



BenefitLab.ai

Where benefits knowledge meets practical AI.

Leverage for Insurance Agents

Part 1

Building Your Foundation



Lesson 8: The Full System



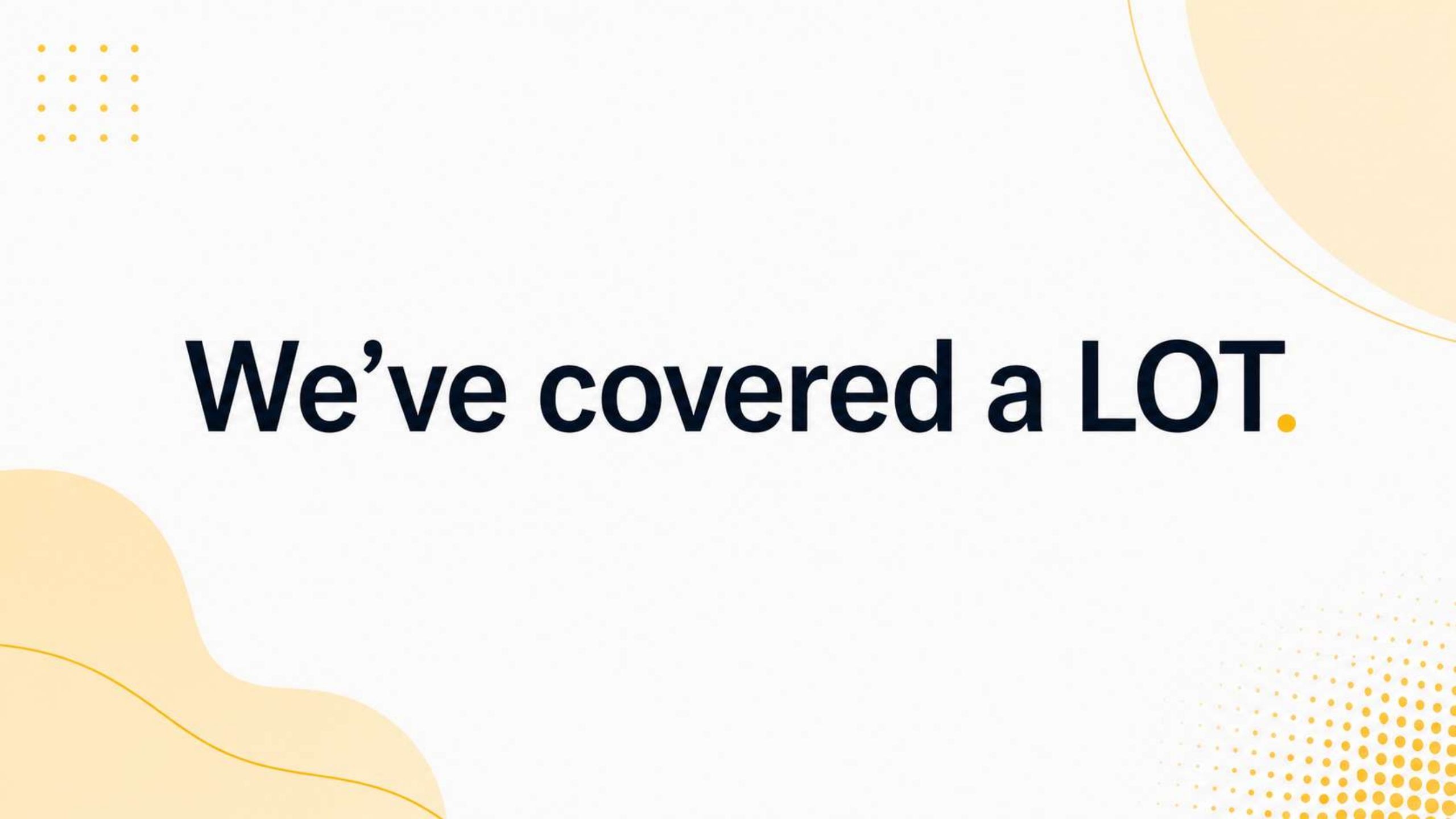
Knowledge



Strategy



Growth



We've covered a LOT.

In Part 1, we discussed:



The fact that agents are overwhelmed. They don't lack motivation, they lack capacity.



The fact that insurance is a leverage business, but that's not how most brokers operate. We're reinventing the wheel, again and again.



The idea that time is money, our calendar is our budget, and to-do items are IOUs. We need to clear our backlog and figure out how we're spending our time.



Because we do fewer things each day than we probably realized, improving just a few of these activity slots can increase our efficiency significantly.



We also talked about:



How knowledge must be retrievable and instantly accessible to be useful.



Why knowledge stored in our files and folders and emails and on sticky notes and in other people's heads is not useful.



How knowledge must be captured right away or it will be lost, and it should be stored in atomic chunks – small units of meaning that can stand alone and be recombined.



Why an outliner tool like **WorkFlowy** is a great way to store knowledge.



**And we suggested
that agencies really
need three types of
knowledge bases:**



Industry Knowledge Base



Agency Knowledge Base



Client Knowledge Base

The Three Layers



1 Industry knowledge

- which tells you what is true



2 Agency knowledge

- which defines how you operate



3 Client knowledge

- which tells you how to apply everything in a specific situation

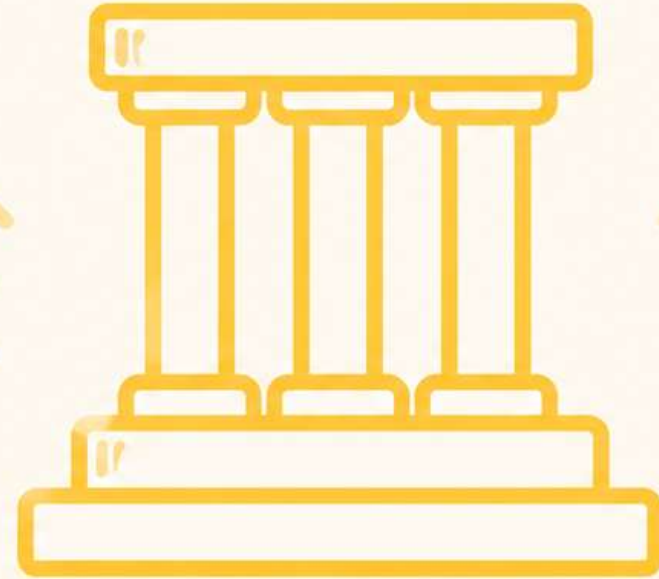
From Information to Leverage

- When these three come together, you move from just having information to **actually having leverage**.



This Is the Foundation

- This is the foundation for everything else we're going to do.





But Knowledge Alone Is Not Enough

What Comes Next



In Part 2, we focus on **execution**.



And how to turn all of this into real, **practical leverage**.

