

Applied Epic[®] is the world's most widely used brokerage management platform.



Applied Epic is an all-in-one solution that delivers core capabilities for each person within the business to manage prospecting, CRM, accounting, reporting, policy management and Benefits administration 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 brokerage.

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 brokerage 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 brokerage 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

“The beauty of Applied Epic is it centralizes operations. It gives you visibility on everything that’s going on in your brokerage so you can determine what’s going well, what’s not going so well and take precise action.”

– Noel Feghali, President and Co-Founder, Panda 7



Core Capabilities

P&C and Benefits Management

Shows both your P&C and Benefits businesses holistically, all in one place, so you never have to leave your system.

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.

Sales Automation

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 brokerage'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.

Insurer Connectivity

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



Five of the top 10 largest brokerages utilize Applied Epic.

Source: Business Insurance

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 online self-service quoting tool as well as your customer self-service portal and mobile app so you can give customers the freedom to obtain quotes and access their policy information anytime, anywhere.

Have Questions?

Call 866.899.5120

Visit appliedsystems.ca