



Top 5 Reasons to Migrate to Applied Epic



The management system is the backbone of your brokerage, so upgrading your solution is an important decision. Canadian brokers have been selecting Applied Epic as the all-in-one solution to manage all aspects of the brokerage, including both P&C and Benefits lines of business, sales automation, insurer connectivity, data analytics, customer service technology, marketing automation, and more. There's a reason why it's the #1 management system in the world.

As you begin evaluating your change management journey, we've outlined a few advantages Applied Epic so you can maximize digital opportunities.

1. Manage your P&C and Benefits business in one place

Management systems aren't just for P&C brokerages anymore. Brokers are utilizing Applied Epic for their Benefits books of businesses providing a single view of their business. This centralizes your data and gives you a holistic view of clients so you can easily identify opportunities to account round or cross-sell.

2. Meet customers where they are

Today's consumers have come to expect a digital experience from every company they do business with, including yours. Applied Epic easily integrates with our Applied WebRater and Applied CSR24® self-service quoting, portals, and mobile apps so that your prospects and customers can access quotes and their policy information when and how they like. It also integrates with third-party eSignature tools (like DocuSign, Right Signature, and FormStack) so you no longer have to print, scan, email or fax documents to clients for their signature. This equals more time and money back in your pocket.

The demand for simple customer experiences extends to how customers pay their insurance premiums. Applied Epic seamlessly integrates with Applied Pay™, our digital payments platform that provides a safe, convenient way for insureds to pay their premiums online from any device. Applied Pay offers a modern checkout experience and flexible payment options, including EFT, credit, and debit cards, and more, giving customers the power to pay how they choose. Plus, it shortens collection time and reduces check processing tasks so you can realize deposits (aka profits) much faster.



3. Empower your team to work from anywhere

Consumers expect the same digital experiences they get in their personal lives from the workplace too. Applied Epic offers employees a simple, intuitive user experience. In just a few clicks, they can view account and policy details, complete a quote, file a claim, and remarket a renewal. It's a system that they'll not only love working in but can access from anywhere via a browser. Plus, it integrates with our broker app Applied Mobile® so staff can access and manage customer, prospect, and overall business information in your management system while on the go.

4. Gain better business insights

There's a ton of data in your management system, but do you understand what all this data is saying and are you able to act on it quickly? Applied Epic can help you do just that from the moment you log in! Each user can customize their home screen with graphical dashboards showing the metrics that matter most to their role. It also integrates with our data analytics solution Applied Analytics® for a deeper level of analysis.

5. Deliver timely, relevant content

Today, consumers are overwhelmed with information from every direction. This makes reaching them with the right messages at the right time more important than ever. Applied Epic includes built-in marketing capabilities that enable you to create a distribution list and send marketing campaigns. If you need more in-depth marketing functionality, the platform integrates with Applied Marketing Automation™, our marketing automation application that allows you to build and track marketing campaigns that deliver relevant and timely content to both P&C and Benefits clients and prospects. Through more targeted campaigns and content, you can elevate your role as a trusted advisor while growing your book of business.

Applied is here as your technology partner.
Visit appliedsystems.ca to learn more and get started.

