

Applied Analytics[®] is a data analytics tool for insurance agents.



Our data analytics solution Applied Analytics is the first of its kind in our industry that acts as your data scientist to present your management system data in an easy-to-understand visual interface.

Fully integrated with Applied Epic[®], the solution accesses, aggregates and analyzes your data. The result is multiple levels of analysis on your book of business, employee performance, and insurer relationships so you can make more informed business decisions.

Make the shift from being a data-generating organization to one that is data-powered to drive greater productivity, simplicity and value for your business.

Allows your agency to

- Turn existing data into actionable insights so you can make quicker, more informed business decisions
- Focus on the most profitable client and partner relationships
- Get a snapshot of how your team is performing so you know where to focus resources
- Grow and retain your book of business using industry benchmarks

“Applied Analytics 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 Associate



Core Capabilities

Employee Productivity

User-friendly dashboards that show 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.

Client Retention

Displays a visual analysis of client, policy, premium and revenue retention with the ability to filter data to analyze quarterly and year-to-date.

Sales Performance

Employee Line of Business and Employee Summary dashboards provide a summary of new, renewed and cancelled business by employee at the policy level. There's also the option to evaluate revenue by employee.

Insurer Relationships

Insurer performance assessment with details on policy volume and revenue, new business and overall insurer activity. Provides insights about which insurer partners to focus on based on their likelihood to provide a timely response and competitive policy for your customers.

Premium Benchmarks

Powered by more than one million policies, the dashboard compares the current policy to policies with similar details to help you win new business or validate with current customers that you are competitive during policy renewals.



Data analytics make companies 5X 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.

Riskmap Dashboard Enhancements

Adds the ability to see current COVID-19 case counts by county, enabling your business to closely monitor and prepare for the impacts of COVID-19.

Have Questions?

Call 800.999.5368

Visit appliedsystems.com