

Managing Your Broker

Applied Epic[®] is the most widely-used broker management system in the world.

Applied Epic is the most technologically advanced cloud-based software application built for independent insurance brokers to automate business operations and drive connectivity to insurers and customers in the changing insurance marketplace.

The application enables your business to access and act upon a complete view of customers and prospects by each employee — regardless of role, time or location.

Purpose-built for insurance brokers, Applied Epic's integrated and open architecture provides essential capabilities for each stakeholder within your business to better manage customer relationships, sales opportunities, product choice, financial accounting, reporting, business processes, and policy administration across all lines of business and locations.

The application seamlessly integrates third-party applications, proprietary systems and other data sources to ensure you maintain a single view of your entire business. Applied Epic's unique software architecture provides scalability for your business to manage expansion and growth across multiple locations with ease.

“ Applied Epic is a foundation to provide exceptional service to our customers. It's business intelligence capabilities provides new analytics to drive our business forward. ”

Mary Lou Charles, VP of Operations, Western Financial Group



Enables your business to

- Manage all lines of business in a single application for better customer servicing and quicker identification of cross- and upsell opportunities.
- Standardise and automate workflows to increase data consistency for more accurate reporting and operational time savings.
- Support multiple locations and manage business expansion and with ease.
- Meet customer demand for omnichannel service through seamless integration with portals and mobile applications.
- Connect with insurer partners and access new markets to provide the best products and service to your customers.



Core Capabilities

Integrated trading

The integrated Personal and Commercial Lines applications enable you to provide greater advice and coverage for a customer's complete insurance needs. By utilising Commercial Lines or Personal Lines workflows in Applied Epic, you reduce the re-keying of customer information and create easily viewable documentation for auditing purposes. Integrated trading also eliminates the time and cost spent managing and training employees on two disparate systems, whilst ensuring you maintain a single view of your business.

Business process management and automation

Applied Epic provides greater business process management capabilities and pre-built workflows with myEpic, enabling you to automate and adapt the most frequently used workflows to ensure consistency across all users and locations. Integration with third-party tools also allows you to automate processes, like policy checking and producer licensing management, while keeping a single view of your business operations.

Customer relationship management and sales automation

Sales Automation allows you to view, monitor, track and forecast new business opportunities and renewals directly within the application, eliminating the need to invest time and expense in separate solutions.

Document management

Superior document management capabilities allow for multiple folder levels, search, report and tracking of history and versions at the client and supplier level. The application enables you to manage and organise documents according to your unique process guidelines, whilst providing secure and ready access to documentation from a single source.

Omnichannel customer service capabilities

Applied Epic seamlessly integrates with Applied CSR24, Applied MobileInsured and Applied Mobile to enable omnichannel quoting and customer service, including email, SMS, client portal and mobile apps.



Five of the top ten largest global brokers utilise Applied Epic.

Source: Business Insurance

Why Applied?

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

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

Call +44 (0) 1273 852000
Visit appliedsystems.co.uk