

Applied Epic for Salesforce™ is an insurance sales and marketing application.



We combined the #1 brokerage management system with the #1 CRM platform and gave you Applied Epic for Salesforce, the insurance-built sales and marketing application that allows your sales and servicing teams to work together efficiently in two separate, but completely synced, platforms.

Applied Epic for Salesforce provides tight integration between Salesforce and Applied Epic® so you can seamlessly exchange data between systems to ensure your front-office and back-office staff are always on the same page. Plus, you can manage updates to both systems in Applied Epic for Salesforce, saving you time and money.

Give your sales and marketing teams the power of Salesforce while keeping the rest of your business running in Applied Epic.

Allows your brokerage to

- Get the most value from your investments in Salesforce and Applied Epic
- Make the most out of connectivity and automation for your business
- Customize the application to suit your brokerage's needs
- Gather insights into how your team is performing and the health of your book of business

“The dashboards and reporting capabilities of Applied Epic for Salesforce really appealed to us. Another big thing was not having to rekey data in two different places. It saves a tremendous amount of time when we can input data into Salesforce and on the backend, the service team can access it.”

– Zack Brandau, Executive VP, Core Assurance



Core Capabilities

Applied Epic and Salesforce Integration

Seamlessly exchange data for accounts, contacts, policies, activities, attachments and more with a tight integration between Salesforce and Applied Epic. Data can flow one-way or bi-directionally between systems based on the unique requirements of your business.

Purpose-Built Data Model

A purpose-built data model that has account, policy and Applied Epic attachment components maps organizational structure by brokerage, branch, department, and profit centre, and aligns employee roles and security rights established in Applied Epic with Salesforce.

Reports and Dashboards

Detailed producer and manager dashboards provide insights into how your sales and servicing teams are performing. Access 50+ out-of-the-box insurance reports to quickly review the health of your book of business, upcoming renewals, and opportunities to determine how much new business you are bringing and keeping in your brokerage.

Cloud Choice

Built 100% natively on Salesforce, Applied Epic for Salesforce is designed to work across all Salesforce clouds, including Sales Cloud, Service Cloud, Financial Services Cloud (FSC) for Insurance, Marketing Cloud, and Community Cloud. Specific integrations have been built with Financial Services Cloud to integrate policy terms lines and brokerage structure.



Organizations that have adopted Sales Automation have seen a 45% increase in customer retention and a 37% increase in sales revenue.

Source: Salesforce

Activity Management

Keeps front-office and back-office staff on the same page with bi-directional activity data exchange. Activities can be managed at the work type and employee level, and can be initiated in either system, synced, and accessed by both sales and service reps so they can deliver a consistent message to prospects and customers.

Insurance Lead Management

Pushes a converted lead from Applied Epic for Salesforce into Applied Epic to establish account and contact details plus create an opportunity.

Renewal Management

Automates the renewal process by letting you schedule renewals to become open opportunities within Applied Epic based on criteria you've established, including days before expiration, structures, premiums, line of business and policy status.

Have Questions?

Call 866.899.5120

Visit appliedsystems.ca