

Applied Epic[®] is the world's most widely used broker management platform.



Applied Epic is a complete out-of-the-box broker management platform that delivers core capabilities to manage all policy and servicing workflows, online customer interactions, and eTrading connectivity across Personal and Commercial Lines of business.

With Applied Epic, you can eliminate the time and money spent managing and training employees on multiple systems. All roles, locations, and lines of business can be managed in this single platform to give you a crystal-clear picture of your entire organisation.

Using open and scalable architecture, Applied Epic supports acquisitions and integrations of both Applied and third-party applications to guarantee productivity and profitability as the needs of your business change.

Power your business with an integrated system that provides you the choice and flexibility to build your tech stack to meet the needs of your customers, team and partners.

Allows your business to

- Reduce operating costs and gain greater business insights
- Build an agile technology strategy on an open and secure platform
- Improve customer retention and acquisition while keeping employees happy and productive
- Partner with practical innovators who understand the business of global insurance and provide unrivaled security, support, and success to your business

“The technology landscape is evolving quickly, so it was important for us to have a broker management system that is flexible and stays ahead of the pace of change. Applied Epic gives us the automation to reduce manual administrative tasks and create frictionless, digital experiences for our customers and staff that support our growth goals.” – Andrew Rigby, Director, Rigby Financial



Core Capabilities

Manage All Lines of Business

Shows all lines of business holistically, in one place, so you never have to leave your system.

Renewal Management

Easily view, process and track all renewals in one place with a single renewal manager for all lines of business, including EDI, Manual and Scheme policies.

Process Management and Automation

Automates and adapts the most frequently used workflows to ensure consistency across all users and locations through business process management capabilities and pre-built workflows.

Sales Automation

Integrated sales automation makes your management system the only place you need to go to view, monitor, track and forecast new business opportunities and renewals. From there, it connects with world-class CRM technologies to give you a 360-degree view of customers.

Document Management

Streamlines the management, organisation and security of documents based on your business's guidelines or your own customised process. Allows you to keep it simple or create deep folder hierarchies. Searches, creates reports, tracks history and/or versions at all levels.



Five of the top 10 largest global brokers utilise Applied Epic.

Source: Business Insurance

Multichannel Customer Service

Easily integrates with your customer self-service portal and mobile app so you can give customers the freedom to access their policy information anytime, anywhere.

Reporting and Data Analytics

Displays graphical business insights from your existing management system data. Use it to target where you can boost employee productivity and focus on the most profitable customer and insurer relationships.

Integrated eTrading

Automates the exchange of information with your insurers so you can eliminate redundant data entry and deliver faster, more complete service to customers.

Have Questions?

Call +44 (0) 1273 852000

Visit appliedsystems.co.uk