

# Applied Mobile™

The first insurance agent mobile application to bring client, policy and sales information to mobile devices



Applied Mobile is a purpose-built mobile app that enables insurance agency staff to access and manage customer, prospect and overall business information anytime, anywhere via a smartphone or tablet.

Applied Mobile provides staff away from the office with a direct link to information in your management system and synchronizes information back to the system to ensure your staff always has access to the latest customer and prospect details.

Applied Mobile allows staff to view accounts, contact details and insurance policy information; add prospects; create and manage activities; and automate sales operations. The application also has risk assessment tools that enable producers to accurately sell more more lines of business.

*“Mobility isn’t an option anymore, it’s a requirement and critical to run a business. With Applied Mobile, we can answer critical questions, which increases staff productivity and helps us take advantage of new sales opportunities with information on the go.”*

- Dayton Kilgus, Manager/Producer, Metz Stoller Inc.

## **Applied Mobile enables your agency to:**

- > Conduct more business outside the office with on-demand access to a single, up-to-date view of customer and business information.
- > Extend omnichannel customer service through instant access to current customer account details, policy information and risk management tools while away from the office.
- > Access and manage new business opportunity information to encourage prospect follow-up and quicker sales close rates.
- > Keep customer and prospect information current, synchronized and safe between the app and your management system to ensure all staff have access to the latest information.



## Core Capabilities

### On-demand access to information

Applied Mobile instantly connects your staff in the field to information in your management system via a mobile app. Available for smartphones and tablets, Applied Mobile provides convenient, on-demand access to critical agency resources and client and prospect insurance information to provide optimal customer service at all times.

### Sales automation

Seamlessly integrated with Applied Epic, the app provides sales automation capabilities so your staff can view, add and manage sales opportunities.

### Risk analysis

Applied Mobile Risk Analysis tools enable your producers to gather the information required to accurately assess client risk to write the business successfully regardless of their industry focus. Once completed, a Risk Analysis generated by Applied Mobile can be saved within the application, emailed, printed, or added as an attachment on an activity and synced back to an account in your management system.

### Real-time activity sync

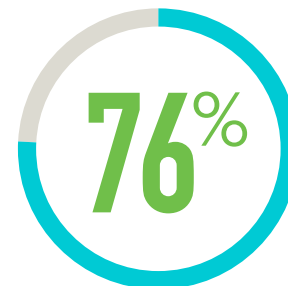
Applied Mobile provides real-time synchronization between the app and your management system to ensure current, accurate account information is available and protected. New activities are also pushed in real time to Applied Mobile, keeping staff informed while away from the office.

### Native mobile capabilities

Applied Mobile leverages tools already installed on tablets and smartphones, like GPS technology, to map accounts and schedule meetings. The app also connects you to communication channels to call, email or text message clients, prospects and colleagues.

## Getting started is easy

Learn how Applied can enable digital transformation for your business by calling **800.999.5368** or visit **appliedsystems.com** today.



76% of Millennials believe having mobile service is very important.

- Source: IDG Research Services

## 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.

By automating the insurance lifecycle, Applied's people and products enable millions of people around the world to safeguard and protect what matters most.