



QUICK-START ROLE MAP

From The Insurance AI Advantage System Keynote Series – 2026 Edition

Your Role	Start Here (Week 1)	Expected First Win	Time Saved (Typical)
Producer	Prospect Intelligence Brief + Follow-Up Email Builder	Stronger meetings & faster follow-up	30–45 min per prospect
Account Manager	Policy Simplifier + Renewal Comparison Assistant	Clearer client explanations	20–40 min per renewal
Marketing / Submission Desk	Submission Narrative Engine + Carrier Strategy Builder	Faster, higher-quality submissions	45–60 min per account
Service / Operations	FNOL Structurer + Document Summarizer	Cleaner claims intake & documentation	25–35 min per file
Leadership	30-Day Adoption Plan + Metrics Dashboard	Visible ROI in 30 days	Agency-wide capacity gain