

Managing Your Business

# Applied TAM<sup>®</sup> is the industry's pioneering broker management system.

**Applied TAM provides insurance brokers the ability to automate daily operational processes, effectively manage client policy information and connect with insurers and insureds.**

Through an automated and easy-to-navigate interface, Applied TAM offers your business greater visibility into client information and day-to-day operations to reduce time spent on administrative tasks; decrease errors and omissions risk; provide a seamless employee onboarding and training experience; and better respond to client needs.

The application connects your broker with insurer partners so staff can gain greater access to markets and automate servicing as part of daily system workflows.

Applied TAM enables more independent insurance brokers to succeed in today's competitive business environment than any other management system in the world.

**“ Before Applied TAM, I didn't know if we were doing the right things. Now I have my hands around the data and insights into the business. With Applied, I know I'm doing it right.”**

Mary Lou Charles, VP of Operations, Western Financial Group



## Enables your business to

- Manage prospect, client, accounting and policy management workflows with fewer keystrokes.
- Increase visibility into your book of business and standardise data for consistent reporting and company-wide evaluation.
- Increase insurer connectivity to automate servicing requests and access markets.
- Customise invoices and statements to fit your business requirements.
- Simplify employee on-boarding and training with standardised and automated workflows.



# Core Capabilities

## Business process management and automation

Applied TAM standardises workflows via myTAM to automate daily business functions and lower operating expenses. myTAM enables you to manage renewals in advance with automated follow-up communication to customers. You also can lower E&O risk and ensure accurate reporting with prefilled fields throughout the system.

## Multichannel customer service

Applied TAM seamlessly integrates with Applied Mobile, Applied CSR24 and Applied MobileInsured to provide your staff and customers 24/7 access to insurance information.

## Integrated trading

The integrated Personal and Commercial Lines applications enable you to provide greater advice and coverage for a customer's complete insurance needs. By utilising Commercial Lines or Personal Lines workflows in Applied TAM, you reduce the re-keying of customer information and create easily viewable documentation for auditing purposes. Integrated trading also eliminates the time and cost spent managing and training employees on two disparate systems, whilst ensuring you maintain a single view of your business.

## Marketing campaign management

Your business can develop targeted marketing campaigns in Applied TAM with built-in marketing plans that allow easy access to coverage information. Applied TAM's reporting capabilities enable your staff to identify where to focus marketing campaigns for account rounding and cross-sell and up-sell opportunities.



**98% of independent brokers leverage their management systems for document management, sales automation, and reporting and accounting.**

Source: Business Insurance

## Why Applied?

Applied Systems is the leading global provider of cloud-based software that powers the business of insurance.

Recognised as a pioneer in insurance automation and the innovation leader, Applied is the world's largest provider of broker management systems, serving customers throughout the United States, Canada, the Republic of Ireland, and the United Kingdom.

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Visit [appliedsystems.co.uk](https://www.appliedsystems.co.uk)