BLACKBIRD FOR TRAINING

Generative AI in Insurance



Generative AI in Insurance

Introduction

Generative AI is becoming an important tool for improving insurance operations, helping teams complete tasks faster, simplify report writing, summarize documents, improve customer communication, and support operational teams across claims, underwriting, customer service, sales, and internal administration.

This course focuses on the practical use of ChatGPT and Generative AI in insurance environments. It covers report and email generation, document summarization, customer service automation, workflow automation, productivity improvement, and AI applications across insurance departments. The course also explains how Generative AI can be used in a structured and responsible way while maintaining accuracy, confidentiality, and human review. The content is aligned with the provided topic: Generative AI in Insurance.

The course follows a clear one-week sequence. It begins with the fundamentals of Generative AI in insurance, then moves into reporting and email writing, document summarization, customer service automation, workflow improvement, and practical AI use cases across insurance departments.

Course Objectives

By the end of this course, participants will be able to:

- Understand the role of Generative AI in improving insurance operations.
- Use ChatGPT to prepare operational and management reports.
- Write professional emails related to claims, policies, customer service, and internal communication.
- Summarize long insurance documents in a clear and structured way.
- Extract key points from policies, contracts, claims files, and correspondence.
- Prepare initial customer service responses with accuracy and clarity.
- Support claims teams with case summaries, follow-ups, and communication drafts.
- Support underwriting teams in organizing information and drafting notes.
- Improve productivity by automating repetitive writing and summarization tasks.
- Build effective prompts for insurance-related tasks.
- Understand the limitations of using AI with sensitive insurance data.
- Apply practical Generative AI use cases across insurance departments.



Course Outlines

Day 1: Introduction to Generative AI in Insurance

- The concept of Generative AI and its role in improving insurance operations.
- Introduction to ChatGPT and its practical workplace uses.
- Key areas where AI can support insurance companies.
- The difference between AI-assisted work and fully automated workflows.
- Principles of writing effective prompts for accurate and structured outputs.
- Responsible use of AI with sensitive data and insurance documents.

Day 2: Report and Email Generation

- Using ChatGPT to prepare claims, performance, and customer service reports.
- Turning raw notes or basic data into clear executive summaries.
- Writing professional emails for customers, suppliers, and internal teams.
- Preparing structured replies to repeated questions related to policies and claims.
- Improving communication style in terms of clarity, tone, and conciseness.
- Practical exercise on preparing a short report and an email for an insurance case.

Day 3: Document Summarization and Insurance Content Analysis

- Summarizing long insurance documents and extracting key clauses.
- Analyzing policy terms, exclusions, obligations, and coverage notes in a simplified way.
- Preparing claims summaries that include status, documents, actions, and open points.
- Converting meeting notes and correspondence into follow-up task lists.
- Reviewing AI-generated outputs and verifying accuracy before workplace use.
- Practical exercise on summarizing an insurance document and turning it into action points.

Day 4: Customer Service Automation and Workflow Improvement

- Using AI to prepare initial responses to customer inquiries.
- Building response templates for policies, claims, renewals, complaints, and service requests.
- Improving customer experience through faster response and clearer communication.
- Automating repetitive tasks such as request summaries, message classification, and follow-up preparation.
- Designing a simple workflow that combines employee input, AI assistance, and human review.
- Practical exercise on preparing an AI-supported customer service scenario.



Day 5: AI Applications Across Insurance Departments

- Generative AI applications in claims, underwriting, operations, marketing, and customer service.
- Building a practical prompt library for daily insurance tasks.
- Improving productivity by reducing time spent on writing, summarizing, and follow-up tasks.
- Identifying AI-related risks and setting review controls.
- Measuring the impact of AI use on speed, quality, and productivity.
- Integrated application covering a report, email, document summary, customer response, and follow-up plan for an insurance case.

Why Attend this Course: Wins & Losses!

- Gain practical understanding of Generative AI use in the insurance sector.
- Improve the speed and clarity of insurance report writing.
- Develop professional email writing skills for insurance contexts.
- Simplify the summarization of long documents, claims files, and correspondence.
- Support customer service with faster and more structured responses.
- Improve team productivity by reducing repetitive writing tasks.
- Build effective prompts that produce more accurate ChatGPT outputs.
- Support multiple insurance departments with practical AI applications.
- Improve internal and external communication quality.
- Strengthen case follow-up through clearer summaries and action plans.
- Reduce time spent drafting documents and initial responses.
- Promote responsible AI use while considering confidentiality and accuracy.

Conclusion

The Generative AI in Insurance: Practical Applications Using ChatGPT course provides a practical framework for using AI tools to improve daily work inside insurance companies. It covers key applications related to report writing, email generation, document summarization, customer service support, workflow automation, and productivity improvement.

The program follows a clear sequence. It starts with the role of Generative AI in insurance, then moves into practical use for writing and reporting. It then focuses on document summarization and insurance content analysis, followed by customer service automation and workflow improvement. The final day brings the course together through practical applications across claims, underwriting, operations, marketing, and customer service.

By the end of the course, participants will understand how to use ChatGPT and Generative AI in a structured and responsible way within insurance operations. The course helps improve productivity, communication quality, document handling, customer service response, and decision support through clearer and more usable AI-generated outputs.

