



BenefitLab.ai

Where benefits knowledge meets practical AI.

Leverage for Insurance Agents

Part 3

Amplifying with AI



Lesson 27: The Future: Agentic AI



Knowledge



Strategy



Growth

The Next Step

- The next step is this:
- AI actually doing the work.



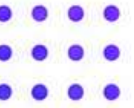
What **Agentic AI** Is

- Agentic AI connects AI to tools and systems.
- So it doesn't just generate answers.
- It **takes action**.

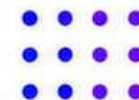


Why Not Just Use Your Notes?

- Some of you might be wondering...
- if you've already built an agency and client knowledge base in something like WorkFlowy...
- why can't you just use that?



The Limitation



The issue is not having the information.



It's how it's structured.



AI can't interact with unstructured notes



It needs to be in a format it can search and understand.



That's why it needs to be put into **atomic chunks** and tagged with **meta data** and **embedded** and **vectorized** and put into a **RAG system**.



UNSTRUCTURED NOTES

Hard for AI to use



Scattered, inconsistent, and hard to search.

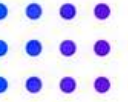


STRUCTURED & SEARCHABLE

Easy for AI to understand



Embedded, vectorized, and stored in a **RAG system** for powerful AI interaction.



But Once It Is...

- Once it's structured, now the AI can **actually work** with it – not just respond to it.

BEFORE: UNSTRUCTURED

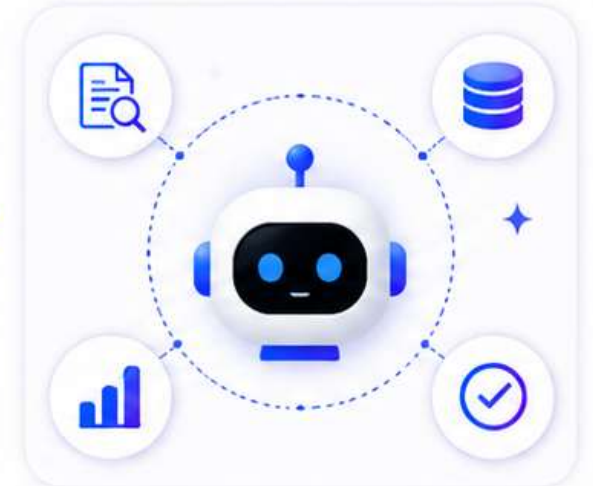
AI can't effectively use it



Hard to search, hard to understand, limited AI value.

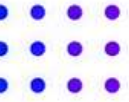
AFTER: STRUCTURED

AI can actually work with it



AI can search, understand, and take action.

From Answers to Action



- Up to now, you've been asking questions.



- Getting answers.



- Then doing the work yourself.



- Agentic AI **changes that.**

THE OLD WAY



Ask a question
You ask.



Get an answer
AI responds.



Do the work yourself
You take action.

More steps. More time. More effort.



THE AGENTIC WAY



Understands
what you need



Uses tools
& systems



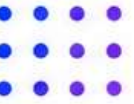
Takes action



Delivers results
you can use

Fewer steps. More impact. Real outcomes.

Example: Compliance



Compliance is complex. **Agentic AI** makes it manageable.



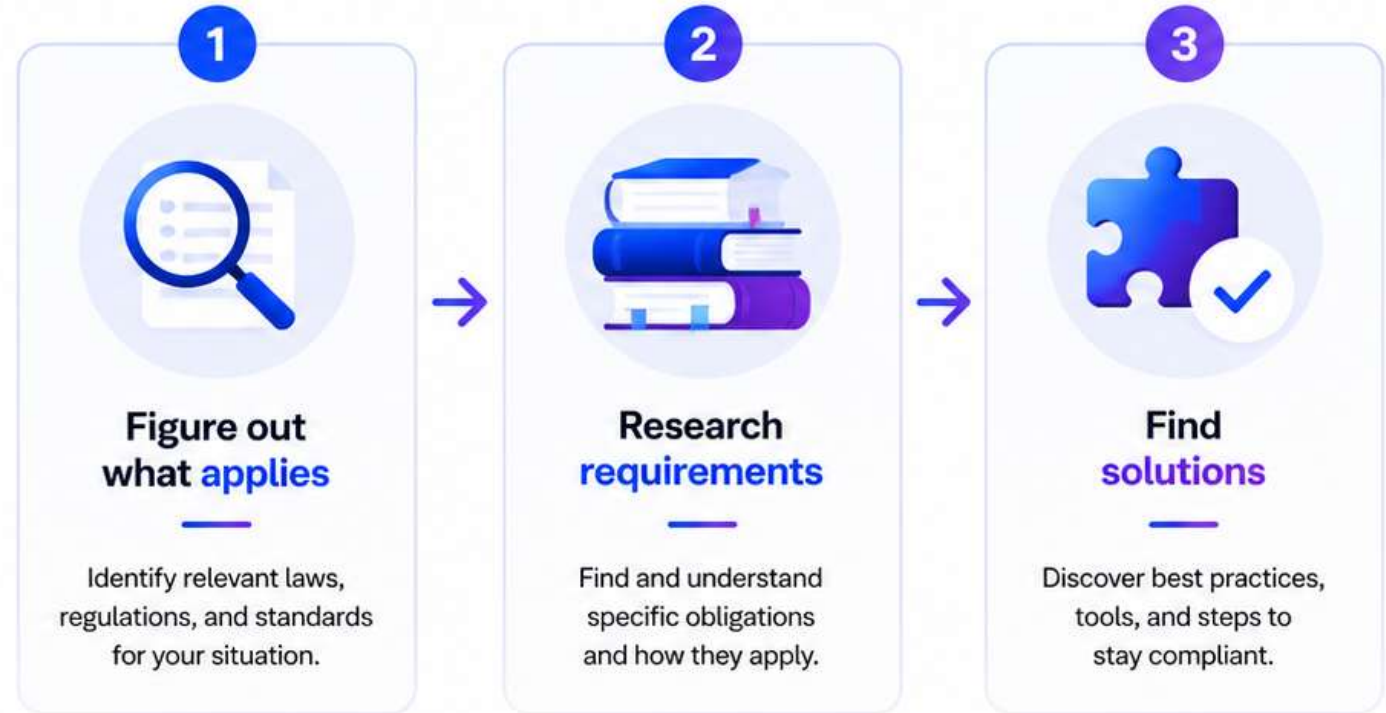
- Think about compliance.



- Today, this involves:
 - figuring out what applies
 - researching requirements
 - finding solutions

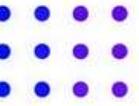


- That's a lot of manual work.



Agentic AI connects the dots, does the work, and gets you to action—**faster and with confidence.**

What **Agentic AI** Could Do



- Identify what applies



- Generate a checklist



- Recommend solutions

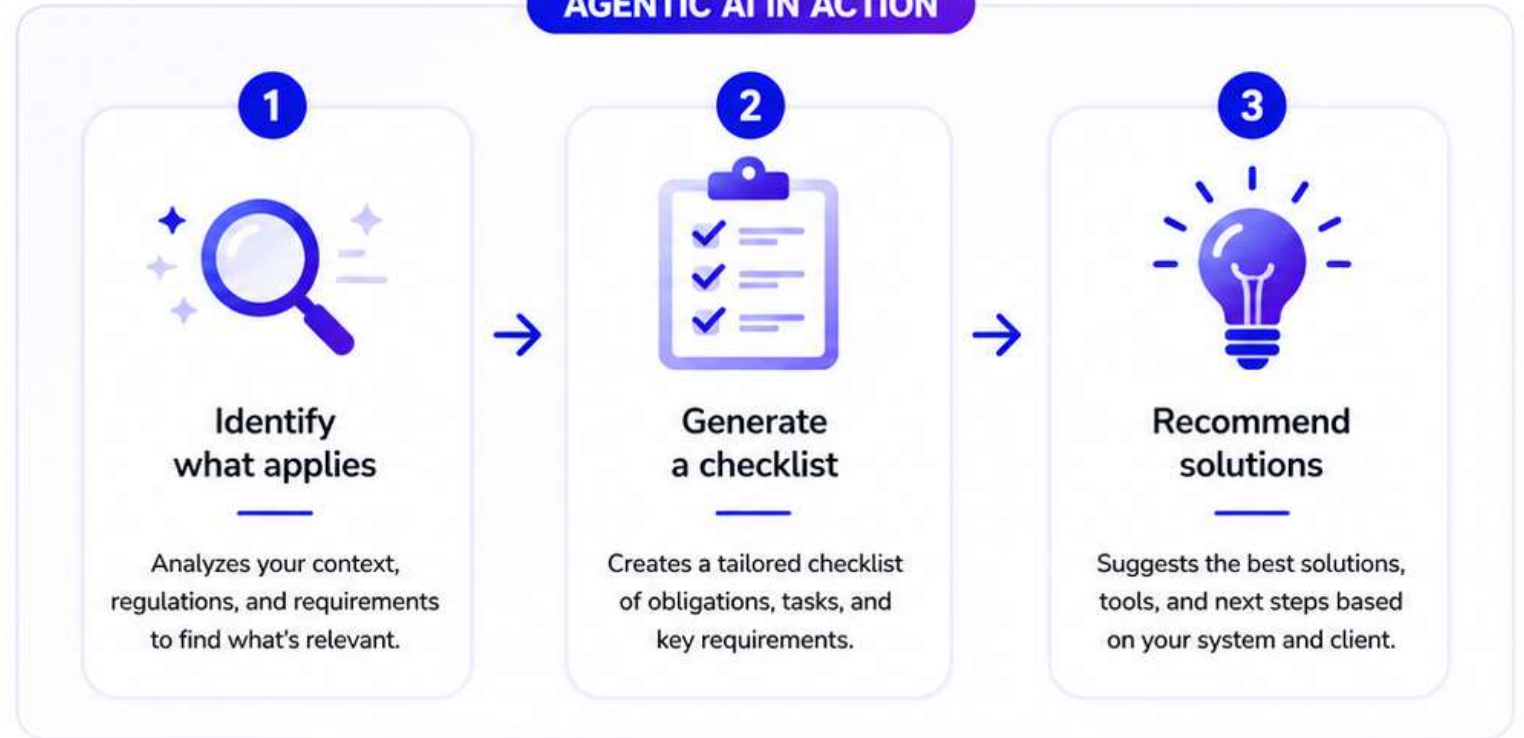


- Based on the client and your system.



- That work starts to happen automatically.

AGENTIC AI IN ACTION



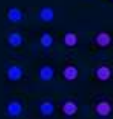
Personalized to you

Every recommendation is tailored to **your client** and **your system**.



Work that happens automatically

The work starts to happen **automatically**—saving you time and driving better outcomes.



Now let's **zoom out** for a second.

- So far, we've looked at individual examples.
- Quoting.
- Compliance.
- Specific tasks.



QUOTING



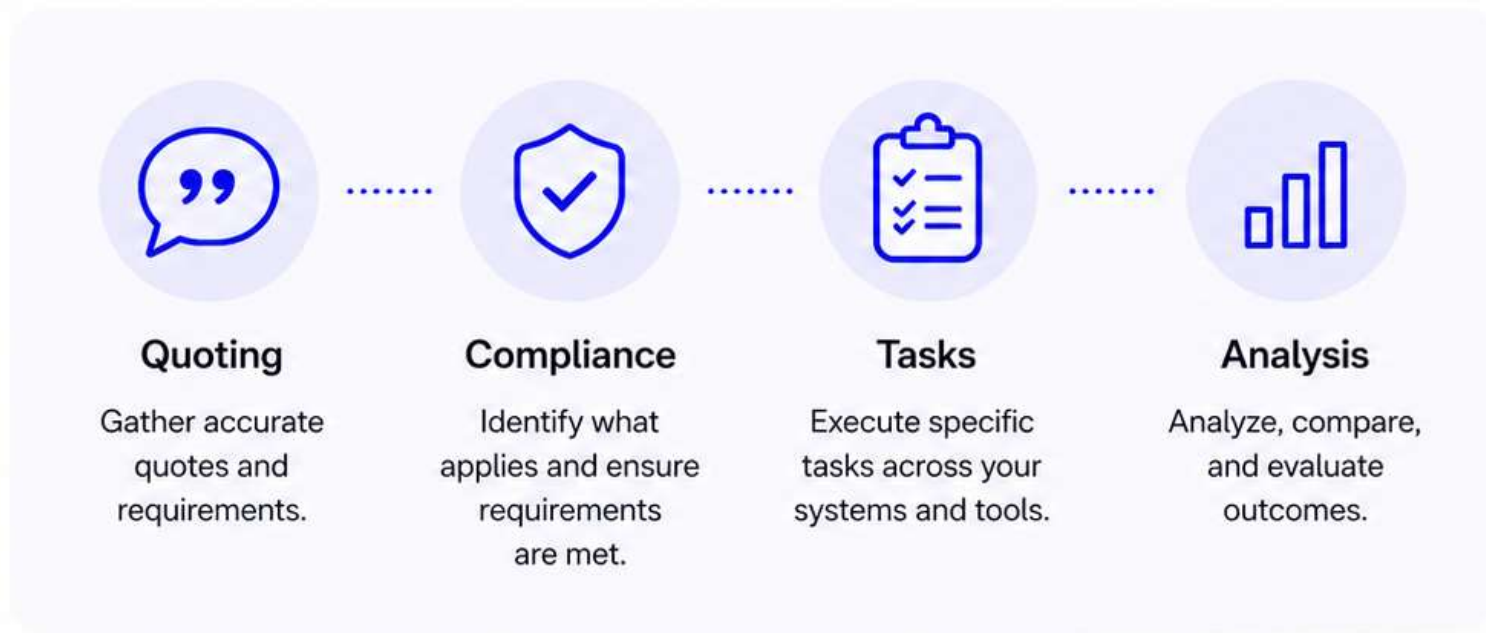
COMPLIANCE



SPECIFIC TASKS

The Bigger Picture

- But the real opportunity is not just doing one task.
- It's **connecting everything together**.



Now **Imagine This**

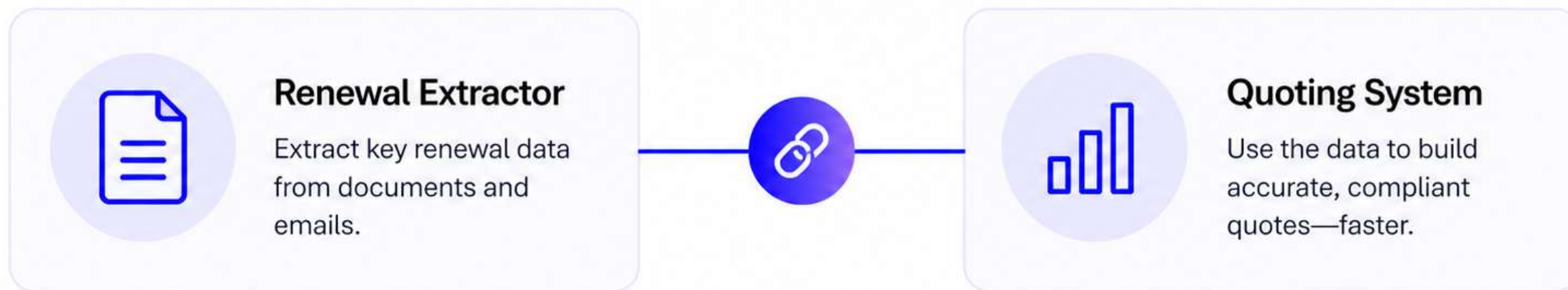
- You have:
 - industry knowledge
 - agency knowledge
 - client knowledge



All in a **RAG system.**

Connect It **to** Tools

- Now connect that to your tools.
- Like the renewal extractor and your quoting system.

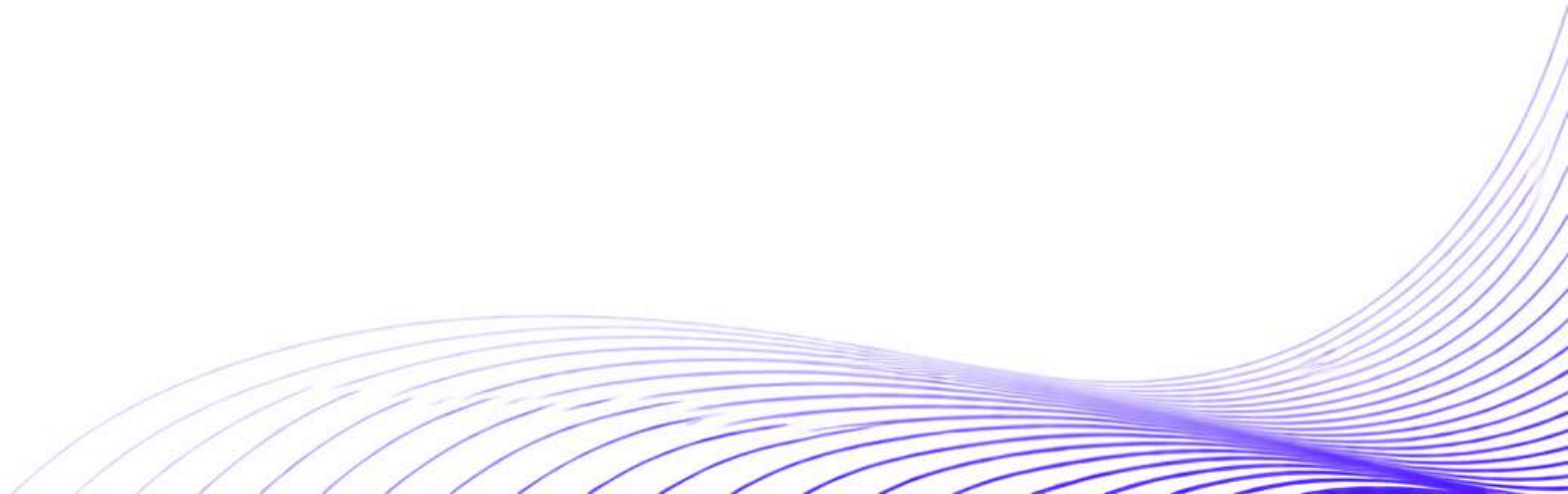


What Happens Next

1. You upload a renewal.
↓
2. Extractor tool pulls out relevant info in human and machine-readable format.
↓
3. That becomes input for the quoting tool, which automatically runs the quotes, identifies comparable plans from current carrier and other carriers and generates quotes in end-user format and in machine-readable format.
↓
4. The AI tool analyzes the options and pulls in agency and client preferences.
↓
5. The AI tool makes customized recommendations for the client that sound like they're coming from you (because they're based on your thinking).

This Is the Shift

- Now you're not just getting answers.
- The system is starting to think the way you think.



Think About **the Impact**

- If a system could take **all** of that information...
 - and analyze it the same way you would...
 - how much **time** would that save you?
- 
- A decorative graphic consisting of numerous thin, overlapping, wavy lines in a light blue color, located in the bottom right corner of the slide.

The Future is
Closer Than
You Might Think

—.



Many of the pieces already exist

- The tools are here.
 - The AI is here.
 - The missing piece is structure.
 - That's what we've been building for three days.
- 
- A decorative graphic consisting of numerous thin, curved, wavy lines in a light blue or purple hue, located in the bottom right corner of the slide.

You Can't Skip Steps

- This only works if the foundation is in place.
 -  Organized knowledge
 -  Clear processes
 -  Defined systems
- Without that, it falls apart.

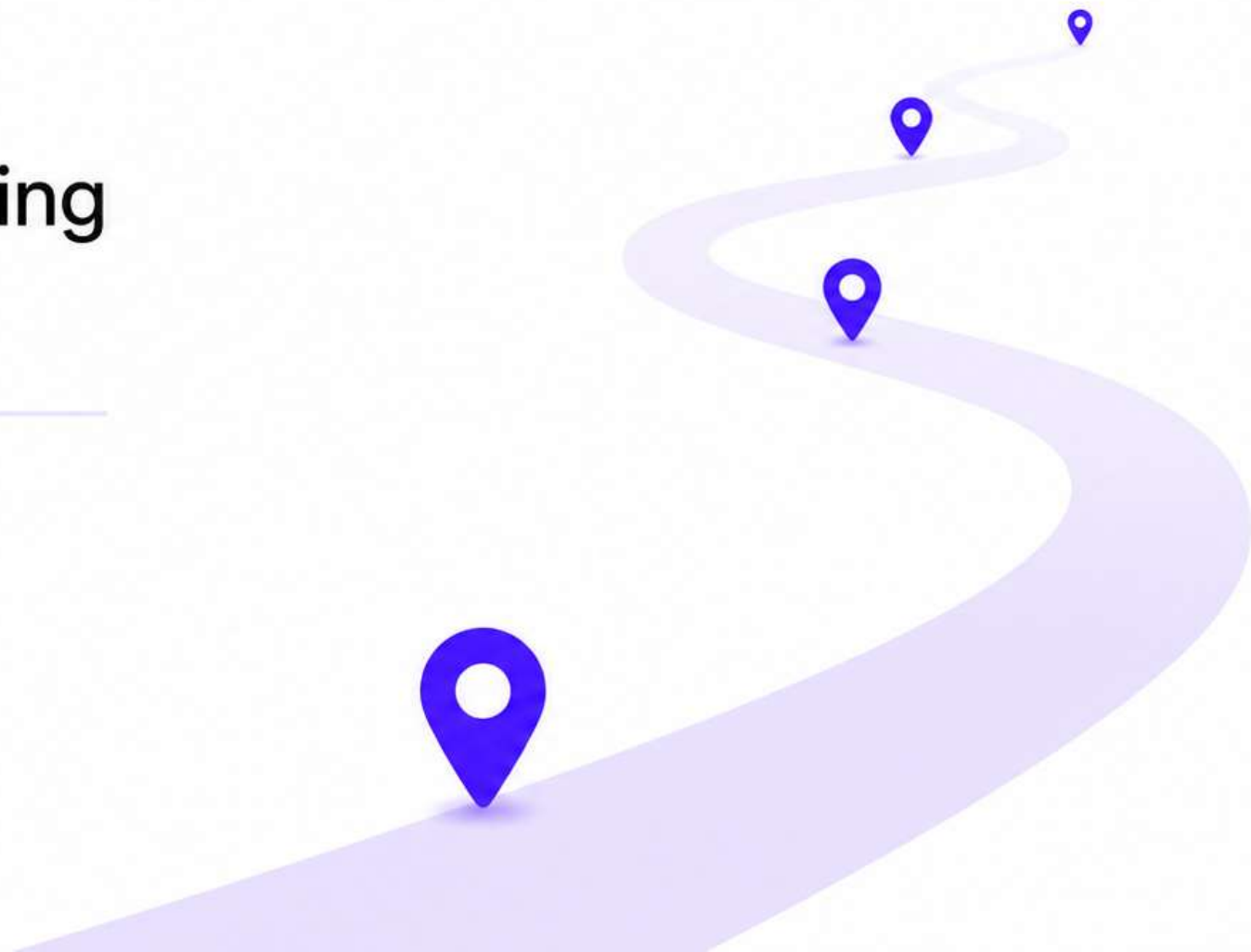
Not a Shortcut



This is not something
you jump to.



It's something
you **build** toward.



What This Means for You



The agents who prepare for this will have a **major advantage**.



Because they'll be **ready** to use it.



“

Skate to where
the puck is going,
not where it has been.”

— Wayne Gretzky

So now we've gone from:

- using AI...
- to building systems...
- to what's coming next.
- Let's bring this all together.



**Any
Questions
First?**