

# Applied Epic<sup>®</sup> is the world's most widely used agency management platform.



**Applied Epic is an all-in-one solution that delivers core capabilities for each person within the business to manage prospecting, CRM, market access, quoting, accounting, reporting, and policy and Benefits admin with ease.**

With Applied Epic, you no longer have to spend time and money on multiple systems. All roles, locations and lines of business, including P&C and Benefits business, can be managed in this one platform to give you a crystal-clear picture of your entire agency.

Our Applied Epic software is browser-native so your team is able to easily access data, minimize software management and more quickly realize the value of new capabilities.

Its open API architecture gives you the flexibility to integrate with both Applied and third-party applications to meet the ever-changing needs of your business.

Build your agency on a system that automates back office operations, keeps your front office sales team connected, and integrates with customer service and insurer connectivity technologies.

## Allows your agency to

- Reduce operating costs and gain greater business insights
- Increase employee productivity and satisfaction
- Build an agile technology strategy on an open and secure platform
- Foster better insurer relationships and save time servicing customers

*“On our first full year with Applied Epic, we had a fiscal year increase of 7% per employee, and we expect that efficiency to continue.”*

– Jim Bailey, President, Pritchard & Jerden



## Core Capabilities

### Integrated Benefits Management

Epic Benefits provides completely unique Benefits-specific screens to capture general plan information, rates, coverages, eligibility criteria, stop loss and TPA information. Handles commission rate tiers, including flat-fees per risk. Integrates with Applied Benefits Designer™ to provide access to custom form management and templates that beautifully present RFPs and plan summaries, including government-mandated summaries of Benefits and coverage.

### Process Management and Automation

Automates, adapts and reassigns the most frequently used workflows to ensure consistency across all users and locations through business process management capabilities and pre-built workflows with myEpic.

### Accounting

Integrated accounting built specifically for insurance makes your FP&A teams efficient and reporting easy.

### Policy Management

Real-time access to policy information at each stage of the lifecycle simplifies back-office administration so you can provide quick and accurate service.

### Sales Automation and Customer Relationship Management

Integrated sales automation makes your management system the only place you need to go to view, monitor, track and forecast new business opportunities and renewals. From there, it connects with world-class CRM technologies, like Salesforce, to give you a 360-degree view of customers.

### Document Management

Streamlines the management, organization and security of documents based on your agency's guidelines or your own customized process. Allows you to keep it simple or create deep folder hierarchies. Searches, creates reports, tracks history and/or versions by customer or vendor.



Five of the top 10 largest agencies utilize Applied Epic.

Source: Business Insurance

### Market Access and Quoting

Integrated Personal Lines and Commercial Lines quoting reduces redundant data entry and makes for more efficient quoting with insurers directly in your management system so you can make sure your customers get the best products at the right price – all with fewer clicks.

### Insurer Connectivity

Automated information exchange between you and your insurer partners delivers the latest policy-related documents via download directly into your management system.

### Reporting and Data Analytics

Displays graphical business insights from your existing management system data. Use it to target where you can boost employee productivity and focus on the most profitable customer and insurer relationships.

### Omnichannel Customer Service

Easily integrates with your customer self-service portal and mobile app so you can give customers the freedom to access their policy information when and how they like.

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### Have Questions?

Call 800.999.5368

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