

Managing Your Brokerage

Applied Epic[®] is the most widely-used brokerage management system in the world.

Applied Epic is the most technologically advanced cloud-based software application built for independent insurance brokerages to automate business operations and drive connectivity to insurers and insureds in the changing insurance marketplace.

The application enables your brokerage to access and act upon a complete view of customers and prospects by each of your staff – regardless of role, time or location.

Purpose-built for insurance brokerages, Applied Epic's integrated and open architecture provides essential capabilities for each stakeholder within your brokerage to better manage customer relationships, sales opportunities, financial accounting, reporting, business processes, and policy and benefits administration across all lines of business and locations.

The application seamlessly integrates third-party applications, proprietary systems and other data sources to ensure you maintain a single view of your entire business. Applied Epic's unique software architecture provides scalability for your business to manage expansion and growth across multiple global locations with ease.

“ Moving to Applied Epic was a game changer and aligned with our business plans.”

Karen Hofflin, VP, Go Insurance



Enables your brokerage to

- Manage all lines of business in a single application to provide greater visibility for better customer servicing and quicker identification of sales opportunities.
- Standardize and automate workflows to increase data consistency for more accurate reporting and operational time savings.
- Support multiple regional locations and manage business expansion and growth with ease.
- Meet consumer demand for omnichannel service through seamless integration with portals and mobile applications.
- Connect with insurer partners to provide the best policies and service to your customers.



Core Capabilities

P&C and benefits management

The integrated application enables you to provide greater advice and coverage for a customer's complete insurance needs.

Managing both business in a single application eliminates the time and cost spent managing and training staff on two disparate systems and enables you to maintain a single view of your business.

Business process management and automation

Applied Epic provides greater business process management capabilities and pre-built workflows with myEpic, enabling you to automate, adapt and reassign the most frequently used workflows to ensure consistency across all users and locations.

Customer relationship and sales automation

Epic Sales Automation allows you to view, monitor, track and forecast new business opportunities and renewals directly within the application, eliminating the need to invest time and expense in separate solutions.

Document management

Superior document management capabilities in Applied Epic allow you to create multiple folder levels, search, report, and track history and versions at the client and vendor level. You can manage and organize documents according to your business process guidelines while providing secure and ready access to documentation from a single source.

Multichannel customer service capabilities

Applied Epic seamlessly integrates with Applied CSR24, Applied MobileInsured and Applied Mobile to enable omnichannel quoting and customer service, including email, SMS, client portal and mobile apps.



Five of the top 10 largest brokerages utilize Applied Epic.

Source: Business Insurance

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