Managing Your Agency

Applied Epic® for Salesforce®
is the leading sales and marketing application built for the insurance industry.

As agencies become more sophisticated in how they sell and market insurance, they require new technology designed specifically to manage prospecting, pipeline, and renewals. So while sales focuses on selling the business of insurance, servicing can keep customers happy and protected.

Applied Epic for Salesforce is the only Salesforce application that enables P&C and Benefits-focused complex sales organizations to enhance their lead and opportunity management while simultaneously maintaining back-office automation to more quickly generate greater business value. Key data objects are synchronized between the applications and data is instantly accessible to view on demand, eliminating redundant data entry and improving cross-sell and upsell opportunities.

Built 100% natively on the Salesforce platform, the application works across all Salesforce clouds, with enhanced capabilities specifically for Financial Services Cloud (FSC) for Insurance.

Enables your agency to

- Connect the world's most widely used management system with the #1 CRM in the world

- Empower P&C and Benefits sales and marketing teams with a single system to generate new pipeline and retain renewals

- Receive insights from Salesforce and set up alerts and automate workflows based on this data

- Customize workflows for both P&C and benefits business needs and access more than 5K apps in the AppExchange

Core Capabilities

P&C and Benefits Management

Manage all lines of business in a single, integrated system. Applied Epic for Salesforce seamlessly exchanges P&C and benefits data between systems so you can use the powerful automation and actionable insights across your entire portfolio. Benefits agents can also leverage Benefits-specific capabilities to manage benefits plan details and attributes, commission schedules and services plans natively in Salesforce.

Cloud choice

Built 100% natively on Salesforce, Applied Epic for Salesforce® is built to work across all Salesforce clouds, including Sales Cloud, Service Cloud, Financial Services Cloud (FSC) for Insurance, Marketing Cloud, and Community Cloud. Specific integrations have been built with Financial Services Cloud to integrate policy term lines and agency structure.

Purpose-built data model

Applied Epic for Salesforce goes beyond the traditional insurance data model, and has created a purpose-built data model that has account, policy and Applied Epic attachment components. The application data model also maps organizational structure by agency, branch, department, and profit center, and aligns employee roles and security rights established in Applied Epic with Salesforce.

Activity Management

Keep front-office and back-office staff on the same page with bi-directional activity data exchange. Activities can be managed at the work type and employee level, and can be initiated in either system, synced, and accessed by both sales and service reps so they can deliver a consistent message to prospects and customers.

Insurance Lead Management

Push a converted lead from Applied Epic for Salesforce into Applied Epic to establish account and contact details plus create an opportunity.

Reports & Dashboards

Gain full insight into how your sales and servicing teams are performing through detailed producer and manager dashboards. Utilize 50+ out-of-the-box insurance reports to quickly review the health of your book of business, upcoming renewals, and opportunities to determine how much new business you are bringing and keeping in your business.

#1 CRM system in the world

Source: IDC Worldwide, Semiannual Software Tracker, Oct 2019

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.

Call 800.999.5368
Visit appliedsystems.com

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