

THE 12 LESSONS

From your very first chat to your own AI coworker, filling ACORDs, driving carrier portals, and running your agency's busywork on autopilot.

PART ONE · CHAT

Learn on any device. Nothing to install.

01

Meet Claude

Set up your workspace, learn the three-strikes rule for spotting work, and watch Claude read a real file.

F1-2-3

02

Your First Skill

Install a skill and fill a whole ACORD 125 from a submission with a single command.

03

Documents to Work

Summaries, side-by-side policy comparisons, and client emails, all from files you already have.

F4

04

Teach It Your Agency

Teach Claude your sign-off, your team, and your agency's writing voice, once, and it remembers.

F5

05

Connect Your Tools

Hook up your email, calendar, and files so Claude works straight from your real inbox.

F6

06

Research & Leads

Pre-call briefs, real lead lists with public contact info, and personalized outreach.

F7

PART TWO · COWORK

The desktop app + a paid plan. Now Claude has hands.

07

Meet Cowork

Install the desktop app and give Claude hands on the real files on your computer.

F8

08

Drive Your Browser

Claude drives Chrome and fills a carrier portal from an ACORD, two carriers at once.

F9

09

One Ask, a Whole Job

One submission becomes a risk summary, a filled ACORD, a cover note, and a filed client folder.

10

A Whole Folder at Once

Point Claude at a folder of dec pages and get back one clean renewal spreadsheet.

11

Build a One-Click Skill

Turn a repeatable job into a saved skill you run forever with one line.

12

Put It on a Schedule

Set a job to run on its own, like a weekly renewals check that emails itself.

F10

10 FRAMEWORKS. 12 LESSONS. ONE AI COWORKER.

WhereToBegin.ai
LEARN CLAUDE FOR YOUR AGENCY