

Increase Visibility into your Sales Pipeline with Applied Epic®

Applied Epic, the fastest-growing cloud-based agency management system in the world, provides essential capabilities for you to better manage sales opportunities so that you can make more informed decisions about your business and capitalize quickly on new opportunities.

More than ever, a greater emphasis is being placed on agencies to sell both efficiently and effectively. Applied Epic Sales Automation is the industry's first fully-integrated sales opportunity, pipeline, forecast and activity manager. It provides a single view of your prospects and customers within Applied Epic, eliminating the need to invest in separate systems to manage sales pipeline.

Applied Epic Sales Automation provides your agency with:

- Role-based, intuitive dashboards that offer a visual representation of performance against individual sales goals and sales opportunities.
- Greater visibility into your sales pipeline – both for prospective and current clients – to more closely forecast and track new business opportunities and renewals directly within the application.
- Ability for sales teams to manage their pipeline, forecast premium/revenue and follow the sale from lead to insured.

“ Having an integrated sales tool lets us track sales and hold people accountable, which is extremely valuable to us and impacts our bottom line. ”

Timothy Heim, Vice President, HHM Insurors

Enables your agency to

- Execute a sales strategy with customizable best practice sales process management capabilities
- More closely forecast and track revenue opportunities
- Manage sales pipeline through role-based dashboards

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 800.999.5368
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