

Managing Your Brokerage

# Applied Marketing Automation™ is the industry's first natively integrated marketing automation application.

**Applied Marketing Automation allows brokers to quickly build and track marketing email campaigns that deliver relevant, timely content to P&C and Benefits clients and prospects.**

Directly integrated into Applied Epic®, you can immediately launch Applied Marketing Automation from the management system to manage marketing communications, ranging from one-off communications to robust marketing campaigns that nurture customers and prospects on relevant topics.

The application provides reporting insights and email marketing statistics that can be used to evaluate the success of a campaign and inform future campaign decisions.

Leveraging the applications industry-specific curated content, your brokerage can target the right audience with the right message at the right time, further elevating your role as a trusted advisor while growing your book of business.

**“ Managing contacts and their marketing subscriptions in one system versus three will be a big timer saver for us.”**

Phyllis Davis, AVP Training and Compliance, Hibbs, Hallmark & Company



## Enables your brokerage to

- Keep renewals high and engage prospects with timely, provincially relevant P&C and Benefits content based on account and policy/plan information.
- Save time and expenses by eliminating the need to invest, manage, and input information into separate, disparate marketing automation and content management systems.
- Gain greater visibility into marketing campaigns metrics to identify successful campaigns that are driving the most revenue.
- Ensure compliance with email marketing laws and other regulatory restrictions.



# Core Capabilities

## Campaign Management

Tapping into our robust content library, you can quickly send a one-off piece of relevant content to a single client or setup and schedule a more complex, recurring automated marketing campaign to drip/nurture information to a select audience. Develop your own recurring newsletter campaigns, or send campaigns Applied has specially curated to deliver timely information that is important to employers.

## Content Library

The robust content library provides you more than 1,000 pieces of P&C and Benefits specific content branded to your brokerage across a variety of content types, including articles, infographics, toolkits, checklists, among others to engage your customers and prospects. Curated and developed by a dedicated Canadian editorial team, content is kept up-to-date, and new pieces are added frequently to keep your communications relevant and timely.

## Sales Management

Directly integrated with Applied Epic, actions you take within Applied Marketing Automation can quickly trigger your preferred marketing or sales workflow leveraging Sales Automation capabilities and opportunity management within Applied Epic.

## Contact and List Management

Targeting capabilities allow you to create hyper-targeted prospects and client's campaigns leveraging contact, account and policy/line information from Applied Epic. Ensure your brokerage is also in compliance with email marketing laws by easily managing subscription preferences.

## Reporting and Analytics

Native reporting provides insight into the success and effectiveness of your marketing campaigns through embedded reporting to track the messages and content your audiences are engaging with the most, allowing you to easily adapt your campaigns for maximum effectiveness.



**88% of users are more likely to respond favourably if the email is personalized.**

Source: DynamicYield

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## 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](https://www.appliedsystems.ca)