

Indio is the solution to digitize the insurance application and renewal process.

Indio is a modern solution that enables agencies to automate internal application and renewal processes, eliminating redundancies in data gathering to minimize E&O and provide insureds a simpler, more collaborative customer experience.

Indio provides a fully digital client risk capture and application experience by automating the data population across individual, unique insurer applications.

The application uses smart-form automapping to reduce the need for rekeying client information across multiple applications, increasing efficiency while reducing errors and omissions.

With Indio, customers can have multiple agency staff members participate in the application process, tracking individual edits and allowing for collaboration on responses.

Indio simplifies the insurance application process to make it faster, more collaborative and easier, and minimize errors and omissions, saving you and your clients time and money.

“ We sent an application to a client [using Indio] and within 12-minutes we had back the completed application signed. ”

Allan Morton Jr., President, Morton Insurance & Risk Management



Enables your agency to

- Significantly reduce duplicate data entry and time wasted compiling multiple insurance applications.
- Automate the data population across multiple insurer applications to eliminate duplicate data entry for customers while reducing errors and omissions risk.
- Simplify the application process for prospects and customers so you can more effectively cross-sell/round out accounts and increase customer retention.

indio

Core Capabilities

Extensive application library

Indio provides access to more than 10,000 digitized insurance applications, including common forms, supplemental insurer applications, custom agency applications and questionnaires to create a single data capture process and simplified data mapping to automate application completion for your agency.

Track client application process

Intelligent activity tracking capabilities in Indio alert you when clients sign in, fill out information, sign forms, and submit data. This eliminates unnecessary effort spent on sending emails asking the client their status during the application process.

Renewal automation

Indio makes renewals fast and easy. Start the process with one click and have all data from the previous year's application pre-filled.

Control form appearance

Indio's smart forms give you the option to mark certain application sections (or questions) "Required" and to hide others. Eliminating certain pages or questions from an application helps you simplify the application process, remove client confusion, and get completed applications to market faster.

Smart change tracking

With Indio, you no longer have to dig through hundreds of spreadsheet rows to find information that the client changed. The application intelligently shows you what's changed from year to year, saving you significant time and alleviating E&O exposure.

Import schedule workbooks

Indio lets you upload existing schedule workbooks and then instantly turns them into interactive online tables of schedule data.

Signatures made easy

Indio provides robust e-signature capabilities that make it fast and easy to send, sign, and return forms, even from mobile devices. E-signatures are built within smart forms, so clients can sign off immediately at the end of the form.



Indio shortens the application and renewal process for brokers by up to 50%

Source: Indio

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.

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