



CLARO
INSURANCE

ARTIFICIAL INTELLIGENCE

MANUAL FOR HEALTH AND

LIFE INSURANCE AGENTS.



At Claro Insurance, we recognize that the landscape of health insurance is constantly evolving, largely driven by rapid technological innovations. That's why we understand the importance for our agents and insurance agencies not to lag behind, but to lead the forefront of these changes.

By staying informed about technological innovations, our agents will not only improve their efficiency, but also be able to identify and leverage new opportunities. Optimize their internal processes, and provide solutions that align with the needs and expectations of their clients to grow!

What is Artificial Intelligence?

Artificial intelligence is redefining the way business is conducted in many sectors, including the insurance industry. For agents and agencies, learning and adapting to this technology is not just a competitive advantage, but a necessity to provide quality services and stay relevant in the modern market.

Health and life insurance agents should learn about artificial intelligence for several reasons:

- ✔ **Operational Efficiency:** AI tools can automate many repetitive and time-consuming tasks, such as form processing or policy review. By reducing the time spent on these tasks, agents can focus on more valuable activities, such as interacting with clients.
- ✔ **Improved Customer Service:** AI-powered chatbots and automatic response systems can help quickly answer common customer questions, providing faster and more efficient service.
- ✔ **Insights:** With AI, insurance agents can obtain real-time insights into market trends, customer behaviors, and other crucial factors that can influence business decisions.

- ✔ **Competitiveness in the Market:** As more and more insurance companies adopt AI technologies, agents who are familiar with these tools will be in a better position to compete and offer innovative services.
- ✔ **Industry Evolution:** The insurance industry, like many others, is rapidly evolving with the incorporation of new technologies. To stay relevant and at the forefront, it is essential for agents to familiarize themselves with and adapt to these tools.

At Claro Insurance, we want our agents to be at the forefront of the digital age and use technology to their advantage, so they can become more competitive, agile, and grow their businesses.

Branches of Artificial Intelligence

01

Neural Networks: Neural networks are calculation systems that resemble the functioning of the human brain. They learn from data and can perform complex tasks, such as image identification or language translation.

02

Knowledge-Based Reasoning: This branch focuses on simulating human reasoning using knowledge databases. A common example is an expert system that provides recommendations based on a set of predefined rules.

03

Computer Vision: Computer vision enables machines to "see" and interpret images and videos. It is used in a variety of fields, from object identification to autonomous vehicle driving.

04

Natural Language Processing: This branch deals with the interaction between computers and human language. It allows machines to understand, interpret, and generate text coherently.

05

Machine Learning: This branch focuses on the development of algorithms and statistical models that enable machines to learn by themselves through experience.

06

Robotics and Automation: This branch is dedicated to the design and construction of machines capable of performing tasks autonomously or semi-autonomously.

Module: Chat GPT

Chat GPT is a language model based on artificial intelligence developed by OpenAI. It has been trained on a vast amount of data to generate responses to questions and perform tasks in multiple languages. It is designed to learn from its interactions and continually improve its ability to understand and produce natural language.

Key points when using Chat GPT:

- ✓ It is a **tool** that complements us and enhances efficiency, which is controlled by the user and not the other way around.
- ✓ Prompts should be **specific and unambiguous**.
- ✓ Never settle for the first response - **Correct and guide it**.



Prompt Development

Prompts refer to an instruction, signal, or set of information given to Chat GPT to produce a response or action. Below, we will provide you with a basic guide that can help you start using this tool.

How to Construct a Prompt?

The **ESCE** methodology is a framework that can be applied to designing "prompts" or instructions to obtain clearer and more effective responses through Chat GPT. "ESCE" is an acronym representing the following stages:

E **EXPERT:** Simulate that you are an expert in a profession or specialty related to the topic.

S **SITUATION:** Provide context within the company or situation related to the topic.

C **CONSULT:** Formulate the PROMPT or question that Chat GPT should answer, including key and specialized terminology.

E **STYLE:** Mention the desired response format (List, paragraph, etc.).

The ESCE methodology is used to improve the quality and accuracy of responses obtained from language models. By designing prompts using these guidelines, you are more likely to receive responses that are helpful and aligned with your expectations.

Ideas for Creating Your Prompts:

Generated Prompts from Prompts:

If we need the same Chat GPT to help us generate a Prompt, enter the following text into the platform and provide all the information the platform requires.

“You are a prompt-generating robot. You need to gather information about the user's goals, objectives, examples of optimal outcomes, and other relevant contexts. The prompt should include all the necessary information that was indicated to you. Ask the user questions until you are confident that you can produce a perfect prompt. Your response should be in a clear and optimized format for instructing ChatGPT. Start by asking about the goals and expected results, as well as any necessary information you may need.”

Learning Prompts

This is a prompt that will help you learn about a specific topic. However, always remember to verify the sources and the information provided by the system.

✔ **Base Prompt:** Imagine you are interviewing an expert in (FILL IN) to obtain detailed and valuable information on how to effectively tackle (FILL IN). Formulate 5 deep and specific questions that allow you to acquire practical and applicable knowledge on the subject. Then, write a summary of their responses and how these can help you address (FILL IN) successfully.

Example: Imagine you are interviewing an expert in {health insurance} to obtain detailed and valuable information on how to effectively tackle {the market in the United States}. Formulate 5 deep and specific questions that allow you to acquire practical and applicable knowledge on the subject. Then, write a summary of their responses and how these can help you address {the sales plan for my insurance business} successfully.

Deep Learning Prompts:

If we want to delve deeper into a specific topic, here's another prompt we can use:

✔ **Prompt Base:** "I want you to simulate being an expert in (FILL IN). I want you to create a course where you explain the most important points to consider and use practical examples that allow the student to learn in a more didactic way. Mention all the chapters and subchapters that can ensure the correct transmission of information through the course.

Example: "I want you to simulate being an expert in {digital marketing}. I want you to create a course where you explain the most important points to consider and use practical examples that allow the student to learn in a more didactic way. Mention all the chapters and subchapters that can ensure the correct transmission of information through the course.



At this point, it will provide you with the entire curriculum you need for learning, and you only need to develop it, so you continue with the following instruction:

- ✔ **Prompt 2:** "Now, following the same premise, I want you to develop Chapter {1}: (copy and paste that chapter)"

Finally, you continue asking for the development of the following:

- ✔ **Prompt 3:** "Let's continue with the next chapter: (copy and paste)"

Prompts for Strategic Plan Development:

Achieving your results may involve setting goals using SMART objectives, and for this, we will use the following prompt:

- ✔ **Prompt Base:** "One of my objectives is (FILL IN) where (FILL IN) in the next (XX) weeks, turn this objective into SMART."

Create a detailed day-by-day plan that shows me the step-by-step process to achieve this SMART objective.

Example: "One of my objectives is {increasing brand visibility} through {social media} in the next {2} weeks, turn this objective into SMART.

Create a detailed day-by-day plan that shows me the step-by-step process to achieve this SMART objective."

Prompts for Writing Content for Social Media Posts:

If we want to create content for your digital channels or social media, we'll use the following Prompt:

- ✔ **Prompt Base:** "I want you to simulate being my advertising creative. I want you to give me {NUMBER} ideas for {SOCIAL MEDIA}. The response should include the creative idea, internal piece text, and complementary external text. Additionally, use the name of my company {FILL IN} and focus on {FILL IN}."

- ✔ **Example:** "I want you to simulate being my advertising creative. I want you to give me {5} ideas for {Instagram}. The response should include the creative idea, internal piece text, and complementary external text. Additionally, use the name of my company {Claro Insurance} and focus on {the health and life insurance sector}."



Other quick prompts that can help you generate content:

- ✔ I need some blog post ideas on how to (fill in).
- ✔ What's the best approach to create content in the (audience) niche?
- ✔ Give me several headline examples for my blog that will capture the reader's attention.
- ✔ Tell a personal story about (fill in).
- ✔ Write 5 social media posts for (social media platform) about (fill in).
- ✔ Organize a social media content publishing calendar for the next month on the topic of (fill in).
- ✔ Generate a script for a 3-minute video for a Facebook advertising campaign promoting our new service (fill in).
- ✔ I need (number) tips to increase engagement on (social media platform).
- ✔ I want (number) ideas to gain followers on (social media platform).
- ✔ I need a (post) with (five) hooks to keep my audience engaged during a reel.
- ✔ I want a (title) for my reel about (tips for growing on Instagram).
- ✔ Create a (post) with (five) steps for (your topic).
- ✔ Create a (description) for a video about (fill in).



Would you like more ideas on artificial intelligence and marketing to transform y our business?

Request a meeting [{here}](#) with our team and start your digital transformation with **Claro Insurance** and our Lead Magnet program. Our marketing team is ready to accompany and guide you through digital strategies to boost and grow your business.

