

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 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 business to

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

“Our sales people are busy people, Applied Mobile gives them the ability to take notes and not wait until the end of the day to get the information to the account executives.”

– William Cooper, Managing Director, Stanhope Cooper



## Core Capabilities

### On-Demand Access to Information

Provides direct access to information in your broker management system from your mobile phone or tablet so you can service customers whilst 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.

### 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 employees back at the office can begin processing the claim for faster customer service.

### 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 customers, prospects and colleagues.



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

Source: PwC

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### Have Questions?

Call +44 (0) 1273 852000

Visit [appliedsystems.co.uk](https://appliedsystems.co.uk)