

Managing Your Brokerage

Applied CRM is the leading Salesforce-based customer relationship management system built for the insurance industry.

Extend your brokerage management system and more closely manage your sales pipeline. Built 100% natively in the world's #1 CRM platform Salesforce, Applied CRM is a cloud-based, analytics-driven customer relationship application designed to work for the specific needs and business requirements of insurance brokerages.

With access to Salesforce AppExchange, you can integrate additional applications to further expand your sales and marketing strategy.

Directly integrated with your management system workflows, Applied CRM makes expansion easy and delivers fast time-to-value in the management of your customer relationships.



Enables your brokerage to

- Create a personalized sales journey across all communications channels for every customer.
- Empower front-office staff with the data insights into sales pipeline needed to close deals quicker.
- Extends your management system to thousands of apps available on the Salesforce AppExchange.



Core Capabilities

Lead management

Track your leads from click to close, while continually optimizing your campaigns across every channel. Make smarter decisions about where to invest your marketing dollars.

Opportunity management

Get a complete view of your team's deals with Opportunity Management. See stage, products, competition, quotes, and more. Stay connected to the people and information you need to close every sale.

Sales forecasting

Fast, easy, accurate. Get a real-time view into your team's forecasts. Use in-line editing, override visibility, multicurrency support, and more to stay on top of your business.

Reports and dashboards

Dashboards offer a real-time picture of your sales at a glance. Dig deeper with detailed reports that anyone can create – and can access from anywhere.



#1 CRM system in the world

Source: Applied Systems

Why Applied?

Applied Systems is the leading global provider of cloud-based software that powers the business of insurance.

Recognized as a pioneer in insurance automation and the innovation leader, Applied is the world's largest provider of agency and brokerage management systems, serving customers throughout the United States, Canada, the Republic of Ireland, and the United Kingdom.

Call 866.899.5120
Visit appliedsystems.ca