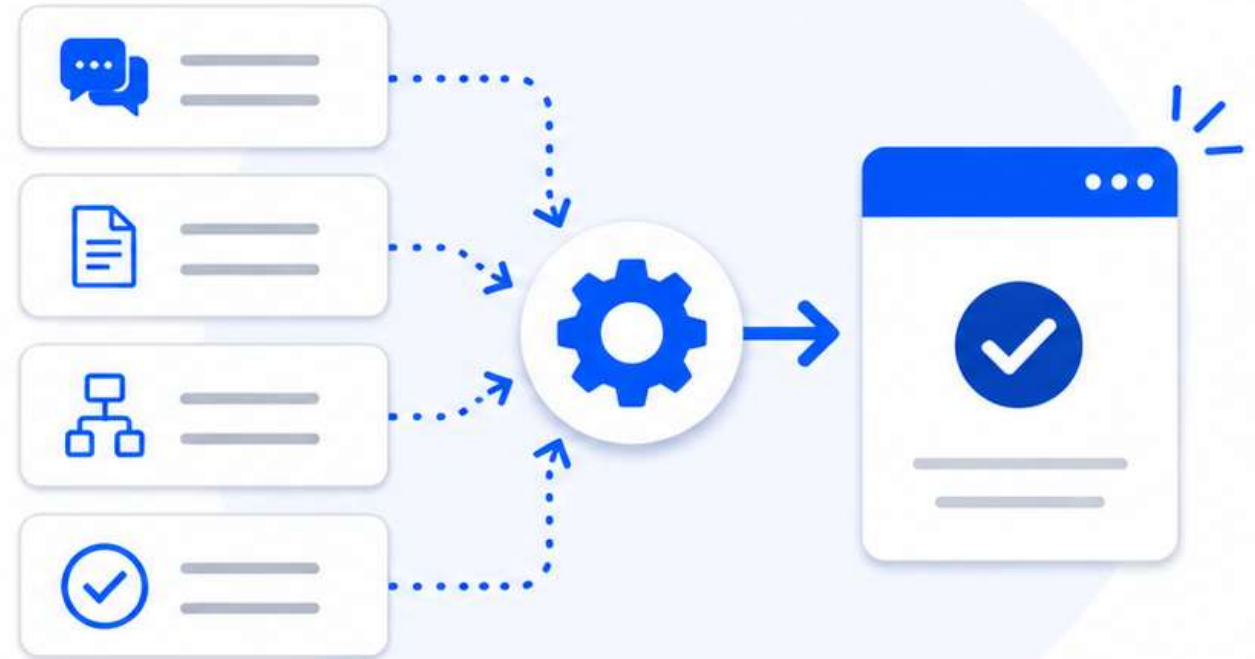
documentation



workflows



Anywhere there are repeated steps,
tools can simplify them.

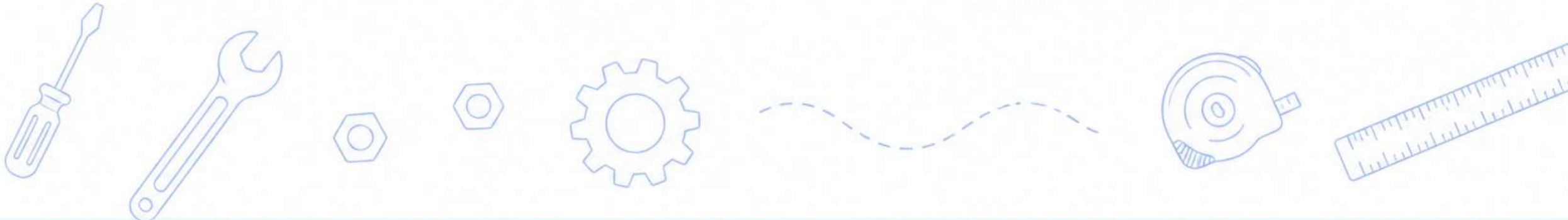
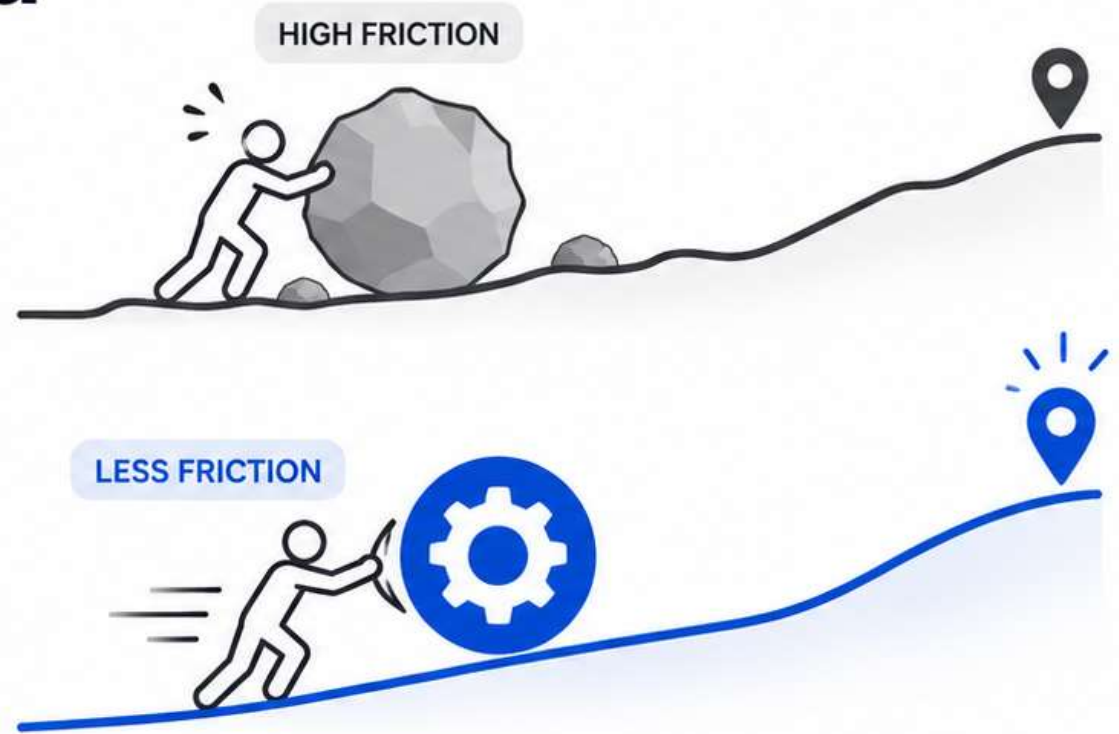


Simpler. Faster. **Better.**

Everything we've talked about today comes back to **friction**.

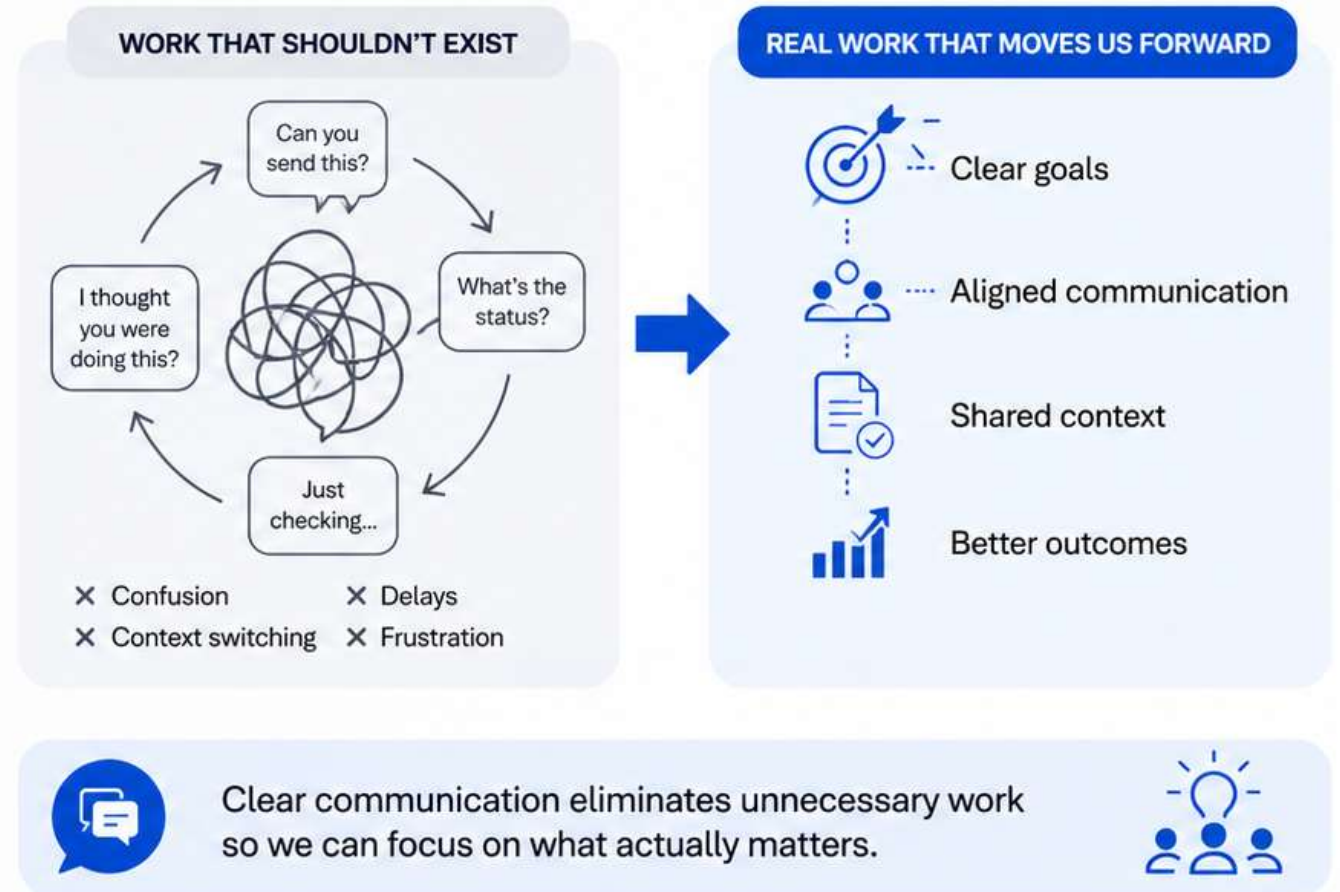


- Tools are one of the fastest ways to reduce it.



So now we've talked about removing work, outsourcing it, preventing it, and using tools to speed it up.

- But there's another category of work we haven't addressed yet.
- Work that shouldn't exist in the first place.
- A lot of the back-and-forth, confusion, and "quick questions" we deal with are not real work.
- They're created by a lack of clear communication.
- So let's talk about how communication itself can be a form of leverage.



What do you think?



Are tools an important
form of **leverage** in your agency?
And if so, is there still
room for **improvement**?

