

Managing Your Brokerage

Applied Mobile® is the first insurance broker mobile application to bring client, policy and sales information to mobile devices.

Applied Mobile is a purpose-built mobile app that enables insurance brokerage staff to access and manage customer, prospect and overall business information anytime, anywhere via a smartphone or tablet.

Applied Mobile provides staff away from the office with a direct link to information in your management system and synchronizes information back to the system to ensure your staff always has access to the latest customer and prospect details.

Applied Mobile allows staff to view accounts, contact details and insurance policy information; add prospects; create and manage activities; and automate sales operations. The application also has risk assessment tools that enable producers to accurately sell more lines of business.

Applied Mobile delivers crucial information to your staff when and where they need it most to drive business growth and profitability.

“ The 24/7 real-time access of customer data via Applied Mobile ensures our staff meet customer needs immediately and act as trusted advisors in the field.”

Daniel Maisonneuve, Co-Owner, MLS Insurance Brokers



Enables your brokerage to

- Conduct more business outside the office with on-demand access to a single, up-to-date view of customer and business information.
- Extend omnichannel customer service through instant access to current customer account details, policy information and risk management tools while away from the office.
- Access and manage new business opportunity information to encourage prospect follow-up and quicker sales close rates.
- Keep customer and prospect information current, synchronized and safe between the app and your management system.



Core Capabilities

On-demand access to information

Available for smartphones and tablets, Applied Mobile provides convenient, on-demand access to critical agency resources and client and prospect insurance information in your management system to provide optimal customer service at all times.

Sales automation

Seamlessly integrated with Applied Epic, the app provides sales automation capabilities so your staff can view, add and manage sales opportunities.

Risk analysis

Applied Mobile Risk Analysis tools enable your producers to gather the information required to accurately assess client risk to write the business successfully regardless of their industry focus. Once completed, a Risk Analysis generated by Applied Mobile can be saved within the application, emailed, printed, or added as an attachment on an activity and synced back to an account in your management system.

Claims management

Your staff can record a claims event in the field with relevant client details and sync that information back to the management system, accelerating the claims submission process for auto and property policies.

Real-time activity sync

Applied Mobile provides real-time synchronization between the app and your management system to ensure current, accurate account information, including activities, is available and protected.

Native mobile capabilities

Applied Mobile leverages tools already installed on tablets and smartphones, like GPS technology, to map accounts and schedule meetings.



76% of Millennials believe having mobile service is very important.

Source: IDG Research Services

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