GENERATIVE AI IN INSURANCE



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TRAINING CENTER

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Introduction

Generative AI in Insurance Training Course shows insurance professionals how to apply large language models and generative tools across underwriting, claims, servicing and distribution. Participants learn to draft policy summaries, extract data from claim documents, build customer response templates and automate routine reporting with prompt engineering. The programme covers model selection, retrieval-augmented workflows, validation of AI output and the regulatory expectations that govern advice, fairness and data use. Furthermore, it addresses the risks that matter most in insurance: hallucinated figures, biased decisions, confidential claims data and explainability. As a result, delegates use AI to cut handling times without weakening control. Gentex Training Center delivers the programme through live tool workshops on real insurance cases.

Generative AI in Insurance Course Objectives

- Explain how large language models work and where they add value in insurance operations.
- Write effective prompts for underwriting notes, claim summaries and customer correspondence.
- Apply prompt engineering techniques including role framing, chain-of-thought and structured output.
- Extract and structure data from claim forms, medical reports and policy documents.
- Build retrieval-augmented workflows that ground AI answers in policy wordings and manuals.
- Automate first-response drafting, triage support and reporting summaries.
- Generate and critique product explainers, circulars and training material.
- Validate AI output against source documents to prevent hallucinated figures.
- Apply data protection, confidentiality and fairness requirements to AI use.
- Design a governed AI adoption plan for an underwriting, claims or servicing team.

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Course Methodology

The course combines short demonstrations with extensive hands-on tool workshops on real insurance cases. Participants write prompts, build retrieval workflows and test AI output against policy documents and claim files. In addition, structured peer critique and group discussion reinforce good practice, and every day closes with an applied insurance AI task.

Who Should Take This Course

- Underwriters, claims handlers and policy servicing staff.
- Insurance operations, transformation and digital managers.
- Product, pricing and actuarial support professionals.
- Brokers, agents and bancassurance distribution teams.
- Compliance, data governance and risk staff in insurers.
- Customer service and contact centre team leaders.

Generative AI in Insurance Course Outlines

Day 1: Generative AI Foundations for Insurance Professionals

- How large language models generate text and where they fail.
- Model families, context windows and multimodal capabilities.
- Use cases across underwriting, claims, servicing and distribution.
- Prompt fundamentals: clarity, context, constraints and output format.
- Setting tone and structure for regulated customer communications.
- Limitations: hallucination, bias, stale data and confidentiality risk.

- Workshop: writing a first prompt set for an insurance task.

Day 2: Prompt Engineering for Underwriting and Claims

- Role framing and task decomposition for risk and claim questions.
- Chain-of-thought reasoning for structured underwriting notes.
- Structured output formats including tables, checklists and JSON.
- Building reusable prompt templates for recurring document types.
- Drafting and critiquing claim summaries and settlement letters.
- Generating triage guidance and referral recommendations for review.
- Workshop: drafting an underwriting note and a claim summary.

Day 3: Document Extraction and Retrieval Workflows

- Extracting key data from claim forms, invoices and medical reports.
- Reading policy wordings, endorsements and exclusions accurately.
- Retrieval-augmented generation using policy manuals and knowledge bases.
- Building question-answer workflows over product and procedure documents.
- Comparing cover terms across multiple policies.
- Verification against source documents before use.
- Workshop: building a retrieval workflow over a policy manual.

Day 4: Customer Communication, Reporting and Automation

- Automating first-response drafting and routine correspondence.
- Generating explainers, circulars and internal training material.
- Connecting AI tools to spreadsheets, CRM and reporting templates.

- Producing management information summaries and complaints analysis.
- Quality control: checking figures, sources and regulatory wording.
- Human-in-the-loop design for regulated decision points.
- Workshop: producing an automated reporting and communication pack.

Day 5: Governance, Risk and AI Adoption Planning

- Confidentiality, data protection and permitted-use policies.
- Managing sensitive claims and personal data in AI tools.
- Fairness, bias testing and explainability expectations.
- Governance, review and approval requirements for AI output.
- Vendor and platform selection, including enterprise and local options.
- Building an AI adoption roadmap for an insurance team.
- Workshop: presenting an AI adoption plan before a review panel.

Conclusion

By successfully completing Generative AI in Insurance Training Course, participants will have acquired the knowledge to apply generative AI safely and productively across insurance operations. They will understand prompt engineering, document extraction, retrieval workflows, communication automation and governance controls, and they will know how to verify AI output before it influences a customer or a claim. As a result, delegates handle work faster without weakening control. Gentex Training Center builds the programme around current tooling and practice.

FAQs for the Generative AI in Insurance course

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Q1 What is the "Generative AI in Insurance" course about?

It teaches insurance professionals to use generative AI tools in daily work. You learn prompt engineering, document extraction, retrieval workflows, communication automation and governance controls, then apply them to underwriting, claims, servicing and distribution tasks.

Q2 What are the key benefits of the "Generative AI in Insurance" course?

You cut time spent on drafting, summarising and reporting while keeping human control over decisions. You also improve document review consistency, respond faster to customer and broker queries, and introduce AI use with proper confidentiality, fairness and governance safeguards.

Q3 What skills will I gain from the "Generative AI in Insurance" course?

You will gain generative AI prompt engineering, AI-assisted insurance document extraction, retrieval-augmented servicing and reporting workflows, and AI governance, validation and adoption planning.

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Q4 What tools, methods, or standards are covered in the "Generative AI in Insurance" course?

The course covers large language models and multimodal assistants, prompt engineering techniques including role framing, chain-of-thought and structured output, retrieval-augmented generation over policy manuals, AI integration with spreadsheets, CRM and reporting templates, human-in-the-loop review design, and confidentiality, data protection and fairness controls.

Q5 How is the "Generative AI in Insurance" course applied in real-world practice?

Graduates apply it to draft underwriting notes and claim summaries, extract data from claim and medical documents, compare cover terms across policies, generate customer explainers and circulars, prepare management information and complaints analysis, and run an AI-assisted workflow with documented review checks.