RYAN ZSCHAU | VIRTUAL INSURANCE ASSISTANT

QUICK START GUIDE



Set up an email address for Ryan's access. Email within the same domain is considered more secure. Google Suite highly recommended.



Select a Task needing completion. Generate appropriate login credentials for carrier website or management system for Ryan's access.



Record screen with optional voice instructions while you complete this task. I recommend MOVAVI or SNAGIT Screen capture programs. This allows you to record your screen and add any voice tips/tricks as you complete a task. With a complete workflow generated in a simple to watch video, you have not wasted any time drafting any additional notes. Share via Google Drive.



Ryan reviews and learns your video workflow and completes the tasks you assign via email. Repeat steps 2 and 3 for any additional task. It's just that easy to save your precious time.

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