Effective Business Report Writing in an AI-Enabled Workplace

Duration: 1 day
Method: Face to Face
Maximum 10 delegates

About the Module
Strong business report writing remains one of the most important professional skills within the insurance sector. Whether producing underwriting commentary, claims reports, management summaries, board papers, compliance updates, client communications or regulatory documentation, insurance professionals must communicate clearly, concisely and credibly.

Poorly written reports can create confusion, weaken decision-making, increase operational risk and damage stakeholder confidence. At the same time, advances in Artificial Intelligence (AI) tools such as ChatGPT, Microsoft Copilot and Google Gemini are rapidly changing how professionals draft, edit, summarise and review written content.

This practical one-day course builds strong report-writing fundamentals while also exploring how AI can support business writing safely and effectively within insurance environments. Participants will learn how to improve clarity, structure and professionalism in their writing, whilst also understanding the opportunities, limitations and governance considerations associated with AI-assisted writing.

Who Should Attend
This course is suitable for professionals across the insurance and financial services sectors who are required to produce, review or contribute to written business communication and reporting.

This may include:
- Underwriters
- Claims professionals
- Operations teams
- Compliance and risk personnel
- Team leaders and managers
- Analysts and reporting staff
- Client service and relationship teams
- Professionals producing internal or external stakeholder reports

Course Objectives
- Understand the principles of effective business report writing and professional communication.
- Improve clarity, conciseness and structure in written reports and stakeholder communications.
- Learn how to present complex or technical information more clearly and effectively.
- Develop stronger commentary, summary, recommendation-writing and self-editing skills.
- Explore how AI tools can support drafting, summarising, proofreading and report development.
- Understand the limitations, risks and governance considerations associated with AI-generated content.

- Learn safe and responsible approaches for using AI within insurance and regulated environments, including GDPR and confidentiality considerations.
- Recognise where AI can add value whilst maintaining appropriate human judgement, oversight and professional standards.

Course Content

- Module 1 – Foundations of Effective Business Report Writing
    - The role and purpose of business reports within the insurance sector
    - Principles of clear, concise and credible professional communication
    - Understanding your audience, purpose and desired outcome

- Module 2 – Structure, Clarity and Style
    - Structuring reports for clarity, logical flow and impact
    - Writing with conciseness and removing unnecessary complexity
    - Tone, language and professional style within regulated environments

- Module 3 – Presenting Complex, Technical Information and Making Recommendations
    - Communicating technical information clearly
    - Using summaries, headings and visual structure effectively
    - Tailoring detail for different stakeholders and decision-makers
    - Writing strong commentary, management summaries
    - Developing clear, actionable recommendations

- Module 4 – Introduction to AI-Assisted Writing
    - An overview of AI tools such as ChatGPT, Microsoft Copilot and Google Gemini
    - How AI can support drafting, summarising, editing and proofreading
    - Practical applications of AI within insurance report writing

- Module 5 – Risks, Limitations and Governance of AI
    - Understanding the limitations and risks of AI-generated content
    - Accuracy, bias, confidentiality and "hallucination" considerations
    - Governance, GDPR and data protection in regulated environments

- Module 6 – Responsible and Effective Use of AI
    - Safe and responsible approaches to using AI within insurance environments
    - Maintaining human judgement, oversight and professional standards
    - Recognising where AI adds value and where it does not
    - Practical application and personal action planning