30 DAY AI ADOPTION PLAN

FIELD GUIDE AND LEADERSHIP PLAYBOOK

Move one live insurance workflow from experimentation to measurable, governed execution in 30 days.

Built for independent insurance agencies

Companion guide to the Insurance AI Advantage tracking workbook

Start with one workflow

The workbook is the working system. This guide explains the decisions behind it and the weekly rhythm needed to finish the 30 days.

Outcome	Day 30 evidence
Adoption	Team members use an approved Prompt or Skill on live work.
Workflow impact	Before and after measures show time, quality, cycle time, or rework changes.
Governance	The agency records data rules, human-review points, corrections, and exceptions.
Repeatability	At least one Prompt has a defined path toward a reusable Skill.
Leadership decision	Leaders select what to scale, refine, or stop and assign an owner.

The operating principle

Select one high-frequency workflow with visible friction. Use it on real work. Measure the difference. Review every output. Improve the method before expanding.

Workbook order

- **Start Here** sets the sponsor, champion, team size, labor value, start date, and first workflow.
- **30 Day Plan** assigns one clear action per day.
- **Activity Log** records each live use and the human review.
- **Workflow Tests** compares baseline and after results.
- **Weekly Review** converts activity into decisions.
- **Dashboard** and **Day 30 Review** give leadership a concise readout.

Week 1 Build confidence

Use a Prompt on low-risk, high-frequency work. Establish the baseline before claiming improvement.

Day	Action
Day 1	Confirm sponsor, champion, participants, and approved tool.
Day 2	Select one workflow with enough volume to test more than once.
Day 3	Record current minutes, revisions, cycle time, and quality.
Day 4	Apply one Prompt to a live task. Complete human review.
Day 5	Record corrections and revise the instruction.
Day 6	Repeat the revised Prompt on another live task.
Day 7	Hold the first 15-minute review and select one useful result.

Good workflow candidates

- Client follow-up
- Prospect research
- Pre-meeting preparation
- Document summary
- Internal meeting recap

Weekly proof

At least two live uses, a baseline, one recorded correction, and one result worth sharing.

Week 2 Standardize the work

Move from a useful Prompt toward a repeatable Skill with defined inputs, steps, rules, checks, and review boundaries.

Day	Action
Day 8	Map the workflow from intake through final output.
Day 9	Define approved data, prohibited data, and escalation points.
Day 10	Write a reusable Skill outline.
Day 11	Test the Skill on live work.
Day 12	Compare time, revisions, and cycle time with baseline.
Day 13	Give the Skill to one teammate and collect feedback.
Day 14	Approve changes during the weekly review.

Good workflow candidates

- Submission narrative
- Exposure summary
- Carrier strategy
- Renewal comparison
- Claims intake

Weekly proof

A documented Skill outline, a teammate test, and a before and after comparison.

Week 3 Improve advisory work

Apply AI support where analysis must lead to a clear human recommendation. Verify every fact against source documents.

Day	Action
Day 15	Select a second workflow tied to analysis or advice.
Day 16	Record its baseline measures.
Day 17	Apply the Prompt or Skill to live work.
Day 18	Verify facts and record material corrections.
Day 19	Use the reviewed output in the client or carrier process.
Day 20	Record an outcome tied to service, capacity, revenue, or retention.
Day 21	Select the workflow worth scaling next.

Good workflow candidates

- Coverage gap review
- Renewal analysis
- Policy simplification
- Executive proposal
- Placement strategy

Weekly proof

A verified advisory output and one recorded client, carrier, capacity, revenue, or retention signal.

Week 4 Govern and scale

Turn proven work into an agency standard. Assign ownership and make the review process explicit.

Day	Action
Day 22	Finalize the Skill and its owner.
Day 23	Store the approved version in the agency knowledge base.
Day 24	Train affected team members and confirm review boundaries.
Day 25	Use the Skill across the selected team.
Day 26	Review exceptions and inconsistent outputs.
Day 27	Finalize before and after workflow results.
Day 28	Approve what moves into the next cycle.
Day 29	Prepare the leadership readout.
Day 30	Select the next workflow and schedule the pilot review.

Good workflow candidates

- Skill owner named
- Version location recorded
- Human review required
- Exception path defined
- Measures remain active

Weekly proof

An approved Skill, assigned owner, trained users, completed workflow evidence, and a leadership decision.

Measure business impact

Track the change in work, not the number of AI interactions. Use the Activity Log for each live use and Workflow Tests for the before and after comparison.

Measure	Definition	Workbook calculation
Minutes saved	Baseline minutes less AI-assisted minutes.	Calculated for each Activity Log row.
Time reduction	Minutes saved divided by baseline minutes.	Calculated when both time inputs exist.
Estimated labor value	Hours saved multiplied by loaded hourly cost.	Calculated weekly and in total.
Adoption rate	Active team members divided by invited team members.	Calculated from weekly inputs.
Quality score	Reviewer rating from 1 to 5 after human review.	Averaged across recorded live uses.
Workflow decision	Leadership choice based on evidence.	Scale, refine, test, or stop.

Suggested target ranges

Treat targets as goals, not guarantees. A useful 30-day test should show enough live volume to judge the workflow, consistent human review, documented corrections, and a measurable improvement in at least one operating measure.

- Ten or more live uses across the participating team.
- Two or more workflows with complete baseline and after data.
- Average reviewed quality of 4.0 or higher on a 5-point scale.
- At least one workflow leadership approves for scaling.
- Four completed weekly reviews with owners and next actions.

Protect the agency and the client

AI-supported work still carries the agency's professional, contractual, privacy, and regulatory responsibilities. Use agency policy and approved vendor terms as the controlling standard.

Control	Required practice
Approved tools	Use only tools approved for the data and workflow involved.
Data handling	Remove or mask nonpublic personal information unless policy and vendor terms permit the exact use.
Human review	A licensed or authorized person reviews accuracy, coverage, compliance, and tone before use.
Source verification	Check policies, endorsements, carrier guidance, client records, and current requirements.
Correction log	Record material corrections and update the Prompt or Skill when appropriate.
Escalation	Stop and escalate unclear coverage, legal, regulatory, security, pricing, or binding decisions.
Version control	Store the approved Skill, owner, effective date, and revision history in one location.

Human review is part of the workflow

Do not measure success by speed alone. A faster output with missed coverage, unsupported facts, poor data handling, or unclear ownership fails the test. The Activity Log includes reviewer, correction, and risk fields for this reason.

Run the weekly review in 15 minutes

Use the same agenda each week. Keep the discussion tied to evidence and a decision.

Time	Discussion
2 min	Review participation, adoption, minutes saved, and quality.
5 min	Each participant shares one useful result or one correction.
3 min	Select the strongest client, carrier, capacity, or revenue outcome.
3 min	Approve one change to the Prompt, Skill, guardrail, or workflow.
2 min	Confirm the next action, owner, and due date.

Questions for the AI champion

- Did the team use the workflow on live work?
- Did every output receive the required human review?
- What changed in time, quality, rework, cycle time, or outcome?
- What correction should change the Prompt or Skill?
- Who owns the next action and when is it due?

Avoid these failure points

- Testing too many workflows at once.
- Skipping the baseline.
- Counting logins or prompts instead of operating results.
- Treating a first draft as a final answer.
- Using unapproved tools or restricted data.
- Expanding before ownership and review controls are clear.

Make the Day 30 decision

Leadership should finish the month with a clear choice, accountable owners, and a next date. The completed workbook provides the evidence.

Decision	Use when
Continue and scale	The workflow shows repeatable value, acceptable quality, clear ownership, and manageable risk.
Refine and retest	The value is visible, but instructions, inputs, controls, or review steps need work.
Pause	The workflow lacks sufficient value, volume, data quality, ownership, or an acceptable control path.

Pilot review preparation

- Bring the completed Dashboard and Workflow Tests.
- Select one workflow with measurable value and repeatable volume.
- Identify systems, documents, decisions, exceptions, and review owners.
- Prepare baseline volume, time, labor cost, and target service level.
- Schedule the Apeironix pilot review at apeironix.com/contact-us.

Source and companion resources

This field guide aligns with *The Insurance AI Advantage System, 2026 Edition* and the current Insurance AI Advantage System resource page. Explore the Skills Library and related resources at apeironix.com/insurance-ai-advantage-system.

Apeironix

Insurance-specific Prompts, Skills, and AI Teammate frameworks for modern agencies.