



BenefitLab.ai

Where benefits knowledge meets practical AI.

Leverage for Insurance Agents

Part 3

Amplifying with AI



Lesson 26: From AI to Your AI:
Understanding RAG



Knowledge



Strategy



Growth

The Solution



- There is a way to **fix** that.



- It's called a **RAG**.



- That stands for **Retrieval-Augmented Generation**.



What That Means



- Instead of pulling from **general information...**



- the AI pulls from a **specific knowledge base.**



- Your **knowledge.**



Simple Idea



- AI + your information



- That's the concept.



- And it makes a huge difference.



From General to Specific



- Now instead of **generic** answers...



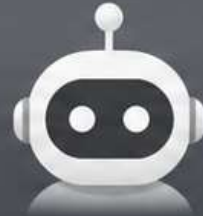
- You get answers **based on:**
 - your processes
 - your strategies
 - your content



- That's what makes it **useful**.

BEFORE

General Answers



Here's some information you can consider...



AFTER

Specific Answers



Here's the answer based on your **processes, strategies, and content**.

ANSWERS THAT ARE:



More Relevant
to your business



More Accurate
to your context



More Actionable
for your team



More Valuable
every time

This Isn't a New Idea

Before AI... people were already solving this problem.

A few decades ago, a sociologist named **Niklas Luhmann** built a simple system to manage his thinking.



90,000+ note cards

Every idea captured on a single card.



Notes linked together

A web of ideas, not a pile.



Atomic thinking

One idea per card.



Connections create insight

New ideas emerge from links he didn't plan for.



Extraordinary output

70+ books and hundreds of articles.



Zettelkasten = “card file”

How the Zettelkasten Method Works



Capture an idea on a card.



Give it a unique ID (e.g., 12a3).



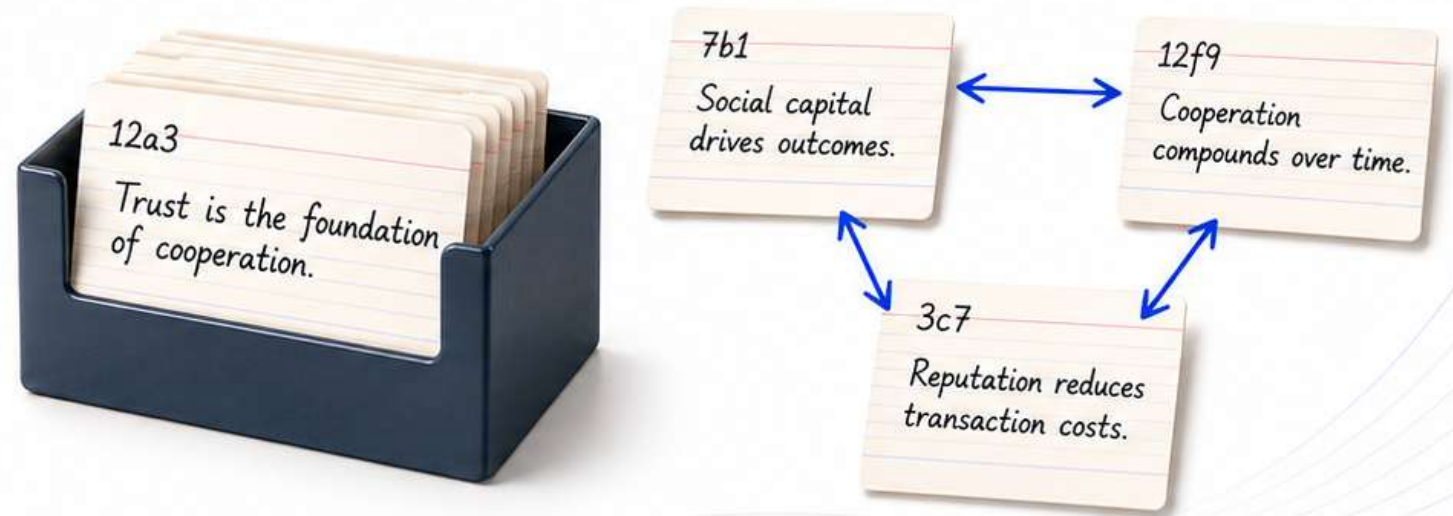
Write links to related notes on the card.



File the card in a box.



Follow links to build your thinking.



What Changed

Before



Manual connections



Now



Instant connections



You had to
find the idea



The system
finds it for you



Storage

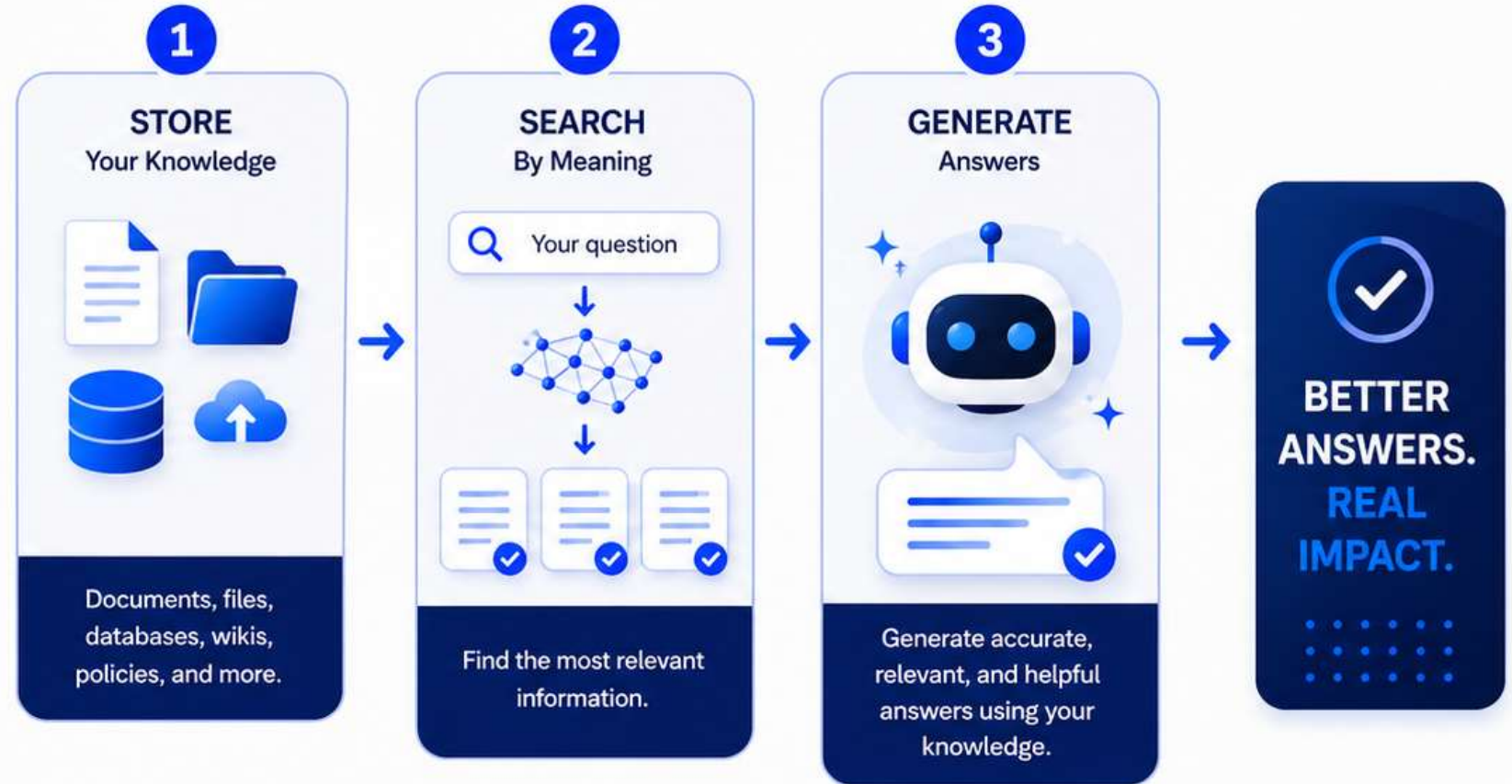
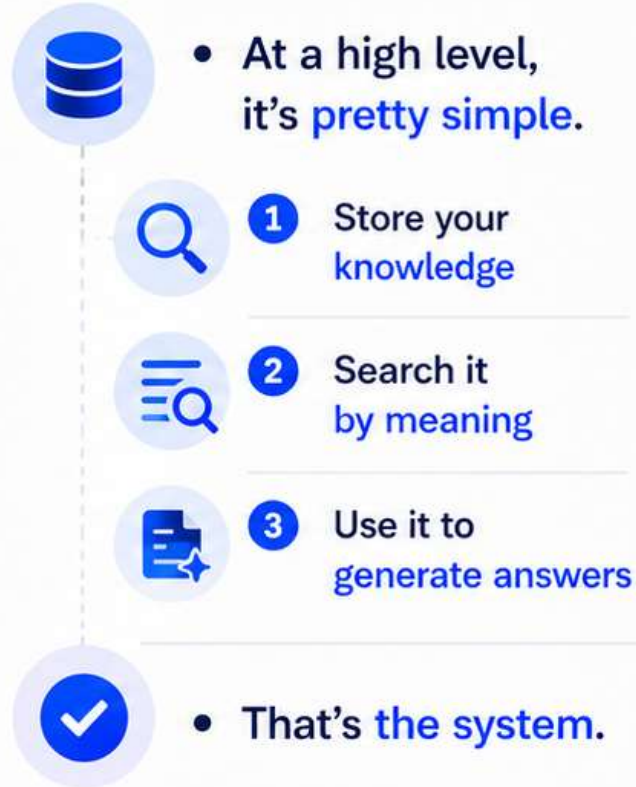


Usable
intelligence



Same concept. **Completely different power.**

How It Works



Your knowledge + AI = Smarter answers that drive better outcomes.

Search by Meaning



This is **important**.



It's not just **keyword search** – it's **semantic search**.



It understands **intent**.



So it finds the most **relevant information** based on what you're asking.



It's not about matching words.
It's about understanding meaning.



KEYWORD SEARCH

Q “onboarding checklist”

Looks for **exact word matches**.

Onboarding Checklist Template

New Hire Checklist.xlsx

Checklist (Final).docx



May miss relevant information that uses different words.

VS

SEMANTIC SEARCH

Q “How do we onboard a new employee?”

Understands **meaning and intent**.

New Hire Onboarding Process
Step-by-step guide and best practices **Most Relevant**

Employee Onboarding Strategy
Our approach and key principles **Highly Relevant**

Onboarding Checklist & Timeline
Tasks, owners, and due dates **Relevant**



Finds the **most relevant** information based on what you're asking.



Better results. Faster answers. Smarter decisions.

THIS CHANGES EVERYTHING.



MORE ACCURATE

Answers you can **trust**.



MORE RELEVANT

The **right** information, every time.



MORE CONSISTENT

Reliable results across your team.



BECAUSE IT'S BASED ON
INFORMATION **YOU CONTROL.**

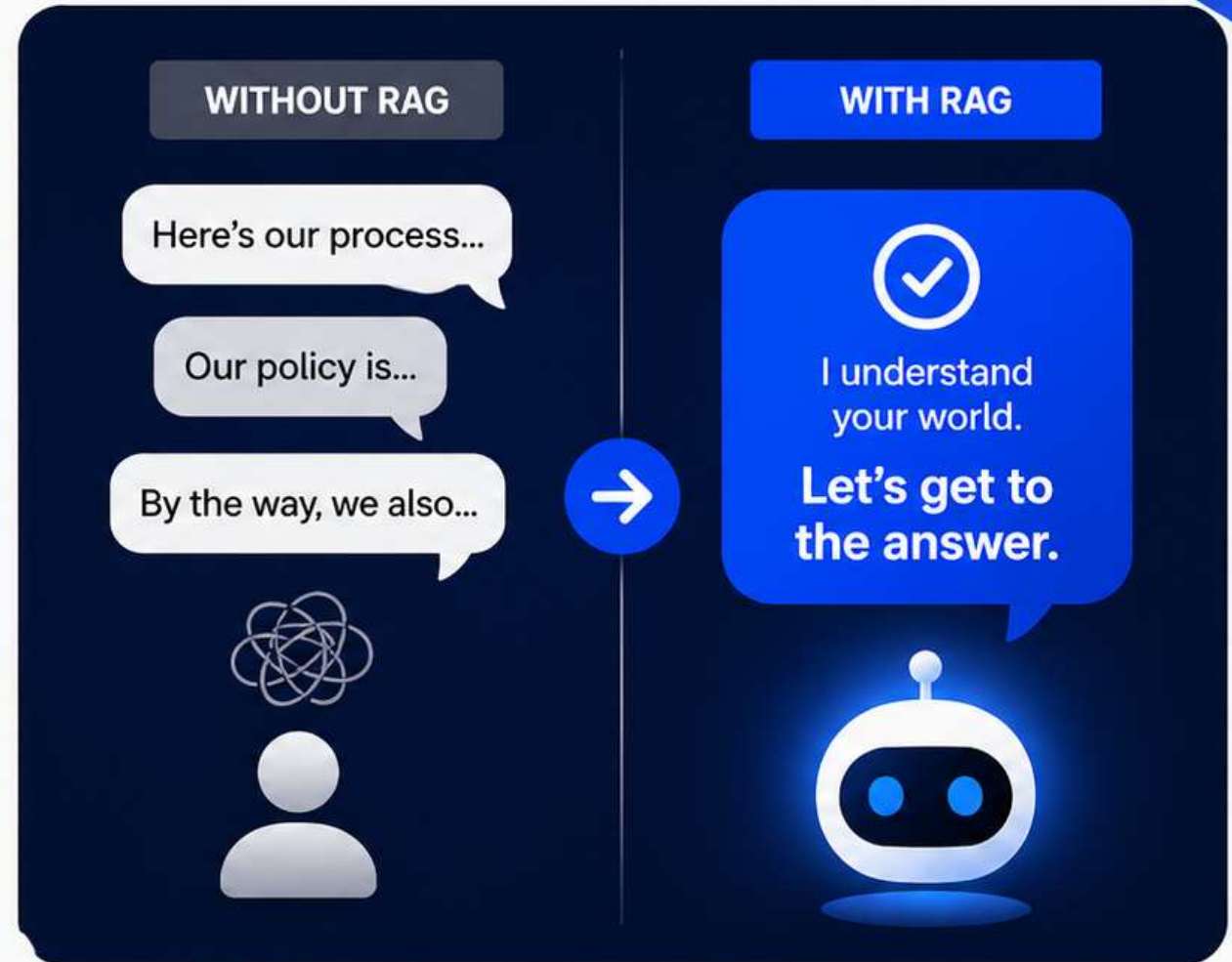
NO MORE RE-EXPLAINING.



You don't have to
explain your world
every time.



The system
already knows it.



LESS CONTEXT. **MORE CLARITY.** BETTER RESULTS.

TRUST THE OUTPUT



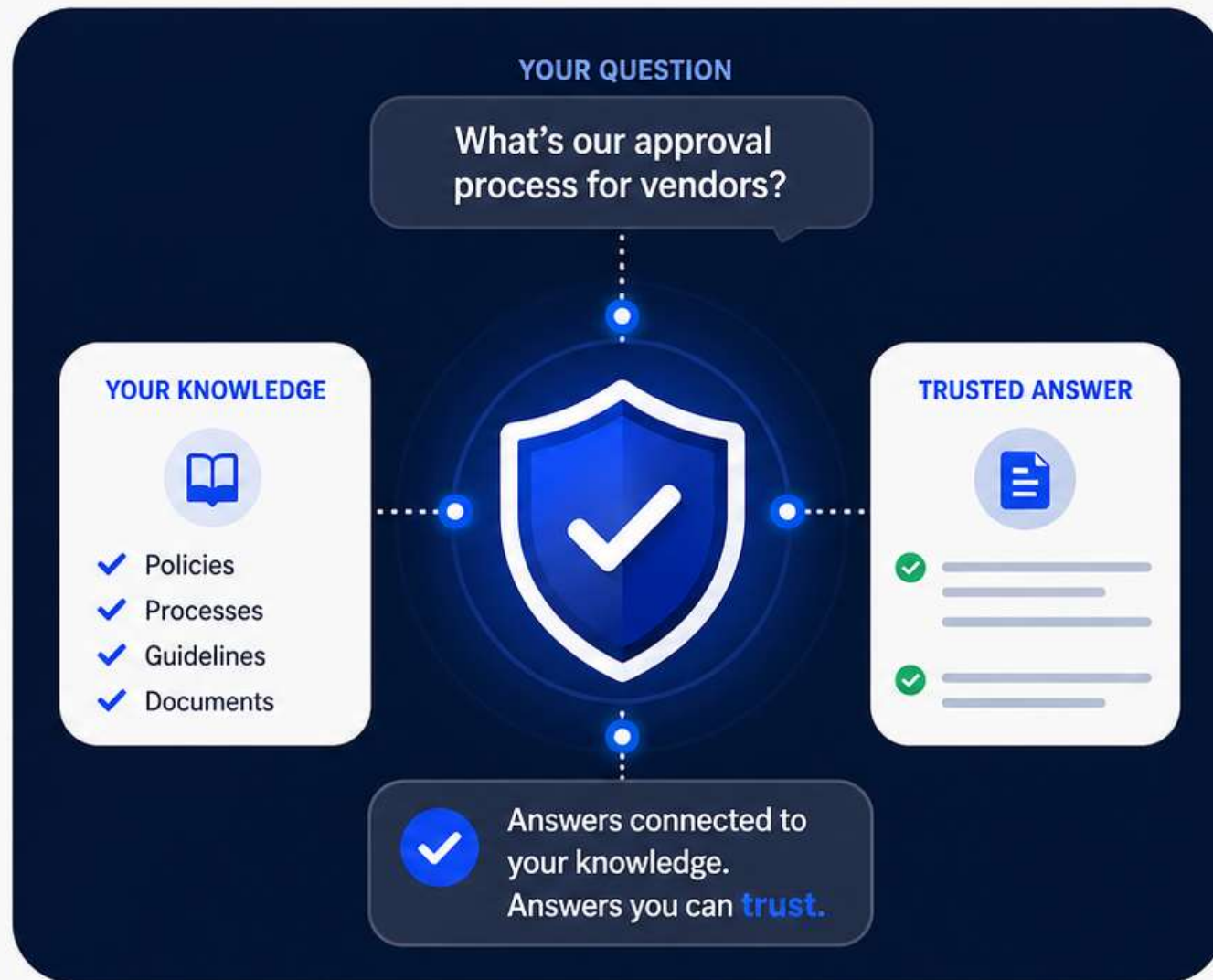
You can **trust**
the answers more.



Because they're **tied to**
your knowledge.



YOUR KNOWLEDGE.
RELIABLE ANSWERS.
BETTER DECISIONS.



ACCURATE



RELEVANT



RELIABLE

THE REAL KEY



- The AI is only as good as the **information** it can **access**.



- That's the **key idea**.



BETTER INFORMATION = BETTER ANSWERS

INPUT: INFORMATION



Your Documents



Your Data



Your Knowledge



Your Experience



OUTPUT: ANSWERS



Accurate



Relevant



Trusted



Useful



Great answers start with great **information**.

CREATE THE LOOP



1 This creates a **powerful loop**.



2 You find the **right answer**.



3 You **refine** it.



4 You **store** it.



5 And next time, you start from the **finished version**.



Capture. Improve. Build. Repeat.
That's how **knowledge compounds**.

This is what we've been **building** toward.



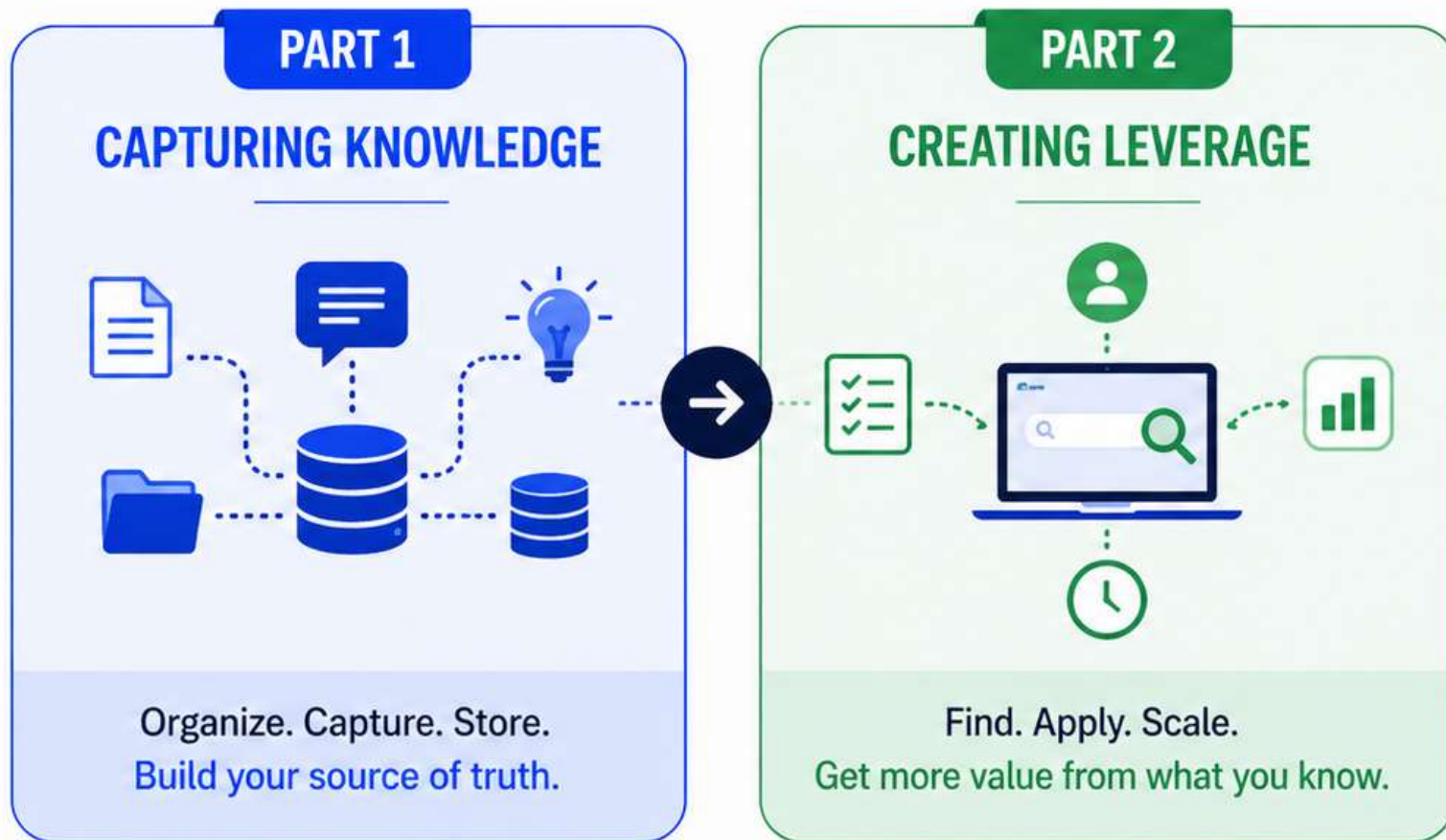
- Part 1 was about capturing knowledge.



- Part 2 was about creating leverage.



- This is what makes it **usable**.



Capture knowledge. **Create leverage.** Make it usable.

Static to Interactive



- You're taking **static** information...



- and turning it into something you can **interact** with.

STATIC INFORMATION



POLICIES



PROCEDURES



DATA



GUIDELINES



PDFS

Hard to search. Hard to use.
Easy to overlook.



INTERACTIVE EXPERIENCE

Ask anything...



What's our approval process for expenses?



Here's our expense approval process...

- ✓ Submit request
- ✓ Manager review
- ✓ Finance approval
- ✓ Payment



Easy to find



Easy to use



Easy to act on



Make your information **work for you.**

Organizing Creates Clarity



When you bring that information together:



things become **clearer**



people **align**



processes **improve**



It forces **better decisions.**

From Storage to Use

STORAGE



Store information.

Keep it safe.
Keep it organized.



The goal is not just
to **store** information.

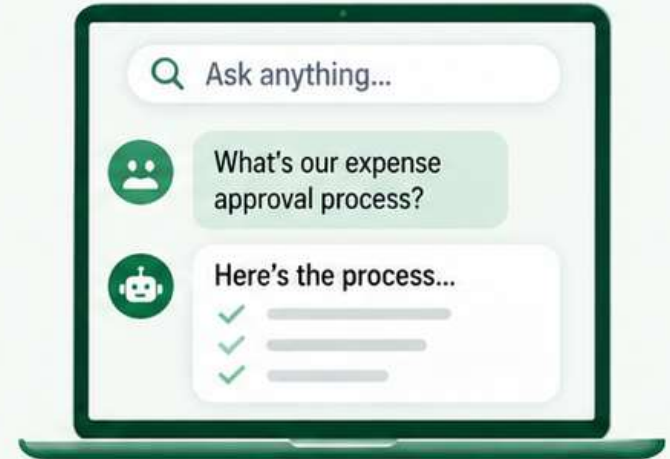


It's to **use** it.



To **interact** with it.

USE & INTERACT



Find answers



Make better
decisions



Drive results



We're not just building a library. **We're building a solution.**

What We're Building



- We're building this concept into a **working system**.



- It's called the **Benefits RAG**.



Insurance Knowledge



Strategies



Carriers



Compliance



FAQs



One intelligent source of insurance industry knowledge.
Built for **our industry**. Built to **help you**.

Curated Sources



- This is built from **curated** material.
-  ComedyCE.com
-  ComplyDIY
-  HealthInsuranceFAQs
-  Benefits Weekly



- Not random internet content.



ComedyCE.com



ComplyDIY



HealthInsuranceFAQs



Benefits Weekly

While the knowledge base I'm creating allows you to **read Eric's mind**, the Benefits Rag allows you to **pick Eric's brain**.



The problem, as I said before, is that I can't read your mind.



That's where you come in.

?

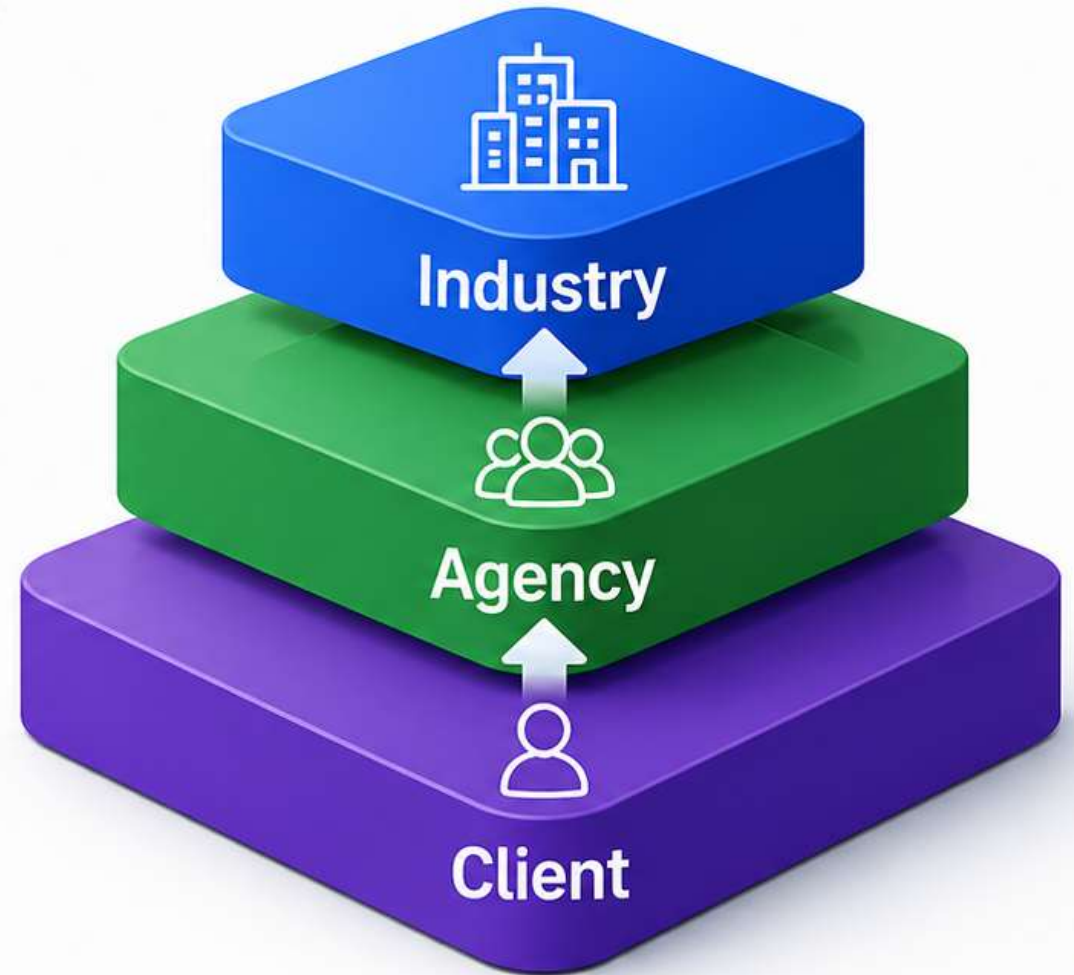


Three Layers of Knowledge

-  Industry
-  Agency
-  Client



- Each layer builds on the one before it.



Industry Layer



- The Benefits RAG covers the industry (or you could build this layer yourself).



- It gives you structured knowledge about strategies, compliance, and real-world scenarios.



- And it will continue to grow and get smarter.



Agency Layer



- Your agency layer includes how you do things.
 - Processes.
 - Preferences.
 - Standards.



- This is your **playbook**.



- It's how you interact with your agency knowledge base that we talked about day one.



Client Layer



- Then you have client-specific knowledge.
 - Plan details
 - History
 - Notes



- Now everything is connected.



Why This Matters



- Instead of searching everywhere...



- you're working inside a system.



Consistency Across the Team



- This is especially important for agencies.



- Without a shared system, everyone works differently.



- With it, everyone is aligned.



Key Takeaway



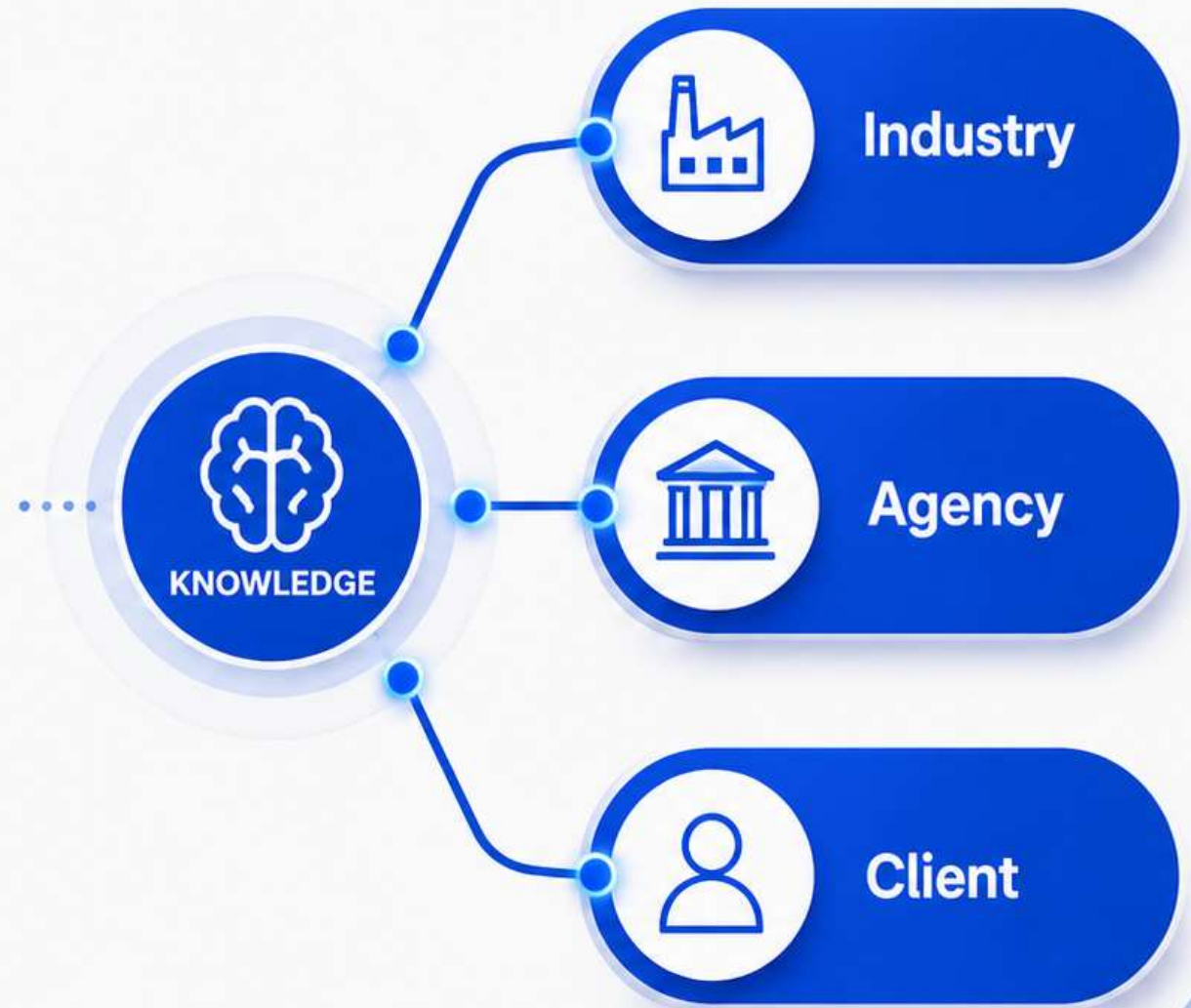
- AI becomes exponentially more powerful when it is connected to your knowledge.



- The value is not just the tool.



- It's the information.



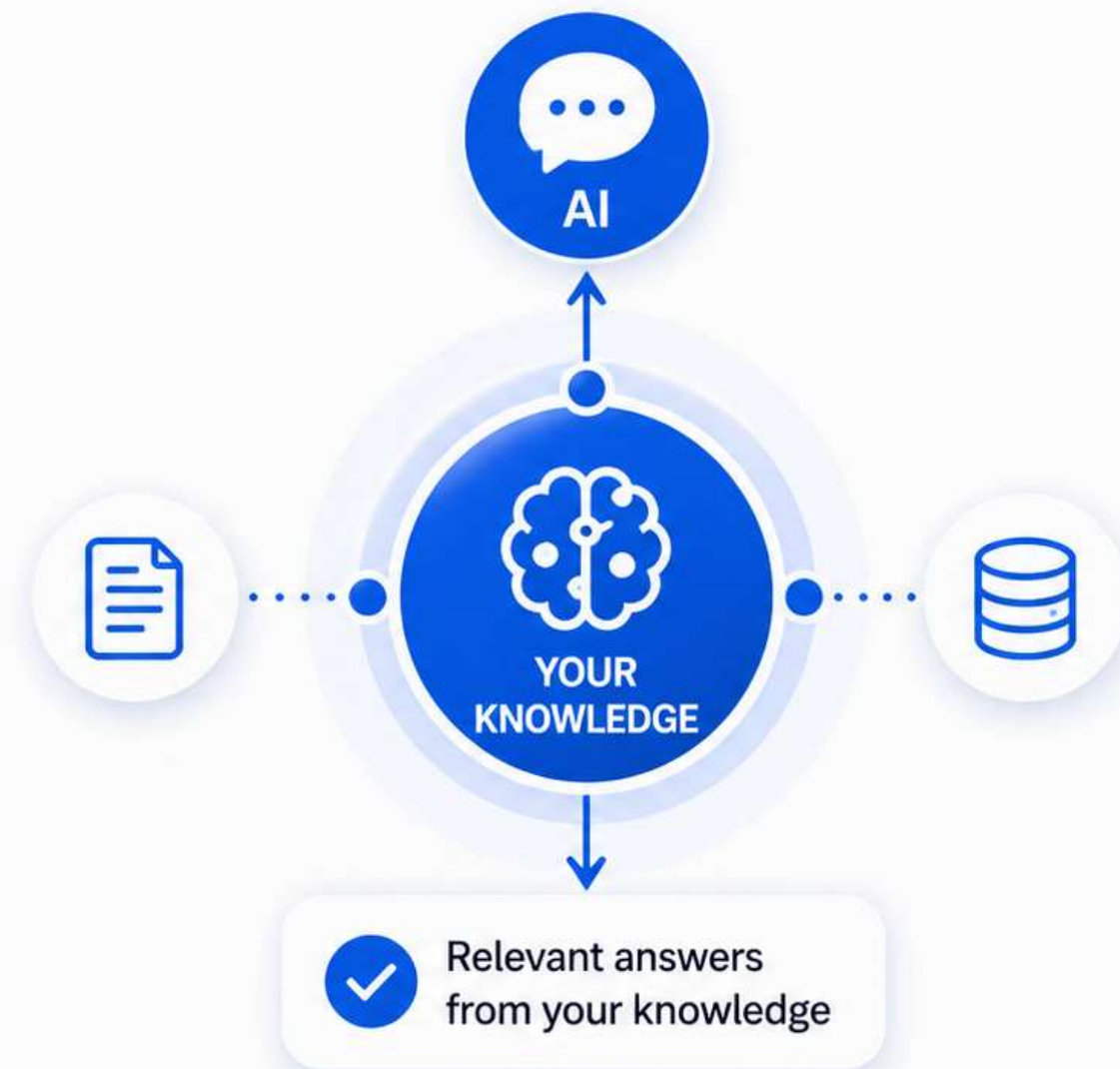
So that's the concept.



- AI connected to your knowledge instead of general knowledge.



- That's what a RAG is.



How It Works

We put everything into a knowledge base

- Then embedded it into a vector database
- (put it in a machine-readable format so AI can find it through semantic search)



How It Finds the Right Answer



- It doesn't search for exact words. It searches for **meaning**.



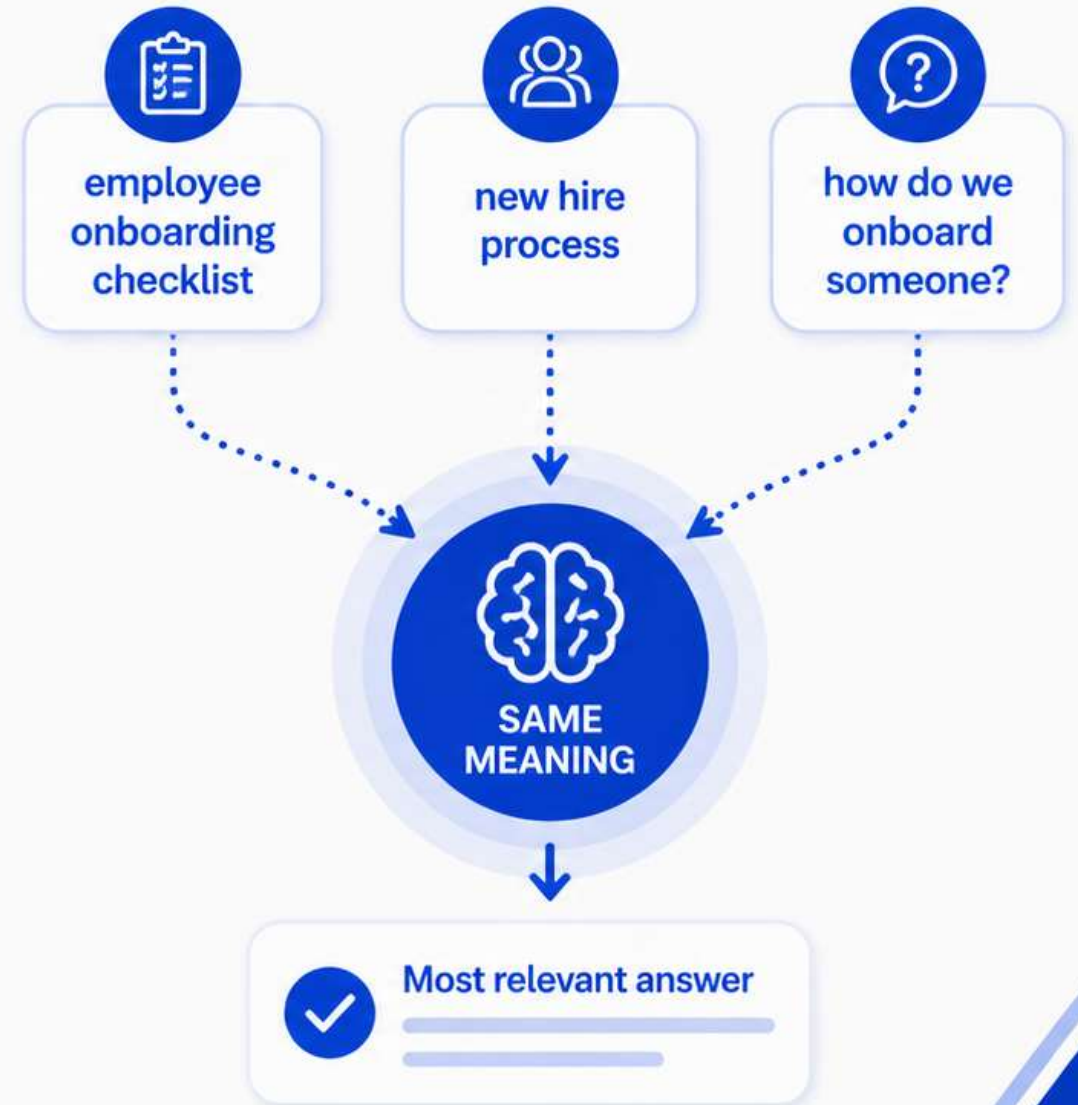
- Your content is turned into **embeddings** (a way for AI to understand what things mean).



- When you ask a question:
→ it finds the **closest meaning**, not just matching keywords.



- That's why it finds the **most relevant answer**.



What This Replaces

- Think about what this replaces.



Searching Google



Digging through emails

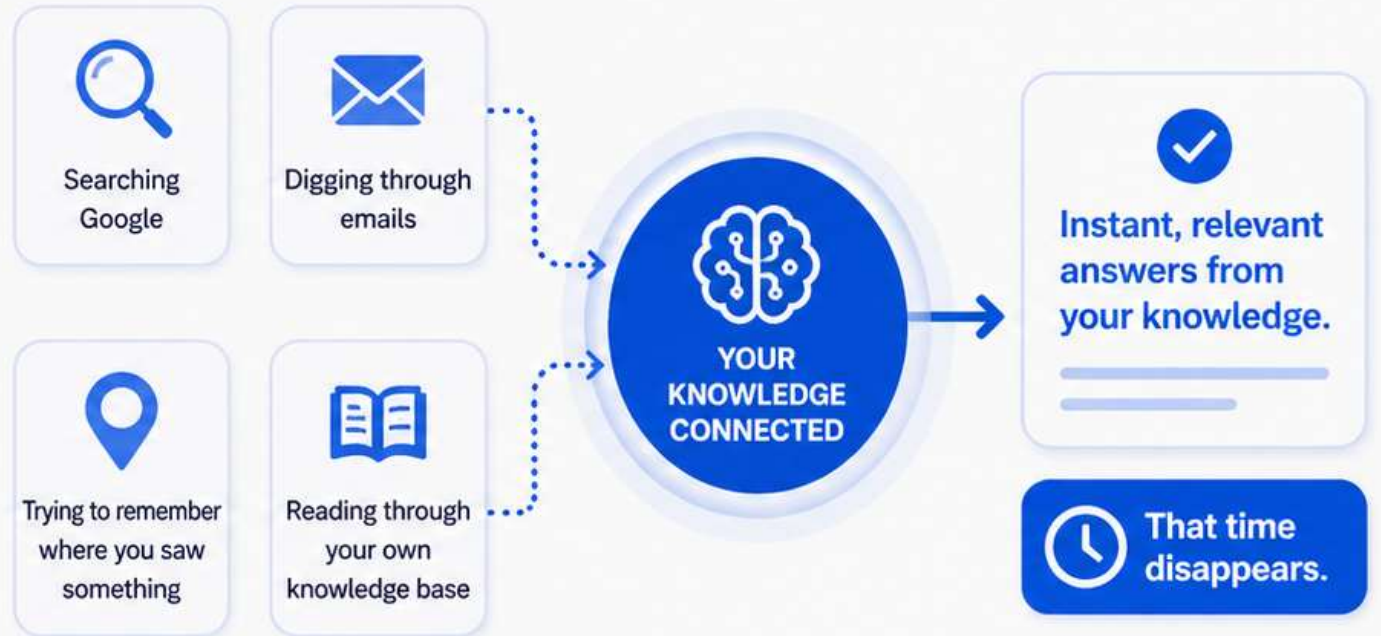


Trying to remember where you saw something



Even reading through your own knowledge base

- That time disappears.



More Reliable Output



One of the advantages of this approach is reliability.



Less chance of hallucinations



If it doesn't know, it says so



It's not trying to guess.



It's working from information you've provided.



That's especially important in this industry.



You need answers you can trust, not just answers that sound right.

