



The Applied Difference



Why Partner with Applied?



Strong balance sheet and investor backing fueling investments



Significant progress in integrating our unique set of insurance technology assets into our core Applied Epic® experience – for P&C and Employee Benefits lines



Invested in the most valuable insurance technology and connectivity assets to support YOUR growth and profitability



Intensely focused on using data to create high-value reporting and insights for agents and insurers



Our team is an extension of yours – we aspire to be the BEST people and culture in insurance technology



55%

Total market share

7 of the 10

Largest agencies are standardized on Applied Epic*

**Business Insurance Top 100*



“To keep up with our expanding team and client base, we began adding new technology vendors and services that provided short-term relief to our growing pains, but ultimately hindered our staff’s productivity and our long-term growth. Applied Digital Agency will allow us to better implement Applied technology into each department of our agency, reducing the redundancies and operating costs that come with working across multiple platforms and vendors.”

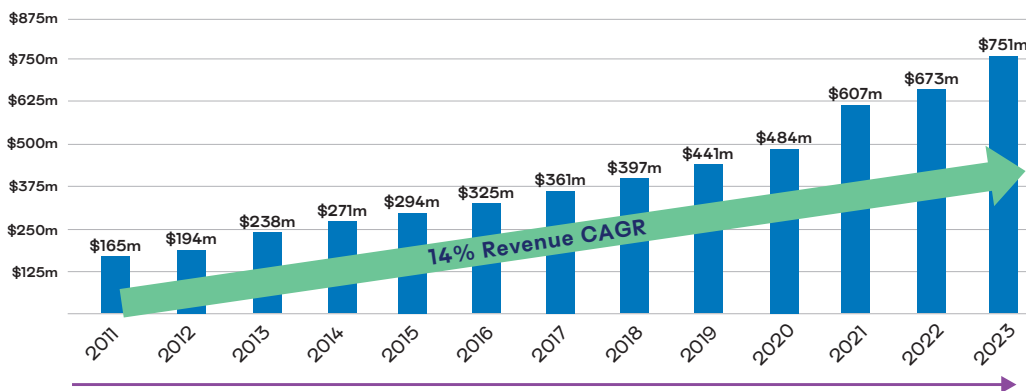
**Joshua Lavine, Chief Executive Officer
Capitol Benefits, LLC.**

Consistent Growth and R&D Investment

Since 2011, Applied has grown at an average annual rate of +14% and has been recognized routinely by Gartner as a growth leader in insurance software.

We are uniquely positioned with strong and long-standing ownership, comprised of CapitalG, Hellman & Friedman, Stone Point Capital and JMI Equity. These leaders have software backgrounds, deep insurance knowledge, and access to the best minds in global tech and cloud services.

Our innovation engine is fed at an industry-leading scale to create more value for you. We put above-average R&D dollars to work compared to other industry-leading software companies to ensure we stay a step ahead of what's next for our customers.



Consistent ownership creates long-term investment horizon

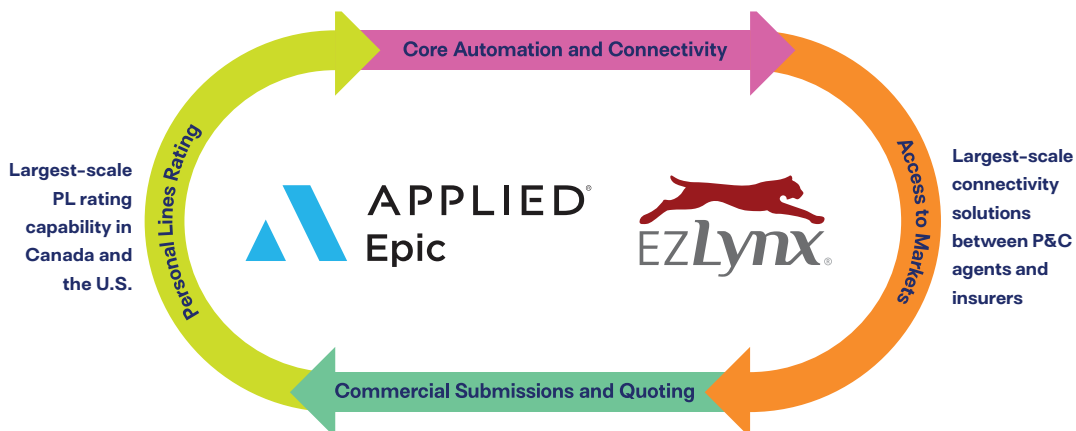


End-to-End Digital Connectivity

Digital connectivity is the lifeblood of the insurance industry. Across our portfolio, we have solutions that connect and automate every stage of the insurance lifecycle to create greater productivity, simplicity, intelligence and value.

The Digital Roundtrip of Insurance

Most widely used AMS solutions in the U.S., Canada, the UK and Ireland

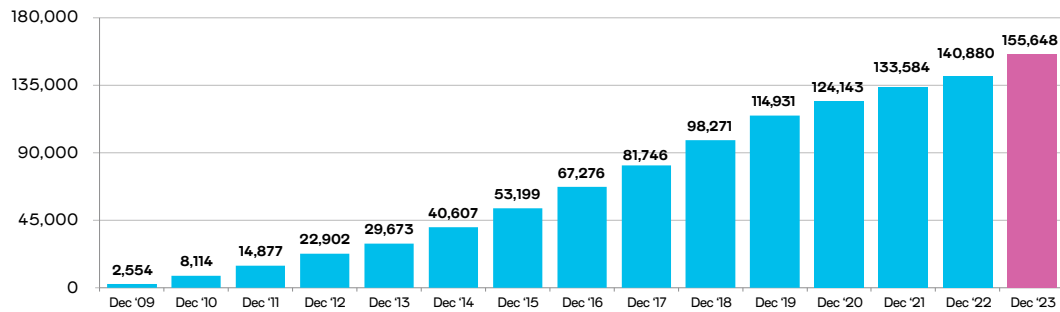


Leveraging AMS and connectivity solutions to drive CL productivity

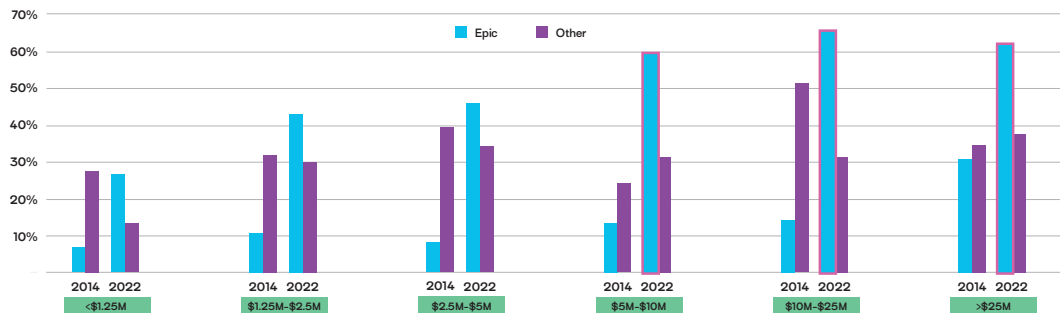
Supporting All Segments of the Market



Applied® is the leading global cloud software provider for independent insurance agencies and insurers. Recognized as a pioneer in insurance automation and the innovation leader, Applied is the world's largest provider of agency management systems. Applied Epic is the world's most widely used management system with exponential growth in users since it's launch.

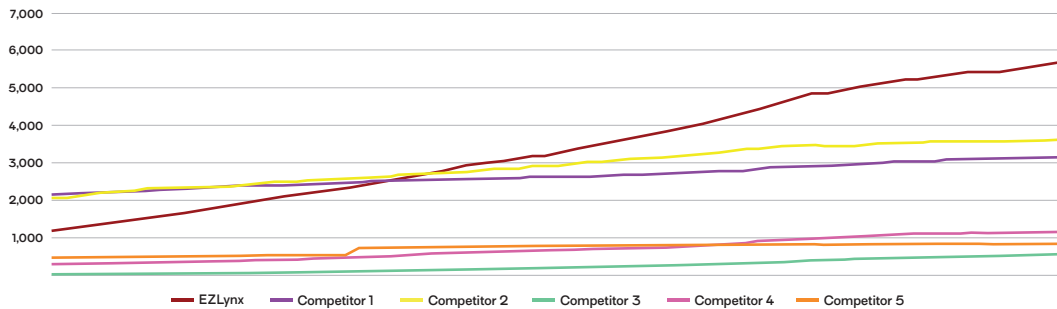


Distribution of Reagan Best Practices Agencies by Revenue Band





For over 20 years, EZLynx® has been devoted to solving insurance agents' most pressing problems by providing simple, approachable and straightforward all-in-one software. EZLynx isn't just a rating engine – it's also the fastest-growing agency management solution in its market segment.



Ivans® has evolved to be a technology brand for independent agents, insurers, MGAs, wholesalers, and technology partners alike, providing solutions that connect all players in the insurance industry to innovate and distribute products and services in more ways with greater ease. Ivans believes the insurance industry can operate with less friction and more efficiency.

600+

Insurers and MGAs communicate to their agents via Ivans

1M+

Transactions flow over the Ivans platform every day

38,000

Agencies connect to their insurer and MGA partners via Ivans

We've got solutions for each part of the insurance lifecycle.



Agency Management

A foundational management system is a single, integrated application that manages all aspects of an agency, including both P&C and Benefits lines of business, sales automation, market access and quoting, insurer connectivity, data analytics, customer service technology, marketing automation, and more. It allows you to maintain a clear picture of your entire agency across all roles, locations and lines of business. Management systems also leverage digital connectivity to make working with insurer partners easier and integrations with essential applications seamless.



Business Intelligence

Real-time data analysis puts the power of your management system in your hands. Track and analyze metrics that matter most to your business and make smarter data-driven business decisions to drive productivity, identify the most profitable business opportunities, strengthen market relationships, and provide insights on performance relative to peers.



Commercial Lines

An embedded commercial lines quoting application enables direct-to-consumer real-time quoting. By allowing the consumer to submit quoting data to multiple insurers and receive bindable premiums in real time, you can create a simpler, more connected commercial lines quoting experience that improves productivity and speed to market.



Digital Payments

A digital payments platform provides a safe, convenient way for insureds to pay their premiums online from any device and integrates seamlessly with your management system. Collecting and processing premiums should never be the most challenging part of what you do. Supercharge the collection process with a digital payments solution and reduce the effort, errors and liability associated with agency bill pay.



Insurer Connectivity

Digital connectivity technology seamlessly connects you with your insurer partners and eliminates the manual processes and paperwork slowing your staff down. Without ever leaving your core system, you can find the best products quickly and easily and exchange policy details. Digitally connecting to insurers and MGAs allows you to build more profitable insurer relationships and deliver faster, more complete service to policyholders.



Marketing Automation

Marketing automation software combines the power of targeted content with effective email campaigns to nurture customer and prospect relationships. It can help to ensure that marketing campaigns are hyper-targeted and hit a customer's inbox at the right time by setting triggers during sales workflows. Marketing automation software has reporting features that give you insights into campaign effectiveness and ensure you comply with marketing laws. By supercharging marketing efforts with marketing automation, you can experience higher renewal conversions, increased customer satisfaction, and an elevated advisor role.



Sales Automation

CRM and sales automation applications streamline your sales pipeline and help manage the complete customer lifecycle. They integrate with the management system to effectively manage sales and drive higher renewal rates by providing a singular view of prospects and customers. This allows sales staff to focus on selling and service staff to keep customers happy. CRM and sales automation applications give each person in the agency a complete view of clients and prospects, helping you grow your books of business and profits quickly.



Self Service

Self-service technology like online customer portals and mobile apps allow policyholders to choose how they interact with your business and manage their policies autonomously. Customers have the power to manage their accounts, including bill payments, making changes to policies, and sending policy documents. Because self-service technology syncs with the core system, you have transparency in customer interactions and eliminate administrative tasks.

Support & Adoption

From Yes to Success

Investing in world-class technology is just the first step in digitally transforming your business to drive success every day. Taking you from that moment of purchase, that “Yes” moment, to “Success” is where Applied’s approach to partnership sets us apart. We are laser-focused on delivering value for you.

97%

Customer Satisfaction

24/7

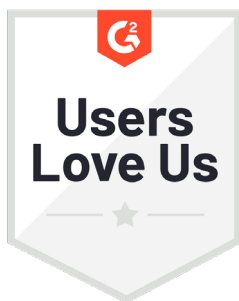
Live Customer Support

95%

Customer Retention

Customers Are Our #1 Priority

This commitment to customer success is evident in our industry and company recognition, including honors from notable trade publications, association innovation challenges, G2 and other Top 100 lists.



Leading the Industry

Applied is committed to delivering practical, innovative solutions to help you become a simpler, easier business partner to your clients. We are devoted to being innovative in growing our people and delivering even more value to the entire industry. And people are taking notice.



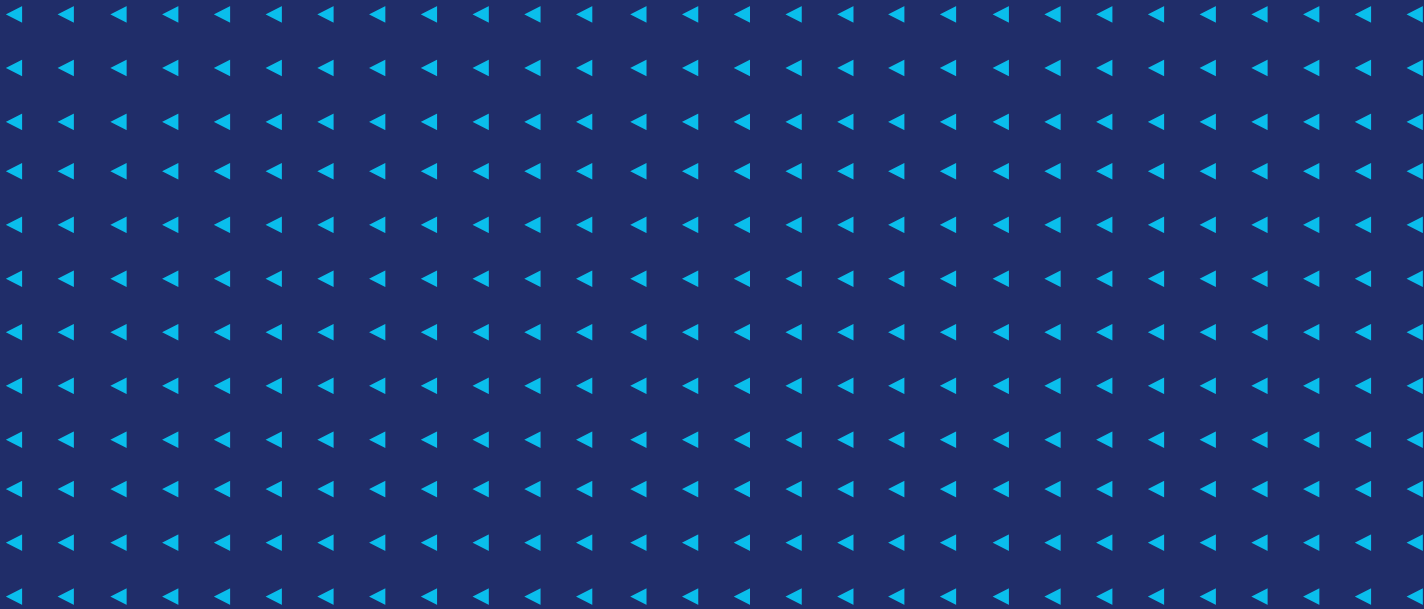
“The Applied portfolio not only aligns with where the market’s going, I also think the Applied portfolio is driving where the market is going.”

Bob Peters, Chief Operating Officer of Insurance Office of America



About Applied Systems

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. By automating the insurance lifecycle, Applied's people and products enable millions of people around the world to safeguard and protect what matters most.



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