



Top 6 Reasons to Migrate to Applied Epic



The management system is the backbone of your agency, so upgrading your solution is an important decision. We're here to help you find the one best suited for your agency and we think Applied Epic® could be it.

This all-in-one solution has everything you need to manage all aspects of your agency, including both P&C and Benefits lines of business, sales automation, market access and quoting, insurer connectivity, data analytics, customer service technology, marketing automation, and more. There's a reason why it's the #1 management system in the world.

To help you in your decision-making process, we've outlined a few advantages Applied Epic offers so you can see if it's the right choice for your agency.

1. Manage your P&C and Benefits business in one place

Management systems aren't just for P&C agencies anymore. Applied Epic incorporates native Benefits functionality so you can easily manage both your P&C and Benefits books of businesses in a single platform. This centralizes your data and gives you a holistic view of clients so you can easily identify opportunities to account round or cross-sell. Epic Benefits provides unique Benefits-specific screens to capture general plan information, rates, coverages, eligibility criteria, stop loss and TPA information. Direct integration with Applied Benefits Designer™ provides access to custom form management and templates that beautifully present RFPs and plan summaries.

2. Meet customers where they are

Today's consumers have come to expect a digital experience from every company they do business with, including yours. Applied Epic easily integrates with our Applied CSR24® customer self-service portal and mobile app so that your customers can access their policy information when and how they like. It also integrates with third-party eSignature tools (like DocuSign, Right Signature, and FormStack) so you no longer have to print, scan, email or fax documents to clients for their signature. This equals more time and money back in your pocket.

The demand for simple customer experiences extends to how customers pay their insurance premiums. Applied Epic seamlessly integrates with Applied Pay™, our digital payments platform that provides a safe, convenient way for insureds to pay their premiums online from any device. Applied Pay offers a modern checkout experience and flexible payment options, including ACH, credit and debit cards, and more, giving customers the power to pay how they choose. Plus, it shortens collection time and reduces check processing tasks so you can realize deposits (aka profits) much faster.



3. Empower your team to work from anywhere

Consumers expect the same digital experiences they get in their personal lives from the workplace too. Applied Epic offers employees a simple, intuitive user experience. In just a few clicks, they can view account and policy details, complete a quote, file a claim, and remarket a renewal. It's a system that they'll not only love working in but can access from anywhere via a browser. Plus, it integrates with our agent app Applied Mobile® so staff can access and manage customer, prospect and overall business information in your management system while on the go.

4. Gain better business insights

There's a ton of data in your management system, but do you understand what all this data is saying and are you able to act on it quickly? Applied Epic can help you do just that from the moment you log in! Each user can customize their home screen with graphical dashboards showing the metrics that matter most to their role. It also integrates with our data analytics solution Applied Analytics® for a deeper level of analysis.

But if you don't believe us when we say Applied Epic has great reporting and data analytics capabilities, just listen to your peer Bettie Baggette at Higginbotham Insurance Agency.

"Applied Epic has helped me be better at my job from an operational standpoint through reporting. We can report on so many different criteria within just a few minutes that our past legacy system couldn't provide. I believe Applied Epic is stellar in that area."



5. Deliver timely, relevant content

Today, consumers are overwhelmed with information from every direction. This makes reaching them with the right messages at the right time more important than ever. Applied Epic includes built-in marketing capabilities that enable you to create a distribution list and send marketing campaigns. If you need more in-depth marketing functionality, the platform integrates with Applied Marketing Automation™, our marketing automation application that allows you to build and track marketing campaigns that deliver relevant and timely content to both P&C and Benefits clients and prospects. Through more targeted campaigns and content, you can elevate your role as a trusted advisor while growing your book of business.

6. Get fast, accurate quotes

Many agencies feel they spend too much time retrieving quotes from multiple insurer sites. Or worse, that quotes often lack accuracy, resulting in a poor client experience. You need a way to deliver fast, accurate quotes to your clients. Applied Epic allows you to quote Personal Lines and Commercial Lines policies without leaving your daily workflow. Embedded quoting reduces redundant data entry and makes for more efficient quoting with insurers directly in your management system so you can make sure your customers get the best products at the right price – all with fewer clicks.

Still not convinced Applied Epic is the best fit for your agency? Our EZLynx management system is a great option too! It includes some of the same customer service, marketing and quoting capabilities as Applied Epic but it's geared toward agencies focused on Personal Lines with a mix of small commercial (and likely growing!). [Schedule a time to speak with one of our team members](#) to see which management system is better suited for your needs. It's your choice.

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