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Cassidy AI Applied Automation

Build accurate, controlled, and practical AI-powered workflows.

FA-0126 · 2 Days

Automation, RPA & Power Platform

Introduction

Duration: 2 Days

Many business processes become slow because essential information is scattered across documents, inboxes, and workplace systems. Cassidy AI brings this information together through Knowledge Bases, configurable Agents, no-code Workflows, connectors, and organization-wide instructions, enabling teams to automate repeatable work while retaining human control.

This course focuses on designing dependable solutions that can review documents, retrieve approved information, structure business data, route exceptions, and support consistent decisions. The instructor has over 30 years of industry experience and will deliver real, industry-demanded content rather than an academic treatment of the subject.

Learning outcomes

Participants will be able to:

- Identify processes suitable for Cassidy AI automation
- Organize trusted information within a Knowledge Base
- Configure specialized Agents with clear instructions and restrictions
- Build multi-step Workflows using triggers, actions, and conditions
- Develop practical insurance and underwriting support processes
- Apply human review, testing, security, and governance controls

Prerequisites

- Basic familiarity with Cassidy AI
- Understanding of routine insurance and underwriting processes
- Access to an approved Cassidy AI workspace
- Approved non-confidential training documents
- No programming experience required

Training outline

1. Planning Cassidy AI Solutions

Process selection

1. Repetitive administrative activities
2. Document-intensive processes
3. Information retrieval activities
4. Review and approval processes

Process mapping

1. Required inputs
2. Processing stages
3. Decision points
4. Exceptions and referrals
5. Expected outputs

Responsibility boundaries

1. Automated activities
2. AI-assisted activities
3. Human-controlled decisions
4. Restricted actions
5. Process ownership

2. Building Trusted Knowledge and Agents

Knowledge Base organization

1. Underwriting guidelines
2. Risk appetite documents
3. Policy wordings
4. Authority limits
5. Operating procedures

Knowledge quality

1. Approved information sources
2. Document versions
3. Effective dates
4. Conflicting information
5. Outdated information

Agent configuration

1. Agent purpose
2. Required knowledge
3. Operating instructions
4. Output structure
5. Escalation requirements

Agent controls

1. Missing-information handling
2. Assumption prevention
3. Source-grounded responses
4. Decision limitations
5. Confidentiality restrictions

3. Designing Multi-Step Workflows

Workflow structure

1. Workflow objectives
2. Required inputs
3. Processing actions
4. Conditions and branches
5. Completion requirements

Workflow triggers

1. Manual initiation
2. Form submissions
3. File uploads
4. Email events
5. Scheduled events

Workflow actions

1. Knowledge retrieval
2. Document analysis
3. Information extraction
4. Agent execution
5. Notifications and updates

Workflow controls

1. Required-field checks
2. Eligibility conditions
3. Referral conditions
4. Approval conditions
5. Failure handling

4. Insurance and Underwriting Applications

Submission intake

1. Document classification
2. Applicant information extraction
3. Coverage information extraction
4. Exposure information extraction
5. Completeness checks

Underwriting review

1. Guideline retrieval
2. Risk appetite alignment
3. Risk information summaries
4. Missing-information identification
5. Exception identification

Referral preparation

1. Referral reason
2. Relevant guideline
3. Supporting information
4. Authority position
5. Required decision

Renewal support

1. Expiring policy information
2. Exposure changes
3. Claims developments
4. Coverage changes
5. Outstanding requirements

Business communications

1. Submission acknowledgements

2. Information requests
3. Referral notifications
4. Status updates
5. Review summaries

5. Human Review and Approval

Review requirements

1. Risk-based review
2. Exception-based review
3. Authority-based review
4. Communication review
5. Final approval

Review outcomes

1. Approval
2. Rejection
3. Correction request
4. Additional information request
5. Manual processing

Approval records

1. Reviewer identity
2. Review outcome
3. Supporting information
4. Reviewer comments
5. Completion status

6. Testing, Governance and Deployment

Agent testing

1. Normal requests
2. Incomplete information

3. Conflicting information
4. Restricted requests
5. Escalation conditions

Workflow testing

1. Standard processing paths
2. Conditional paths
3. Referral paths
4. Approval paths
5. Failure paths

Output validation

1. Accuracy
2. Completeness
3. Consistency
4. Source support
5. Business-rule compliance

Governance controls

1. Approved use cases
2. User permissions
3. Confidential information
4. Human accountability
5. Change management

Operational deployment

1. Pilot implementation
2. User responsibilities
3. Performance monitoring
4. Issue management
5. Continuous improvement

Disclaimer

This course outline is provided as a general instructional guideline and does not constitute a fixed or contractually binding programme. The trainer reserves the right to amend, reorganize, substitute, expand, reduce, or omit topics when reasonably necessary to address participant requirements, organizational priorities, platform developments, operational constraints, or professional considerations, without prior notice.

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