

Applied PerformanceManagement™

The industry's first data analytics solution built
for independent agencies

Applied PerformanceManagement is the only integrated data analytics solution that presents your management system data in an easy-to-understand visual interface.

Fully integrated with Applied Epic and Applied TAM, the application accesses, aggregates and analyzes your data to deliver multiple levels of analysis on key performance indicators across your agency's book of business, employee operations and insurer relationships.

Applied PerformanceManagement provides the business insights you need to make better business decisions and maximize profitable relationships with your customers and insurer partners.

“Applied PerformanceManagement allows us to view everything in terms of profitability, and lets us analyze our data in a way similar to larger captive agencies. Every key performance indicator is tied to monetary goals of our agency, so when we make changes, we can see the impact on our employees, clients and our bottom line.”

- Ryan Moniz, Director of IT, Anderson Insurance Associates

Applied PerformanceManagement enables your agency to:

- > Manage the impact of new, renewed and cancelled business.
- > Expand current and prospective customer relationships through visual analysis of your book of business and geographic distribution.
- > Optimize internal operations by comparing real-time data to historical employee performance trends, success rates and progress toward goals.
- > Focus on insurer partners most likely to provide a timely response and competitive policy for your customers.



Core Capabilities

Business retention and growth reporting

Applied PerformanceManagement analyzes client portfolio development, including new, renewed and cancelled business, over designated periods of time through the Executive Summary dashboard.

The Client Retention Summary dashboard includes metrics to review your agency's retention across client, policy, premium and revenue metrics.

Agency employee performance tracking

A consolidated view of internal operations provides you insights about business metrics.

View employee acquisitions, attrition, renewals and book of business over time; how quickly staff are completing tasks and activities; workflow bottlenecks; responsibility overlaps and which employees are hitting sales goals.

Insurer performance insights

Applied PerformanceManagement allows you to quickly assess insurer performance in terms of policy volume and revenue, new business and submission activities.

These insights enable you to quote and book policies with your most responsive insurers, ensuring you provide the best coverage to your clients while maximizing profitability.

Getting started is easy

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

TOP 25%

Data analytics make companies five times more likely to make decisions faster than their peers and likely to be in the top 25% of financial performance within their industries.

- Source: Bain & Co.

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.