

Live Webinar - Practical AI Fundamentals

Essential Skills for Insurance and Financial Services Professionals

Duration: 3 hours

Method: Live Webinar

Maximum 10 delegates

About this course

AI tools such as ChatGPT, Microsoft Copilot and Google Gemini are rapidly changing day to day work across insurance and financial services. Used well, they help professionals draft, summarise, research and analyse faster and to a higher standard. Used poorly, they introduce real risk around accuracy, confidentiality and compliance.

This practical session builds the core, hands on skills professionals need to use everyday AI tools confidently, safely and effectively in a regulated environment. Participants move from uncertainty to capability, learning how the tools actually work, how to get reliable results through effective prompting, and how to apply AI to real tasks while maintaining human judgement and professional standards.

The emphasis is practical throughout, with guided exercises using common tools, so participants leave able to apply what they have learned immediately. No prior AI experience is required.

Who Should Attend

This course is suitable for professionals across insurance and financial services who want to use AI tools confidently and responsibly in their day to day work.

This may include:

- Underwriters and claims professionals
- Operations and administration teams
- Compliance, risk and governance personnel
- Analysts and reporting staff
- Client service and relationship teams
- Team leaders and managers
- HR and learning and development professionals

Course Objectives

By the end of this course, participants will be able to:

- Understand what generative AI is, how tools such as ChatGPT, Copilot and Gemini work, and what they can and cannot do
- Write clear, effective prompts that produce reliable, relevant and usable results
- Apply AI to everyday professional tasks such as drafting, summarising, rewriting, researching and analysing information
- Critically review AI output for accuracy, bias and “hallucination”, applying appropriate human judgement
- Use AI safely in a regulated environment, including confidentiality, data protection and GDPR considerations
- Recognise where AI adds value and where traditional approaches or human oversight remain essential
- Build personal confidence and good habits for ongoing, responsible AI use

Course Content

- Module 1: Understanding Everyday AI
 - What generative AI is and how large language models work, explained in plain language
 - An overview of the main tools (ChatGPT, Microsoft Copilot and Google Gemini) and where each fits
 - Strengths, limitations and common misconceptions
- Module 2: The Core Skill of Prompting
 - How to structure clear, effective prompts that produce reliable results
 - Giving context, role, format and examples to improve output
 - Iterating and refining, and troubleshooting weak responses
 - Guided hands on practice
- Module 3: Applying AI to Everyday Tasks
 - Drafting, rewriting and improving written communication
 - Summarising long documents, emails and meeting notes
 - Researching, comparing and structuring information
 - Practical exercises using participants' own typical tasks
- Module 4: Reviewing Output and Using AI Safely
 - Checking AI output for accuracy, bias and hallucination
 - Maintaining human judgement, oversight and professional standards
 - Confidentiality, data protection and GDPR in a regulated environment
 - Safe working habits and a personal action plan