

MEET CUSTOMERS WHERE THEY ARE

# Applied Mobile<sup>®</sup> is a mobile application for insurance brokers.



**Our broker mobile application Applied Mobile is the first of its kind in our industry that lets your team access and manage customer, prospect and overall business information in your management system anytime, anywhere via a smartphone or tablet.**

Applied Mobile unchains your employees from their desks and the 9 to 5 servicing constraints by giving them mobile access to the information in your Applied Epic<sup>®</sup> management system.

The app lets your team service customers on the go with the ability to view accounts, contact details and insurance policy information; add prospects; create and manage activities; and automate sales operations.

All activities recorded within the app then sync back to your management system to ensure your team always has access to the latest customer and prospect details.

Give your team the flexibility to do their job anytime, anywhere while driving employee satisfaction, retention and cost savings.

## Allows your brokerage to

- Increase effective account management and staff productivity
- Elevate your role as trusted advisor
- Grow your book of business with increased sales and renewals

“Mobility isn’t an option anymore, it’s a requirement and critical to run a business. With Applied Mobile, we can answer critical questions, which increases staff productivity and helps us take advantage of new sales opportunities with information on the go.”

– Dayton Kilgus, Manager/Producer, Metz Stoller Inc.



## Core Capabilities

### On-Demand Access to Information

Provides direct access to information in your brokerage management system from your mobile phone or tablet so you can service customers while away from the office.

### Sales Automation

Lets you view, add and manage sales opportunities directly from your mobile device with information automatically updated in your management system, providing full staff visibility.

### Risk Analysis

Embedded risk analysis surveys provide access to narratives, survey coverage assessments and supplemental data about your clients' specific type of business. Once you've completed the risk analysis, you can save within the application, email, print or add as an attachment on an activity and sync back to an account in your management system.

### Claims Management

Allows you to record a claims event in the field with relevant client details. Information then syncs to your management system so that staff back at the office can begin processing the claim for faster customer service.



**78% of survey respondents said access to the technology they like to use, such as mobile, makes them more effective at work.**

Source: PwC

### Real-Time Activity Sync

Real-time synchronization between the app and your management platform ensures account information, including activities, is current, accurate and protected.

### Native Mobile Capabilities

Uses mobile native applications, like maps, to pinpoint nearby locations for impromptu meetings and communication channels to call or send email and instant messages to clients, prospects and colleagues.

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### Have Questions?

Call 866.899.5120

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