



# Embracing the Future: Migrating to Epic Browser



The time for change is now, and we can't wait for you to join the thousands of users already using Applied Epic® Browser in Canada.

By making the switch, you are not just accessing new features – you are future-proofing your brokerage and setting the stage for growth and success. In the fast-paced world of insurance technology, staying ahead means staying current. The limitations of older management systems like Applied TAM®, alongside the evolving regulatory landscape and enhanced security measures, underscore the need for change.

# Why Epic Browser?

Epic Browser provides on-the-go access to your broker management system so you can work from anywhere. Its new modern design offers a more straightforward user experience, which means fewer clicks, fewer screens, and more native lookups and validation. With Epic Browser, you'll receive smaller, more frequent releases for more consumable updates and quicker value realization. You'll also get exclusive access to new features and enhancements only browser technology can support.

Here are three reasons to migrate to Epic Browser:



## Better User Experience

We know that the modern, simple user experiences you have with other applications like Uber or Shopify are the same experiences you want from Applied. Epic Browser uses new design architecture, allowing us to:

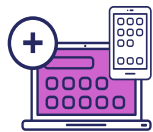
**Improve productivity and simplify workflows:**

Epic Browser delivers capabilities like data pre-fill/population and suggest-as-you-type functionality that allow you to work faster and have a more intuitive user experience.

**Support easier onboarding and training:**

Simplifying the workflows and user experience reduces complexity when bringing your team into the system.





# Smaller, More Frequent Updates

We’re completely transforming our technology, processes and infrastructure to push smaller, more frequent releases to you, allowing us to:

**Deliver new capabilities sooner:**

No more waiting for our once or twice-a-year releases to take advantage of new, innovative features that can help you improve efficiency and drive productivity with your team.

**Make releases more manageable:**

By releasing more frequently, we can minimize disruption to your business from having to understand, learn and implement at once a vast array of features traditionally made available in annual or bi-annual releases. Expect updates to have targeted persona-driven feature development so we can greatly impact specific users with each release.

**Be agile and more reactive:**

With the market changing rapidly, we need to implement changes in our products just as quickly — whether responding to your requests or incorporating new regulatory or compliance requirements.





## Greater Security, Better Accounting Functionality and Less Overhead

To build a strong team of insurance professionals for the future, it's vital to provide remote work flexibility and ensure your team has easy access to the essential systems. Epic Browser delivers the tools needed to make this possible, giving you the peace of mind that you can offer remote work capabilities while keeping your systems secure. Your team's ability to work from anywhere is essential, and Epic Browser can help make it a seamless experience.

### **Leverage Single Sign-On (SSO):**

Managing multiple usernames and passwords for different tools can be cumbersome. In addition, SSO has security and compliance benefits, and it's a no-brainer. Epic Browser will support Applied SSO, which has bring-your-own identity provider support. If you're looking for multi-factor authentication capabilities, you can leverage your existing identity providers to enable this.

### **Have less technology overhead and management:**

Moving to browser-native removes the overhead of deploying releases to the desktop app and the burden of costs around technology like Citrix/Terminal Server environments.

### **Visibility for better accounting and marketing:**

Easily access flexible and repeatable reports to manage commission agreements, direct bill reconciliation, and proactively begin to cross-sell and upsell campaigns.

### **Gain platform and device flexibility:**

Epic Browser provides you with a choice for the type of device you want to work on – tablet, phone, or desktop. It's supported on multiple browser platforms, like Chrome, Mozilla Firefox, and Edge, so you can use the best platform for your business.



# Sunsetting Applied TAM: The Need for Change

As we continue to assess our broker partners' needs and the evolving landscape, we have realized that Applied TAM's capabilities are no longer in line with the pace of change and client expectations. For example, the underlying components of Applied TAM's architecture will no longer receive critical updates from Microsoft®, posing risks to system performance and security.

We have decided to sunset Applied TAM in certain Canadian provinces. This initiative will support migration to Epic Browser by September 2025, giving you a year to assess the platform, transfer relevant data and manage all onboarding/training. The migration from Applied TAM to Epic Browser is a proactive measure to ensure you have access to cutting-edge insurance technology and features to provide your brokerage with the value, enhancements, and security it deserves.

# Frequently Asked Questions

Migration from Applied TAM to an open, cloud-based, all-in-one solution like Epic Browser marks a significant milestone. We understand that change can be daunting, but embracing change becomes essential as you envision your future. To help you with this process, we've compiled a list of questions that other brokerages have asked during the migration process.

**Q: How does the migration to Epic Browser impact current workflows and processes within the brokerage?**

One of the biggest fears about upgrading management systems is how staff will find time to learn and implement a new system while already carrying a heavy workload. Set aside time each week for your core team to complete implementation-related tasks to ensure you stay on track for your go-live date.



## EMBRACING THE FUTURE: MIGRATING TO EPIC BROWSER

Training is a crucial element to any successful migration. If you ask any broker that successfully migrated to Epic Browser the key to their success, most will say their staff put in the work to prepare. The team invested in the self-paced learning available and, therefore, embraced change.

Give your team the time they need to complete the necessary training so that you'll be ready when it comes time to go live. The more you know, the more you can achieve.

### **Q: What level of training and support will be provided during and after the migration process?**

The first step we recommend is to create a dedicated team responsible for managing the migration within your brokerage. These internal champions will advocate for change among the rest of your staff.

Change will be hard for some users, so having knowledgeable people onboard will help others in your brokerage be more optimistic about the road ahead. Your team will work directly with the Applied implementation team to coordinate a data review, roll out your training plan, set a go-live date and more.

Make sure each department is represented on your team and can participate in discussions and decisions. Clearly define goals, processes, and each person's role upfront. Then, set up recurring meetings to see how you're tracking and field any potential obstacles. Continue implementation team meetings after activation to ensure you get the most out of your new investment.

Visit the [Applied TAM Migration Resource Hub](#) for everything you need to know about migrating your heritage system to a more flexible, secure and scalable management system.

