AME TRAINING ACADEMY
Transform your future
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Certified Artificial Intelligence (AI) for Insurance Advisor & Leader

Module 1: AI Foundations & The Insurance Evolution

Main Topics & Sub-Topics:

Introduction to AI for Insurance: Definition of AI, Machine Learning (ML), and Natural Language Processing (NLP) specifically within the context of risk and actuarial models.

History & Milestones: From the Turing Test and Deep Blue to modern AI-driven underwriting and AlphaGo's logic applied to complex decision-making.

The 5 Domains of AI in Insurance:

1. Machine Learning: Predictive models for risk estimation and pricing.
2. Robotics/RPA: Automating policy administration and routine data entry.
3. NLP: AI-powered chatbots and virtual assistants for policyholder engagement.
4. Expert Systems: Rule-based decision-making for automated policy approvals.
5. Computer Vision: Image recognition for automated damage assessment in claims.

Learning Outcomes:

- Explain the historical milestones and core domains of AI as they relate to the insurance sector.
- Identify opportunities to replace manual, paper-heavy tasks with automated workflows.
- Understand the importance of big data and GPUs in driving modern insurance analytics.

Module 2: AI-Driven Advisory & Customer Experience

Main Topics & Sub-Topics:

1. Personalized Recommendations: Using ML to analyze life events and customer data for "next best offer" suggestions.
2. Omnichannel Engagement: Managing customer interactions across chat, email, and voice using AI agents.
3. Customer Retention & Sentiment: Predictive analytics to identify at-risk policyholders and real-time sentiment analysis to guide agent responses.
4. Intelligent Lead Qualification: Using AI to filter and prioritize leads based on intent signals and risk factors.

Learning Outcomes:

- Design a customer engagement strategy that balances AI speed with human empathy and emotional intelligence.

- Apply AI tools to create personalized insurance plans that align with a client's specific financial goals.
- Leverage 24/7 AI assistants to improve customer satisfaction and reduce call volumes for routine queries.

Module 3: Strategic Leadership, Risk, & Underwriting

Main Topics & Sub-Topics:

1. Advanced Underwriting & Risk Assessment: Shifting from historical data to real-time feeds (e.g., telematics, wearables, and lifestyle data) for more accurate pricing.
2. Claims Transformation: Automating First Notice of Loss (FNOL), adjudication, and settlement processes using predictive modeling.
3. Fraud Detection & Prevention: Utilizing AI to detect anomalies and suspicious patterns in claims to reduce financial losses.
4. AI Roadmap & Governance: Building a strategic roadmap for AI adoption and managing organizational change/workforce upskilling.

Learning Outcomes:

- Evaluate AI-generated insights to make tech-savvy decisions regarding product innovation and market reach.
- Understand the impact of AI on core insurance functions like pricing, risk pooling, and actuarial modeling.
- Develop a plan to manage the "skills gap" and resistance to change within an insurance agency or organization.

Module 4: Ethical AI Governance & Regulatory Compliance

Main Topics & Sub-Topics:

1. Bias & Fairness: Identifying and mitigating algorithmic bias in pricing and claims assessments to ensure "fair discrimination".
2. Transparency & Explainability: Moving beyond "black box" AI to explainable design principles for regulators and customers.
3. Regulatory Landscapes: Navigating evolving frameworks such as the EU AI Act, GDPR, and sector-specific insurance regulations.
4. Data Privacy & Security: Ensuring stringent data governance for sensitive personal information and preventing data breaches.

Learning Outcomes:

Implement ethical AI frameworks that prioritize transparency, accountability, and inclusivity.

Conduct regular audits and bias checks to ensure compliance with state and int…

schedule

Day 1: AI Foundations & The Insurance Evolution

09:00 – 10:30: The History of AI: From Alan Turing to AlphaGo. Why AI is booming now (Big Data & GPUs).

11:00 – 12:30: The 5 Domains (MR. NEC): Machine Learning, Robotics, NLP, Expert Systems, and Computer Vision in an insurance context.

14:00 – 15:30: AI vs. Human Intelligence: Where AI excels (data processing) and where it fails (empathy and general intelligence).

16:00 – 17:00: Case Study: How "Expert Systems" revolutionized automated policy approvals.

Day 2: The AI-Enhanced Customer Experience

09:00 – 10:30: NLP & Virtual Assistants: How chatbots handle routine inquiries and First Notice of Loss (FNOL).

11:00 – 12:30: Personalization Engines: Using ML to predict the "Next Best Offer" for life and health insurance.

14:00 – 15:30: Sentiment Analysis: Using AI to "read" customer emotions during claims calls to improve retention.

16:00 – 17:00: Workshop: Designing an AI-driven customer journey map for a digital-first agency.

Day 3: Strategic Leadership in Underwriting & Claims

09:00 – 10:30: Advanced Underwriting: Shifting from static actuarial tables to real-time telematics and lifestyle data.

11:00 – 12:30: Automated Claims Processing: Using Computer Vision for instant vehicle damage assessment via photos.

14:00 – 15:30: Fraud Detection: Identifying "Red Flags" using anomaly detection and predictive modeling.

16:00 – 17:00: Leadership Strategy: Building an AI roadmap and managing the "Human + AI" workforce transition.

Day 4: Governance, Ethics & Regulations

09:00 – 10:30: The Ethics of AI: Managing algorithmic bias in pricing and ensuring "Fair Discrimination".

11:00 – 12:30: Explainable AI (XAI): Why "Black Box" models aren't enough for insurance regulators.

14:00 – 15:30: Global Regulations: Deep dive into the EU AI Act, GDPR, and local insurance commission guidelines.

16:00 – 17:00: Risk Audit: How to conduct a bias check on an automated underwriting model.

Day 5: Technical Foundations & Certification Prep

09:00 – 10:30: Python for Advisors: Understanding Data Types (Lists, Dictionaries) and basic functions.

11:00 – 12:30: Data Preprocessing: Cleaning Statement of Values (SOV) and handling missing data for AI models.

14:00 – 15:30: Measuring Success: Formulas for RMSE, Precision, Recall, and F1-Score in model evaluation.

16:00 – 17:00: Exam Simulation: Mock IABAC Foundation questions and final review of milestones (Deep Blue, Watson, AlphaGo).

Learning Delivery Method

Mornings: Theoretical concepts and framework review.

Afternoons: Hands-on workshops or industry-specific case studies.

End of Day: Knowledge checks (MCQ format) to align with IABAC exam styles.