



# Applied Epic vs. Marketing Automation

## **What are Applied Epic Marketing Campaigns?**

Marketing Campaigns are a functionality within Applied Epic that allow users to send mass communications to contacts that are stored within Applied Epic. To send or schedule a marketing campaign, a user must run a marketing report in Applied Epic and choose the output of the campaign such as e-mail or SMS. Email templates sent out through Marketing Campaigns can be customized through word.

## **What is Applied Marketing Automation?**

Applied Marketing Automation is a browser based, content driven marketing platform. Individuals will access Applied Marketing Automation outside of their Applied Epic environment but will have the contact information stored in Applied Epic at their disposal. Users can attach content to e-mails that they send out to contacts, and they can create multiple branding profiles to address specific consumer experiences.

## **When do I use Marketing Automation in Epic vs the new Applied Marketing Automation tool?**

Applied Epic's base functionality includes marketing. This means you can run a report to create and filter a list, and send an email, text or attachment to those contacts based on information in their client record. Applied Epic also has the ability to generate an email, text or attachment based on rules within an activity to a specific individual you determine. These functionalities are effective and efficient ways to communicate with your customers in service workflows, and will continue to be a key part of the base functionality of Applied Epic.

However, the nature of marketing is different. Businesses need to engage with their customers through many touchpoints a month; some consultative and informative, some to round out conversations, and others purely sales-driven. Rules and regulations vary by country, state, and province, but all require interaction with a contact to ensure they wish to be solicited. While that communication is under regulatory scrutiny if the contact is not an active contracted account with your business, even those that are may wish to make a choice on what type of engagement they have with your business. Applied Marketing Automation is tailored for this use. Managing the opt-in/opt-out and subscriber process agents and brokers and communicate with confidence to leads, prospects and customers alike. Further, Applied Marketing Automation enhances that communication by storing and sharing insights on the success of the email campaign. Intended for customers and prospects alike, Applied Marketing Automation is intended to be used as the consultative tool for your whole organization to enhance their engagement strategy beyond the service-focused email system within Applied Epic.

Functionality	Applied Marketing Automation	Epic Marketing Campaigns
Ability to send mass emails	Yes	Yes
Able to Customize Emails	Yes, in browser	Yes, in word
Ability to attach content	Yes, in browser	Yes, in word
Ability to send SMS	Future Roadmap Item	Yes



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