

# Applied Mobile® is the first insurance broker mobile application to bring client, policy and sales information to mobile devices.

**Applied Mobile is a purpose-built mobile app that enables insurance broker staff to access and manage customer, prospect and overall business information anytime, anywhere via a smartphone or tablet.**

Applied Mobile provides staff away from the office with a direct link to information in your management system and synchronises information back to the system to ensure your staff always has access to the latest customer and prospect details.

Applied Mobile allows staff to view accounts, contact details and insurance policy information; add prospects; and create and manage activities. The application also has risk assessment tools that enable account executives to accurately sell more more lines of business.

**“ To increase our competitive advantage, we chose Applied Mobile to evolve our customer service offerings and embrace new ways of doing business by providing a broader choice of engagement channels, including mobile, to reach our customers and prospects at additional touchpoints. ”**

John Haber-Smith, Director, John Ansell & Partners



## Enables a broker to

- Conduct more business outside the office with on-demand access to a single, up-to-date view of customer and business information.
- Instantly access customer and prospect account details and policy information whilst away from the office.
- Access and manage new business opportunity information to encourage prospect follow-up and quicker sales close rates.
- Keep customer and prospect information current, synchronised and safe between the app and your management system to ensure all staff have access to the latest information.



# Core Capabilities

## On-demand access to information

Applied Mobile instantly connects your staff in the field to information in your management system via a mobile app. Available for smartphones and tablets, Applied Mobile provides convenient, on-demand access to critical broker resources and client and prospect insurance information to provide optimal customer service at all times.

## Risk analysis

Applied Mobile Risk Analysis tools enable your staff to gather the information required to accurately assess client risk to write the business successfully regardless of their industry focus. Once completed, a Risk Analysis generated by Applied Mobile can be saved within the application, emailed, printed or added as an attachment on an activity and synced back to an account in your management system.

## Real-time activity sync

Applied Mobile provides real-time synchronisation between the app and your management system to ensure current, accurate account information is available and protected. New activities are also pushed in real time to Applied Mobile, keeping staff informed while away from the office.

## Native mobile capabilities

Applied Mobile utilises tools already installed on tablets and smartphones, like GPS technology, to map accounts and schedule meetings. The app also connects you to communication channels to call, email or text message clients, prospects and colleagues.



**76% of Millennials believe having mobile service is very important**

Source: IDG Research Services

## Why Applied?

Applied Systems is the leading global provider of cloud-based software that powers the business of insurance.

Recognised as a pioneer in insurance automation and the innovation leader, Applied is the world's largest provider of broker management systems, serving customers throughout the United States, Canada, the Republic of Ireland, and the United Kingdom.

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