

## NEWS RELEASE

# Applied Announces New Innovation Across Its Digital Agency Portfolio

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Recent investments usher in the next generation of insurance with increased product connectivity, automated workflows, and modernized user experiences

Chicago, IL., Sept. 11, 2024 (GLOBE NEWSWIRE) -- Applied Systems® today announced innovative enhancements across its Digital Agency® portfolio. Announced at this year's annual Applied Net® conference, the latest advancements leverage data and automation in new ways to accelerate the digital roundtrip of insurance across the Applied product portfolio, further connecting critical P&C workflows throughout the policy lifecycle to make it easier for agents to effectively service and grow their books of business.

Innovation across the Applied Digital Agency portfolio includes:

### Business Intelligence

The latest innovations to Epic Dashboards since its July 2024 general release further democratize access to the mountain of data in Applied Epic®, transforming it into easy-to-understand graphs and charts for more roles across the agency to understand business productivity and performance trends.

- Custom Dashboards User Security: Admin users can easily modify or remove access to custom dashboards and ensure the right people have access to the right reports.
- Risk Maps: Staff can gain additional context as to where customers' risks are geographically located to help plan customer visits and inform marketing decisions like events.
- Embedded Account Links: Direct links from Epic Dashboards into specific areas of a client's account like Opportunities, Policies, and Activities help staff quickly take the next action based on what the data is telling them to do.

- In-Dashboard Data Explanations: The data source and analysis calculation is indicated for each dashboard to give users confidence in the integrity and accuracy of the data.

## Connected Commercial Lines

The latest enhancements to Applied commercial lines workflows improve connectivity across the Applied Epic ecosystem, eliminating manual, repetitive tasks, particularly as they relate to time-consuming renewals.

- Commercial Submissions Activities Sync: Submission activities from Indio® store as Activity Notes on an account in Applied Epic, preventing the need to check multiple systems and rekey submissions data.
- Streamlined Certificate Holder Management: During renewals, updated certificate holder information can be captured from insureds using Indio then automatically pushed to refresh lists and generate certificates in Applied CSR24®, reducing time and costs spent generating unnecessary certificates from outdated holder lists.
- Renewal Time-Spent Insights: New Indio reports provide insight into the number of days staff spend processing renewals, helping leaders identify and address bottlenecks in current workflows.

## Core Servicing Automation

Enhancements to core management system capabilities streamline repetitive, time-consuming data entry, documentation, and accounting tasks through innovative applications of AI and redesigned user experiences.

- AI-Powered Email Summaries: When attaching emails to Applied Epic, staff can leverage AI to summarize the contents of an email conversation into a complementary note on an Activity in Applied Epic.
- Redesigned Applied Mobile App: A refreshed interface and simplified navigation make it easier for on-the-go agents to quickly access key policy-related information and tasks within an account via Applied Mobile®.
- Complex Commission Structures: Multi-term producer commission schedules in Applied Epic allow for more than one commission agreement per policy term, ensuring producers get paid the right amount and on time and eliminating manual commission tracking and adjusting.
- Daily Balance Dashboards: Real-time balances and transaction data across top merchants make it easier for finance teams to track daily activities and funds through Applied Pay®.

"At Applied, we center our product investments on accelerating the Digital Roundtrip of Insurance, creating greater connectivity and automation at each stage of the policy lifecycle," said Anupam Gupta, chief product officer, Applied Systems. "Our goal continues to be to deliver innovative, yet practical capabilities that help agencies spend less time on repetitive tasks and data re-entry so they can spend more time interacting with their customers and growing their books of business."

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## 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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