

Epic Quotes Commercial Lines



Delivering a seamless, fully integrated connected commercial lines experience directly within Applied Epic.

Applied Epic® is the world's #1 agency management system, and with the ability to quote commercial business directly within the platform, you can stop bouncing between systems and close renewal or new business faster.

Maintaining profitability while handling high-volume commercial policies can be a challenging task for brokers. Additionally, enhancing the efficiency of an expanding commercial book, evaluating new business and repositioning existing policies can take up a significant amount of time.

Epic Quotes Commercial Lines (EQCL) is a single entry, multi-insurer submission platform in Applied Epic that automates quote generation, streamlining workflows across all commercial package segments. Brokers enter a clients risk details once and are intuitively guided through a dynamic question set that delivers quotes for multiple carriers—all in one interface—to accelerate the overall quote-to-bind process. By streamlining servicing across new business and renewals, brokers experience improved visibility, greater operational efficiency, and a faster, more accurate insurance experience for clients—positioning brokers as modern, tech-enabled advisors.

With the ability to pre-fill policy data and quote multiple lines and locations within a single workflow, you can quote new and renewal business faster, improving productivity and profitability.

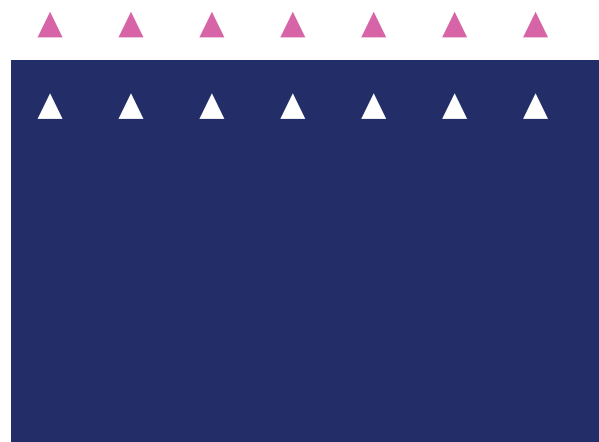
Allows your brokerage to

- Streamline operations with an integrated submission workflow embedded in the management system that removes data re-entry.
- Provide customers with the most competitive rates and the best coverage through more access to markets.
- Manage, service, quote, and indicate which policies are bound, without ever leaving the management system.



Core Capabilities

- **Automated Email Submissions:** Submit to all markets for small and mid-commercial packages, combined with real-time insurer responses, providing flexible, efficient options without duplicating effort.
- **Single View of Submissions:** Maintain overarching visibility into historical and active submissions, enabling easier tracking, faster follow-ups, and better decision-making.
- **Pre-fill Submissions with Applied Epic Policy Data:** Seamlessly transfer risk data from Account or Policy screens to the quoting screen, automatically populating policy and risk details from Applied Epic, eliminating the need to re-enter base question data.
- **Multi-Operation & Multi-Location Quoting:** Streamline the submission process by including up to three business operations and/or multiple locations within a single submission, saving time and reducing manual effort when quoting complex commercial risks.
- **Instant Rates:** Receive real-time small and mid-commercial quotes directly within Applied Epic. Rates and quote details are returned instantly, streamlining the submission process and enabling brokers to compare multiple insurer options without leaving their system.
- **Intelligent Smart Form Feature:** Automatically adapts questions to the specific risk quoted, eliminating irrelevant fields. This streamlines submissions, saves time, improves data quality, and ensures ease of use for all experience levels.
- **Market Access:** Access to all commercial package industry segments: Contractors, Retail, Business & Professional Services, Real Estate, Farming Services, Hospitality, Warehousing Servicing, Health Services, Wholesale Services, Manufacturing/Processing Services, Member Organization Services and Education Services associated with Canada's leading commercial insurers for both real-time and email submissions.
- **Policy Administration:** Efficiently manage the complete policy lifecycle by creating policies directly from Applied Epic Quotes, enabling seamless transitions from submissions to policy management and downstream services like branded proposals, certificates, and enterprise reporting via Data Lake.



Have Questions?

Call 866.899.5120

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