



Singapore College
of Insurance



THE DIGITAL INSURER

TDI

GEN AI

for Insurance Agents

From AI-curious to
AI-productive in one day.



9 October 2026



8.30 a.m. – 6.00 p.m.



Singapore College of Insurance (SCI)

A practical, hands-on masterclass built around the real workflow of a financial representative – from prospecting and needs analysis to proposals, client servicing and responsible use.

Includes 2 purpose-built AI Assistants

[Register Now](#)

WHY GENAI . WHY NOW .

The 2026 agency reality: **personalised, competitive, always-on.**

Clients increasingly expect timely, personalised and easy-to-understand communication. Financial representatives must meet these expectations while maintaining professional judgement, protecting client information and complying with organisational requirements. This masterclass shows participants how GenAI can support that work responsibly.



71%

of consumers expect personalised interactions
- and are frustrated when they do not get them.

Source: Mckinsey & Company: The value of getting personalization right—
or wrong—is multiplying

AI is being applied across the insurance industry in areas such as lead generation, next-best-action recommendations and general sales support.

Your day, upgraded

What changes after this Masterclass?

Draft personalised outreach in under 10 minutes. Prepare more efficiently for client meetings using structured AI-assisted briefing prompts.

	Before Manual	After AI-assistance
Prospect 	Research prospects and draft outreach manually	Draft personalised outreach in under 10 minutes
Analyse 	Manual meeting prep from scattered notes	AI-assisted client briefing with suggested leading questions
Propose 	Hours spent simplifying and formatting product information	Draft structure for a needs-based discussion, subject to professional review that explains complex products in plain language
Close 	Rehearse objections alone, if at all	Practise real objections in an AI role-play before the meeting
Service 	Reactive, single-language follow-ups when time allows	Draft timely follow-ups and multilingual communication for review and identify appropriate opportunities for further needs-based conversations
Comply 	Interpreting AI-related guardrails across different tasks	Apply a structured responsible-AI checklist throughout the workflow

Responsible AI runs through every stage — it is not an add-on.

Every prompt is applied within FEAT principles and MindForge guard-rails covering intellectual property, source transparency, hallucination prevention and responsible use.

Note: All AI-generated outputs must be verified and adapted using professional judgement.

FEAT –

Fairness, Ethics,
Accountability, Transparency

MindForge –

IP, source transparency,
hallucination guard-rails

Fraud/AML –

Red-flag detection
prompt practice



Pre-Programme Readiness Check Session

Orientation, ChatGPT readiness check, tech setup and Singpass walk-through. Participants who need help receive a ChatGPT basics primer and curated links before the masterclass.

The One Day Experience

A day in the life of a high-performing financial representative

A guided, hands-on journey that moves from first prompt to real client scenarios - with practical tools participants can take back to their own book of business.

- **Welcome + Storyboard** | Map the agent's day
- **Tech + Distribution Trends** | Why and how GenAI redefines selling
- **GenAI Fundamentals** | COPILOT prompting framework
- **Prompting Basics** | Meet MasterPrompt + SuperAgent
- **Financial Crime + Fraud** | Red-flag detection prompts
- **Workshop 1** | Branding + prospecting
- **Workshop 2** | Needs analysis + proposals
- **Workshop 3** | Closing + objections
- **Workshop 4** | Service + cross-sell
- **Responsible AI** | FEAT + MindForge guard-rails
- **End of course assessment** | Feedback session



How You'll Learn

Not a lecture. A guided practice lab.

Every section uses the same loop: try a realistic scenario, debrief what happened, extract the principle and apply it to your own client segment.



Experience

Try a realistic scenario with AI prompts

COPILLOT prompting framework

A 7-element system for better prompts:

Context, Objective, Persona, Inputs, Length, Output, Tone.



Reflect

Facilitated debrief: what worked, what did not and why

2 purpose-built AI Assistants

Includes guided access to MasterPrompt and SuperAgent during the programme and six-month community period. Platform requirements and responsible-use conditions apply.

Mini workshops 1 - 4.



Conceptualise

Extract the principle behind the prompt

AI sales simulator

Practise objection handling, closing techniques and realistic role-plays before applying them in client conversations.



Apply

Use it on your client and your segment

Investment, Certification + Experienced Faculty

Built for ambitious financial representatives and agency teams

Practical. Relevant. Built for today's insurance professionals.

Programme Fee

S\$1,635.00 (inclusive of 9% GST)

Up to 40 participants per cohort. Includes pre-brief webinar, full-day masterclass, ChatGPT primer, readiness check, 6-month SCI + TDI community access and certificate.

IBF-STS Eligible

Net Course Fee: **S\$585.00** (incl. of 9% GST and after 70% STS funding)
For Singapore Citizens aged 40 years old and above

Net Course Fee: **S\$885.00** (incl. of 9% GST and after 50% STS funding)
For Singapore Citizens below 40 years old and Singapore Permanent Residents

Certificate of Completion

Earn it by completing:

1. Full one-day Masterclass attendance.
2. End-of-course MCQ score of at least 80% (8/10).

Programme Faculty: Learn from experienced industry practitioners



Mr. Abhishek Rathi

Generative AI Advisor, The Digital Insurer (TDI)

23 years in Sales, Strategy, Digital Transformation and Customer Engagement in Insurance. Builder of the two purpose-built AI Assistants used in the Masterclass.



Mr. Hugh Terry

Founder, The Digital Insurer (TDI)

Architect of the programme. 25+ years in insurance and insurtech across Asia. Convenor of the TDI community.

50⁺ YEARS of

Nurturing Talent and Building Capabilities

**Ready to turn GenAI into practical,
responsible productivity?**



Register Now

Register for the
9 October 2026 intake.
Limited to 40 participants.

Agency and company cohort
enquiries are welcome.

Singapore College of Insurance

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Singapore College of Insurance

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