



Empowering Brokers and Insurers to Thrive



Why Partner with Applied?



Strong balance sheet and investor backing fuelling investments



Significant progress in integrating our unique insurance technology into the core Applied Epic® experience, ensuring you can scale alongside evolving needs and industry trends



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 brokers and insurers



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

Supporting All Segments of the Market

Applied® is a global cloud software provider for independent insurance brokers and insurers. Recognized as a pioneer in insurance automation and an innovation leader, Applied is the world's largest provider of broker management systems.



“As the insurance ecosystem becomes more complex. We’re in a fortunate position where we have a great ownership group that realizes that for Applied to serve its market properly, we need to continually invest in our products, so Canadian brokers have more growth opportunities.”

*Steve Whitelaw, Senior Vice President and General Manager,
Applied Systems Canada*

Consistent Growth and R&D Investment



Since 2011, Applied has grown at an average annual rate of 11% 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.



STONE POINT CAPITAL

JMI
E Q U I T Y

CapitalG

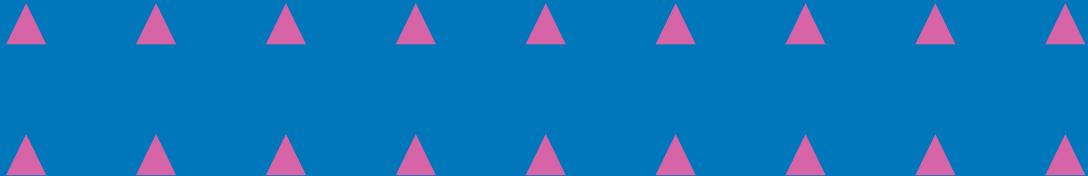
Our innovation engine is fed at an industry-leading scale to create more value for you. We invest more in research and development than many other top software companies to ensure we stay one step ahead of what's next for our customers. Over the past five years, we've invested over \$1 billion in acquiring great teams and products to make us stronger and deliver more value across the insurance lifecycle for our customers.

\$150M+

Total Product and Tech
Spend in 2024

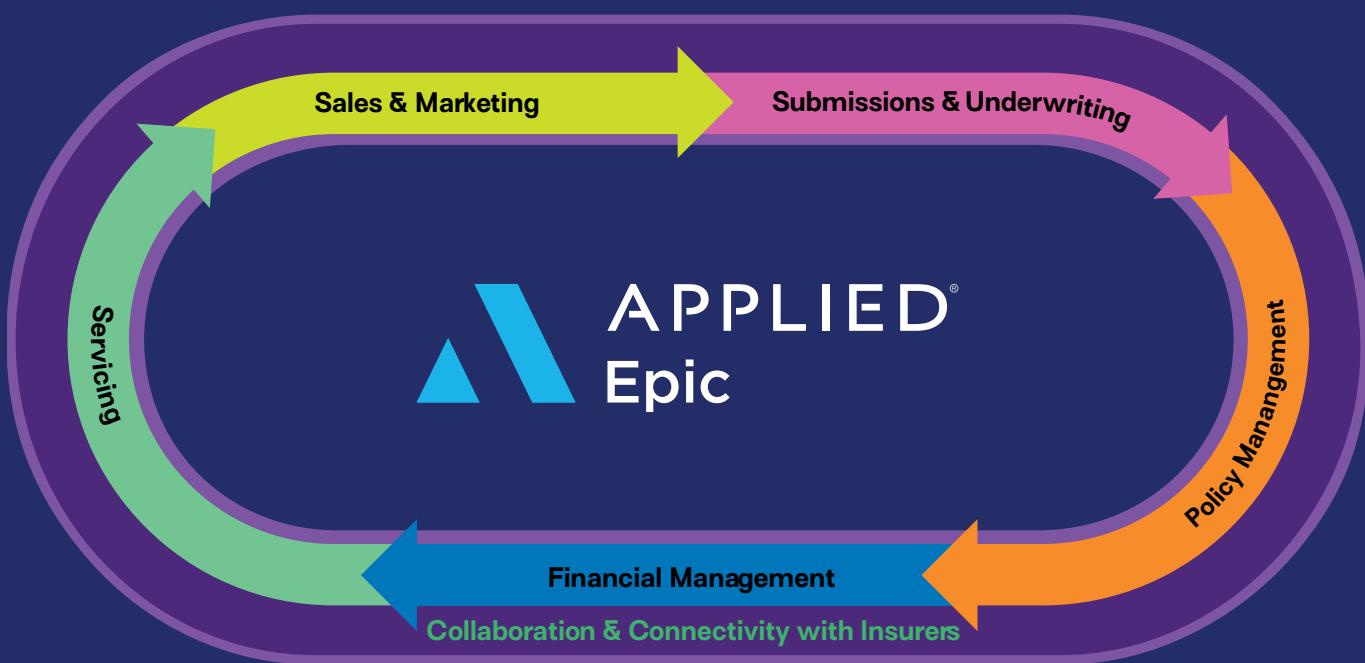
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Invested in M&A
2019-2024



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. Our strategy continually evolves by applying data and AI as horizontal capabilities, finding meaningful, practical ways to infuse data and AI into key policy and business workflows where they can drive the biggest impact, creating a tailored experience in Applied Epic, and prioritizing core innovation and ecosystem connectivity.



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



Broker Management

A foundational management system is a single, integrated application that manages all aspects of your brokerage, 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 brokerage 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 more efficient.



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 broker bill pay.



Insurer Connectivity

Digital connectivity technology seamlessly connects you with your insurer partners and eliminates the manual processes and paperwork that slow your staff down. Transform new business and renewal workflows with intelligent connected rating and submissions applications that enable 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 your 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 easily comply with government regulations. By supercharging your marketing efforts, 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 your management system to effectively manage sales and drive higher renewal rates by providing a singular view of prospects and customers. This allows sales teams to focus on selling and service teams to keep customers happy. CRM and sales automation applications give each person in the brokerage a complete view of clients and prospects, helping you grow your book of business and profits quickly.



Self-Service

Self-service technology, like online customer portals and mobile apps, allows 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 policy changes, and sending policy documents. Because self-service technology syncs with your core system, you have transparency in customer interactions and eliminate administrative tasks.

“Working with Applied for solutions to make it low touch or on anything that allows our current staffing situation to meet clients’ needs has helped us combat the current labour shortage in Canada.”

Caroline Sherk, Chief Operating Officer, Verge Insurance Group

Dedicated to Your Success



Our Canadian support team's extensive knowledge of the broker channel offers you exceptional experiences compared to offshore support. With over 400 employees in Canada, we provide unique insights and a more personalized approach to solving user and technical support issues while providing the best experience possible.

The results speak for themselves

- Phone hold times continue to be around one minute and will only improve with our upgraded callback capabilities.
- Chat hold times are around 22 seconds, and we constantly strive to reduce them.
- Support Customer Satisfaction scores remain strong at 9.7 out of 10, and we continually focus on maintaining that score or higher.

“What we’re all driving for at Applied is to be your indispensable partner. We’re constantly measuring ourselves and looking at how we can improve along the customer journey at every point. But ultimately, we measure ourselves by your success.”

Chris Borgmeyer, Senior Vice President of Customer Support, Applied Systems

About Applied Systems Canada

Applied Systems Canada is part of 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 broker management systems, serving customers throughout Canada, the United States, 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.

Call 866.899.5120
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