

# Epic Sales Automation



Increase visibility into your sales pipeline with Applied Epic®.

**Applied Epic is the world's #1 brokerage management system and it delivers powerful capabilities for you to better manage sales opportunities so you can make more informed decisions and quickly capitalize on new business opportunities.**

More than ever, a greater emphasis is being placed on brokerages to sell both efficiently and effectively. Epic Sales Automation is the industry's first fully integrated sales opportunity, pipeline, forecast and activity manager. It provides a single view of your prospects and customers within your core system, so you no longer need to invest in separate solutions to manage your sales pipeline.

## What Epic Sales Automation Offers Your Brokerage

- Role-based, intuitive dashboards that offer a visual representation of performance against individual sales goals and sales opportunities
- Greater visibility into your sales pipeline – both for prospective and current customers – to more closely forecast and track new business opportunities and renewals directly within the platform
- Ability for sales teams to manage their pipeline, forecast premium/revenue and follow the sale from lead to policyholder



**Companies that use sales automation achieve higher conversion rates of 53% and higher annual revenue growth rate of 3.1%.**

Source: Aberdeen Group

## Allows your brokerage to

- Execute a sales strategy with customizable best practice sales process management capabilities
- More closely forecast and track revenue opportunities
- See how your team is performing via role-based dashboards

Have Questions?

Call 866.899.5120

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