ClaimsAgent Stakeholder Briefing – Internal FAQ & Adoption Insights

Audience

Claims leadership, trainers, IT support, product stakeholders

Purpose

To align internal teams on what ClaimsAgent is, how it supports adjusters, and how to respond to questions or concerns from staff. This briefing includes early discovery insights, core findings, and onboarding considerations relevant to deployment and support.

1. Discovery Summary: What We Learned From Adjusters

- Adjusters manage complex workflows across multiple tools and screens.
- Common pain points include redundant data entry, lack of editability, and poor visibility into status and documentation.
- There is hesitancy toward automation without transparency or control.
- Adjusters value tools that reduce friction but still allow for manual oversight.

What This Means for Rollout: Any new assistant must be trustworthy, clearly explainable, and seamlessly integrated into current workflows. Change must feel additive, not disruptive.

2. Key Findings From Usability Testing

- Users defaulted to free-text queries but appreciated task-based chips when unsure.
- Clarity around statuses, confirmation messages, and file uploads significantly boosted task confidence.
- Adjusters were more willing to engage with ClaimsAgent when it provided guidance without taking over.

Design Responses:
- Visual status timelines
- "Edit with audit history" feature
- Drag-and-drop document upload zone
- Confirmation steps before submission or changes

3. Anticipating Internal Questions & Answers

Q: How do we know this won't slow down adjusters?
A: ClaimsAgent was designed around their current workflows, not in place of them. Key actions are accessible via natural language or shortcuts, reducing time spent navigating menus or double-checking entries.

Q: What if an adjuster makes a mistake using it?
A: Every action in ClaimsAgent includes a confirmation and is tracked via audit trail. Mistakes can be edited or undone, and nothing is submitted without approval.

Q: How will we measure success?
A: Success metrics include reduction in time to complete core tasks, decrease in error-related rework, and user satisfaction/confidence ratings gathered through feedback sessions.

Q: Will ClaimsAgent replace adjuster judgment?
A: No. ClaimsAgent provides support and streamlines repetitive steps, but final review, decisions, and submissions remain fully in the adjuster's hands.

Q: What support is in place for rollout?
A: A First-Time User Guide is available, as well as in-app tips and optional onboarding walkthroughs. IT support and trainers will also be briefed using this document.

4. Next Steps & Recommendations

- Share this FAQ and onboarding overview with team leads before rollout.
- Host a live walkthrough to answer questions and preview ClaimsAgent.
- Encourage adjusters to start with low-risk queries to build confidence.
- Gather structured feedback during the first 30 days to shape future iterations.

Final Note

ClaimsAgent isn't just a tool—it's a shift toward intelligent, user-centered support. With proper framing and internal alignment, it can help adjusters do their best work with greater speed and clarity, while retaining full control over their cases.