AI Risk Intelligence

Revolutionizing CL renewals and prospecting through the power of AI with Applied Book Builder™

Applied Book Builder is an AI-powered risk intelligence tool embedded in Applied Epic® that helps you turn business information into actionable cross-sell, upsell, and new business opportunities.

With Applied Book Builder, you can leverage AI to enrich account records, highlight coverage gaps that put clients at risk, and generate business profiles for prospective clients, all under one system.

The AI-powered solution lets you quickly understand client needs and identify missing coverages, moving seamlessly between Epic Accounts and Book Builder profiles.

Eliminate inconsistent account management and hours spent piecing information together from multiple systems yourself, and embrace AI to streamline decision-making and focus on client relationships while driving profitable growth.

"Applied Book Builder flagged another business operating on the insured's property —something we didn't previously know. The underwriter was fine with the exposure, and it was a good catch that could've gone unnoticed."

Calli Loan
Sea Mountain Insurance

Enables your Agency to

- Grow a more profitable book by spotting cross-sell and upsell opportunities and identifying policies coming up for renewal
- Boost agent effectiveness as you replace hours of manual research with automatically enriched risk profiles
- Reduce risk and strengthen your retention as you ensure clients are fully protected by aligning policies with real business operations
- Build stronger proposals and quotes with accurate and complete account details

Core Capabilities

AI-Enriched Commercial Risk Profiles

Validates and augments account records with data from thousands of public sources. Automatically generates detailed risk attributes for each account that populate the Account Profile in Epic and connect directly to coverages.

Account Rounding for Renewals

Compares business risk attributes against existing policies in Epic to identify missing coverages and upsell opportunities. The built-in filters allow you to view approaching renewals within 120 days, giving you a clear path to address these potential coverage gaps before renewal deadlines.

Suggests Accounts for New Business

Analyzes prospective client risk attributes to identify exposure gaps and recommends relevant coverages. This supports producers as they build more competitive and complete quotes in Epic.

Advanced Account Filtering

Provides a view of accounts in one place and filters by account name, policy expiration date and servicing role, allowing agents to quickly prioritize opportunities. With activity and notes management, coverage findings are pulled into Epic Activities automatically and agents can select activities to update and view notes instantly.

Email Coverage Suggestions

Generates editable coverage suggestion email content that's tailored to the specific account's needs and attributes, saving time, improving client engagement, and helping you present the right coverage at the right time.

Insurance agencies can see a 25% potential boost in revenue by harnessing AI to help with cross-selling

Source: Bain & Co.

Have Questions?

Call 800.999.5368
Visit appliedsystems.com