



BenefitLab.ai

Where benefits knowledge meets practical AI.

Leverage for Insurance Agents

Part 1

Building Your Foundation



Lesson 5: Building Your System in WorkFlowy



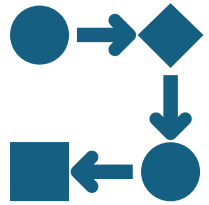
Knowledge



Strategy

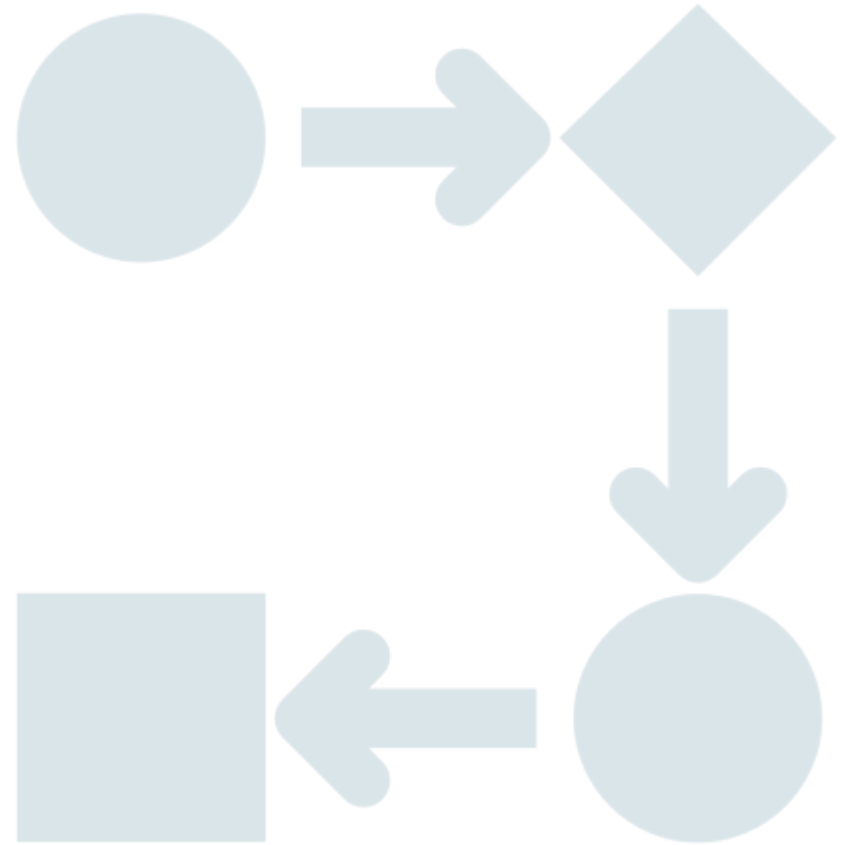


Growth



Moving from Theory to Reality

You need a place to actually
build this.



Why You Need a System

You cannot keep this in your head.

You cannot rely on memory.

And you can't rely on scattered storage.

- Folders
- Emails
- Random documents

That's where things get lost.

One Place

You need one place:

- Organized
- Searchable
- Expandable

A system that grows over time.



Workflowy

<https://workflowy.com>



Workflowy: A simpler way to organize your work

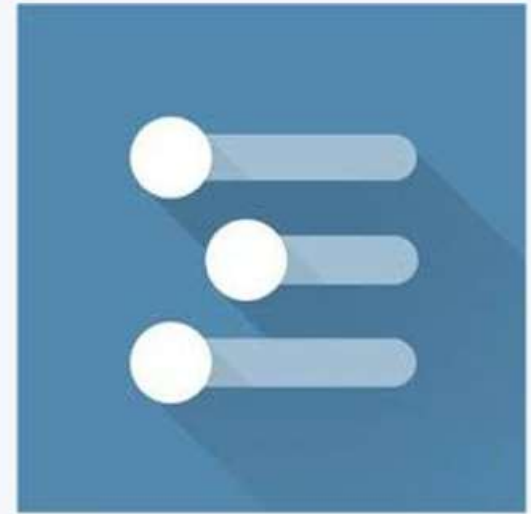
If you have a crazy job or an ambitious project, we will be your trusty sidekick. **Workflowy** is a simpler way to stay organized.

Introducing WorkFlowy

- There are a lot of tools you could use.
 - Notes apps.
 - Documents.
 - Databases.
- But WorkFlowy works particularly well for this.

Why Workflowy is great for organizing knowledge

- Because it's outline-based
- And knowledge is hierarchical



WorkFlowy

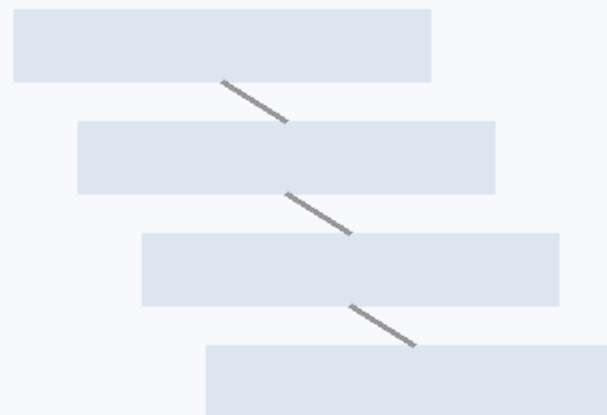
Organize your brain.



How You Think

- You have high-level ideas
- with detailed layers underneath
- That's how you think
- And that's how you retrieve information

Hierarchy / Outline



What It Lets You Do



Build nested structure

Organize ideas inside ideas.



Zoom in and out

Focus or step back instantly.



See big picture and detail

Without losing context.



That's a powerful combination.



Build Your Knowledge Base



- You can create structure:



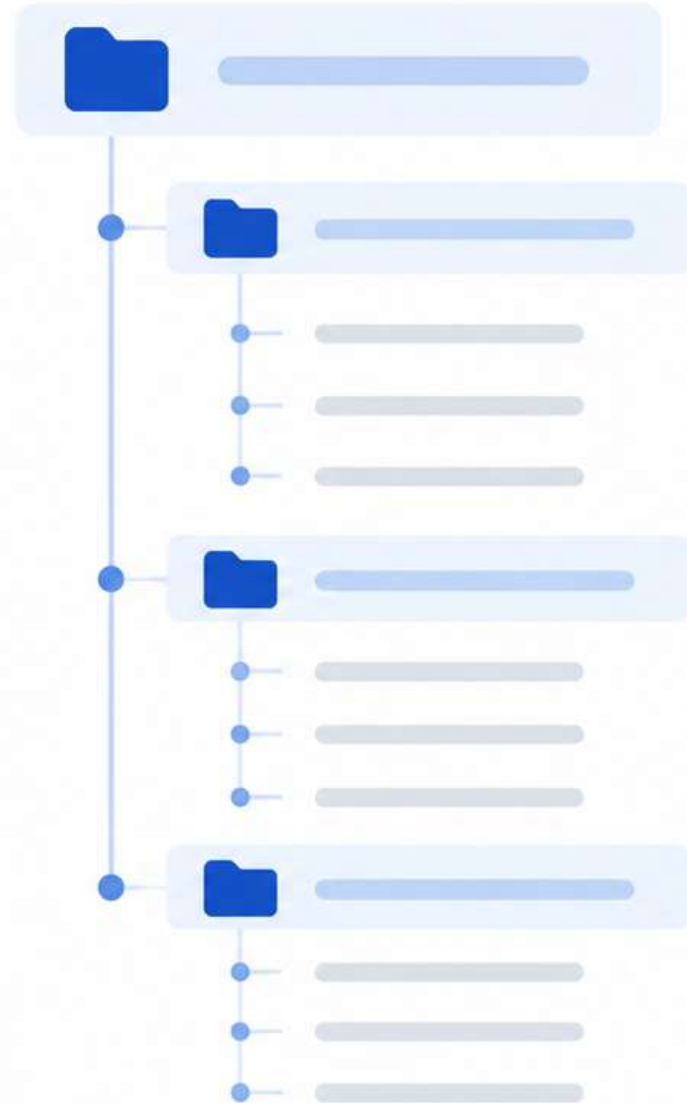
Categories at the top



Details underneath

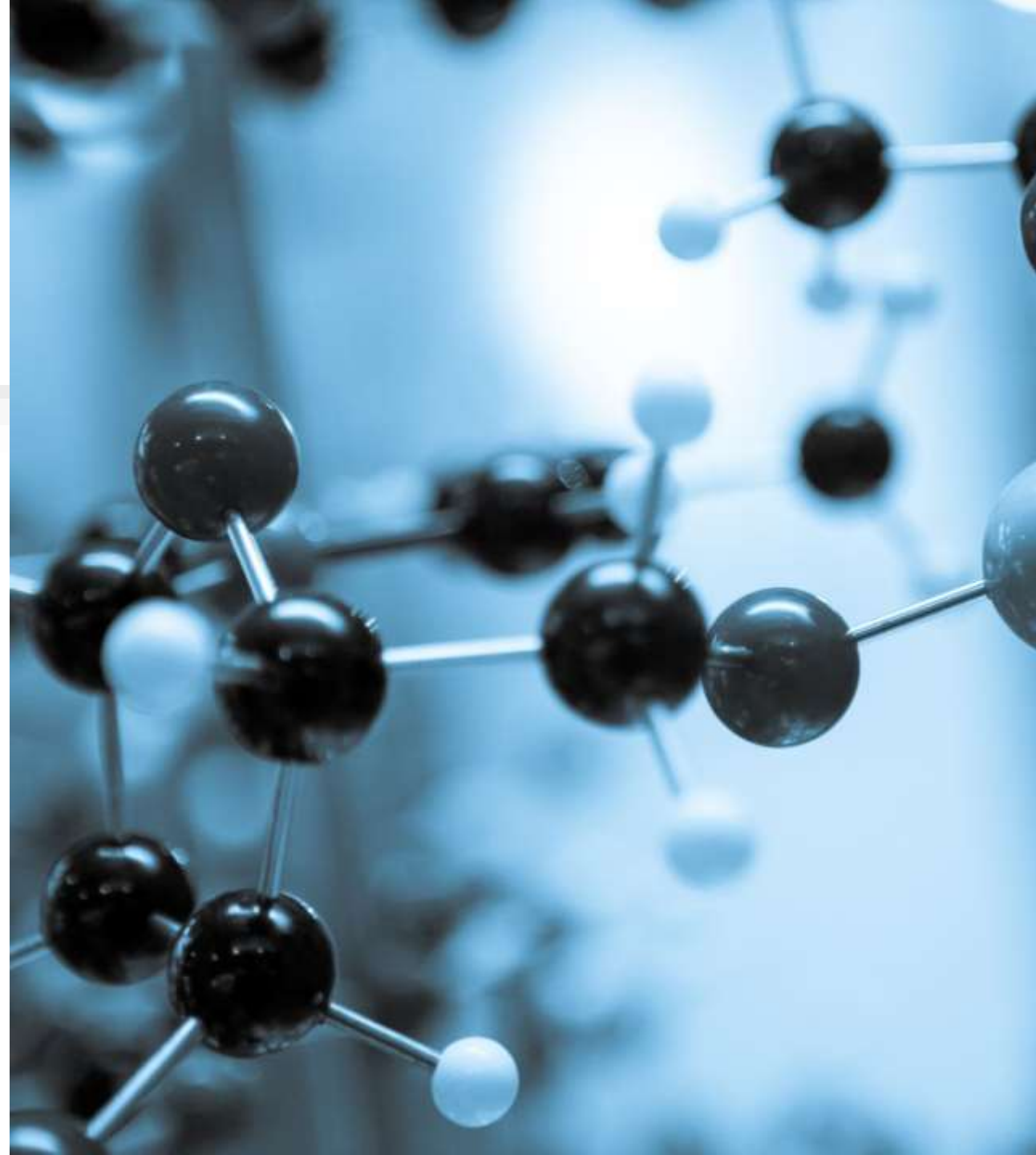


- This becomes **your system**.



Capture Atomic Chunks

- This is where atomic chunks come in.
 - Complete thoughts
 - Fully explained ideas
 - Reusable information
- Not partial notes.



Find Things Fast



Instead of digging through folders...



you can retrieve information quickly.



when you need it.

Connect to
Everything

You can also link to external resources.

Documents.

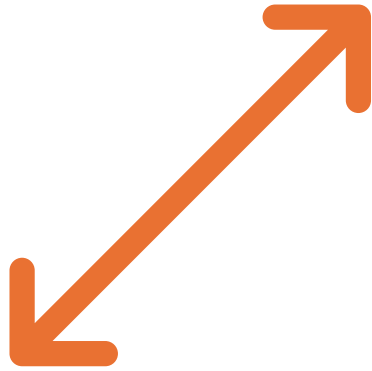
Spreadsheets.

Websites.



Everything connected.

This Grows With You



And you can keep
expanding it...



without breaking the
structure.

The value is
not the tool.

The value is the
structure.

Workflowy just
makes it easier
to maintain.

● LIVE DEMO

Build the System

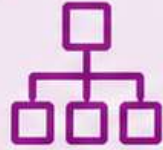
Let me show you what this looks like.

Start with Structure





Then build underneath:



Subcategories.



Detailed entries.



Real content.

Store Atomic Chunks

- ✓ Capture each note as a complete idea.
- ✓ Something that stands on its own.
- ✓ This will make it easier to find later, easier to understand without additional context, and easier to recombine into answers to client questions, content of different types, really anything you want.



Capture Each Note as a Complete Idea

Write notes that express one complete thought.



Stands on Its Own

Each chunk should make sense by itself.



Easy to Find and Understand

No extra context needed to get the point.



Easy to Recombine and Use

Mix and match chunks to answer any question.

This is why atomic chunks matter.



If your notes are incomplete,



if someone else cannot read
them and instantly understand,



they're not useful later.



Reusable



Searchable



Shareable

Complete = Reusable

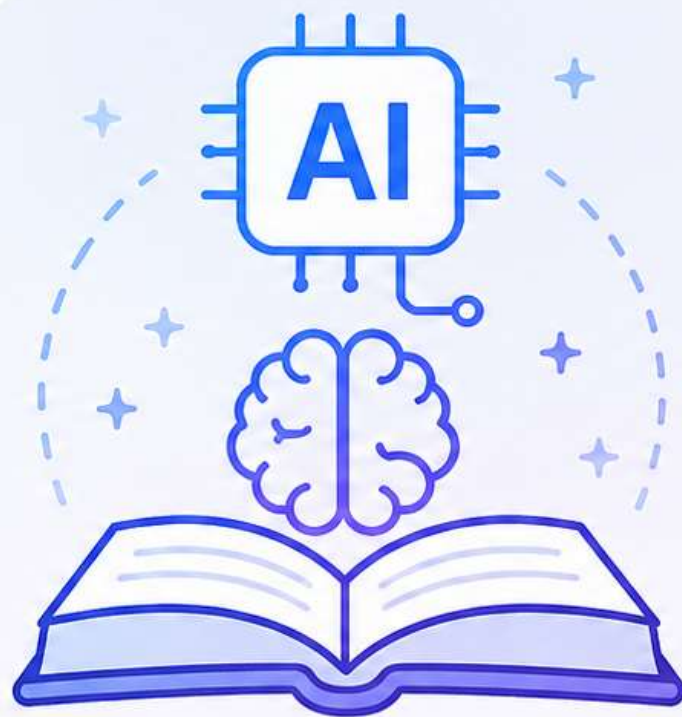
- If your notes are complete:

- ✓ Reusable
- ✓ Searchable
- ✓ Shareable

- That's what makes them valuable.

This is not just for **you**.

- This is how you prepare your knowledge for **AI**.



AI Needs Structure



AI works best with:



Structured information



Complete thoughts



Clear definitions



That's what **you're building.**



Key Takeaway



The goal is
not to use
WorkFlowy.



The goal is to
build a
system.



WorkFlowy
just makes it
real.

Now that you have a place to **build this...**



Let's talk about
what **actually** goes into it.



Starting with the
agency knowledge base.

