Applied Relay Leads Management

Effectively manage your leads with Applied Relay

Applied Relay, the product of choice for Ireland's general insurance brokers, developed functionality to effectively manage your leads for enhanced business growth.

Applied Relay's Leads solution allows users to capture cross-selling information for all lines of business, and the leads repository can be accessed by the lead creator and their manager to view all users leads. Within the motor quotation process, a Leads control can be added to the risk collection screens so that users can load the Leads solution when capturing client and motor risk information. It is also possible to load the Leads solution from the policy listed in the client portfolio.

Applied Relay Leads Management provides your business with:

- Access for all users to capture leads, filter and target leads.
- Ability to filter leads by product type, renewal dates and lead collected dates.
- Access for managers to monitor and assign leads.
- Ability to preview leads reports in a PDF or export to Excel.

Enables your business to

- Save time and expenses with an intuitive, effective way of generating sales leads
- Have an effective cross-selling system
- Filter, assign and export leads to Excel or PDF

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 agency and brokerage management systems, serving customers throughout the United States, Canada, the Republic of Ireland, and the United Kingdom.

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