

Managing Your Brokerage

# Applied TAM<sup>®</sup> is the industry's pioneering brokerage management system.

**Applied TAM provides insurance brokerages the ability to automate daily operational processes, effectively manage client policy information and connect with insurers and insureds.**

Through an automated and easy-to-navigate interface, Applied TAM offers your brokerage greater visibility into client information and day-to-day operations to reduce time spent on administrative tasks; decrease errors and omissions risk; provide a seamless employee onboarding and training experience; and better respond to client needs.

The application connects your brokerage with insurer partners so staff can gain greater access to markets and automate servicing as part of daily system workflows.

Applied TAM enables more independent insurance brokerages to succeed in today's competitive business environment than any other management system in the world.

**“ Before Applied TAM, I didn't know if we were doing the right things. Now I have my hands around the data and insights into the business. With Applied, I know I'm doing it right.”**

Wes McKenna, Principal, McKenna Agency, Inc.



## Enables your brokerage to

- Manage prospect, client, accounting and policy management workflows with fewer keystrokes.
- Increase visibility into your book of business and standardize data for consistent reporting and company-wide evaluation.
- Increase insurer connectivity to automate servicing requests and access markets.
- Customize invoices and statements to fit your business requirements.
- Simplify employee onboarding and training with standardized and automated workflows.



# Core Capabilities

## Business process management and automation

Applied TAM standardizes workflows via myTAM to automate daily business functions and lower operating expenses. myTAM enables you to manage renewals in advance with automated follow-up communication to customers. You also can lower E&O risk and ensure accurate reporting with prefilled fields throughout the system.

## Multichannel customer service

Applied TAM seamlessly integrates with Applied Mobile, Applied CSR24 and Applied MobileInsured to provide your staff and customers 24/7 access to insurance information.

## Insurer connectivity

More insurers interface with Applied TAM than any other management system on the market. CSIO eDocs and other policy-related information can be automatically downloaded into Applied TAM from insurers, reducing duplicate actions and improving customer servicing capabilities.

## Marketing campaign management

Your brokerage can develop targeted marketing campaigns in Applied TAM with built-in marketing plans that allow easy access to coverage information. Applied TAM's reporting capabilities enable your staff to identify where to focus marketing campaigns for account rounding and cross-sell and upsell opportunities.



**98% of independent brokerages leverage their management system for document management, sales automation, and reporting and accounting.**

Source: IDG Research Services

## Why Applied?

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.

Call 866.899.5120  
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