

FOR APPLIED EPIC AGENCIES

The Insurance Connect **feature** **guide.**

Every page shows the feature in the product, the four capabilities that make it work, and what your agency gets in return.

01	Master Agent	INTELLIGENCE
02	Restricted Agent	INTELLIGENCE
03	Live Agency Data	VISIBILITY
04	Late-Payment Follow-Up	AUTOMATION
05	Carrier Automation	AUTOMATION
06	Call Intelligence	VOICE

07	Call Sentiment Analysis	VOICE
08	Sales Scoreboard	VISIBILITY
09	Renewal Management	VISIBILITY
10	Producer & CSR Dashboard	VISIBILITY
11	Back-Office Automation	AUTOMATION

PROVEN IN A WORKING AGENCY

Already running at Satanoff Insurance Agency.

Insurance Connect is in daily use at Satanoff Insurance Agency today. It works alongside Applied Epic and serves more than 31,000 of the agency's clients.

31K+

CLIENTS SERVED

11

FEATURES IN THIS GUIDE

EpicWORKS ALONGSIDE
APPLIED EPIC

WHAT THE AGENCY RUNS ON INSURANCE CONNECT

INTELLIGENCE

Master Agent
Restricted Agent

VISIBILITY

Live Agency Data
Sales Scoreboard
Renewal Management
Producer & CSR
Dashboard

AUTOMATION

Late-Payment Follow-Up
Carrier Automation
Back-Office Automation

VOICE

Call Intelligence
Call Sentiment Analysis

INTELLIGENCE

Master Agent

Your AI business analyst.

01

THE PROBLEM

Simple business questions take days to answer.

Insurance Connect / Master Agent

ILLUSTRATIVE

RECENT QUESTIONS

October auto renewals

Claims opened this week

Top 10 commercial accounts

Carrier notice summary

Calls missed yesterday

Which personal auto policies renew in October, and who has not been contacted yet?

18 personal auto policies renew in October. 6 have no contact logged in the last 60 days:

CLIENT	CARRIER	RENEWS	PREMIUM	LAST CONTACT
Harper Family	Progressive	Oct 04	\$2,184	None
M. Alvarez	Travelers	Oct 09	\$1,462	74 days
Brookside Dental	Safeco	Oct 15	\$3,910	None
J. Whitaker	Progressive	Oct 22	\$1,238	68 days

Draft follow-up emails

Export to Excel

Show as chart

Ask about any client, policy, call or claim...

Ask

HOW IT WORKS

01 Ask in plain English

Ask about any client, policy, call or claim the way you would ask a colleague.

03 Reads your documents

Understands carrier PDFs, shared files and email threads you point it to.

02 Instant reports

Answers arrive as clear tables, charts or spreadsheets, ready to share.

04 Writes your emails

Drafts client and team email in your name. Nothing is sent until you approve it.

WHAT YOUR AGENCY GETS

Decisions based on facts, not guesses.

Minutes instead of days per question.

INTELLIGENCE

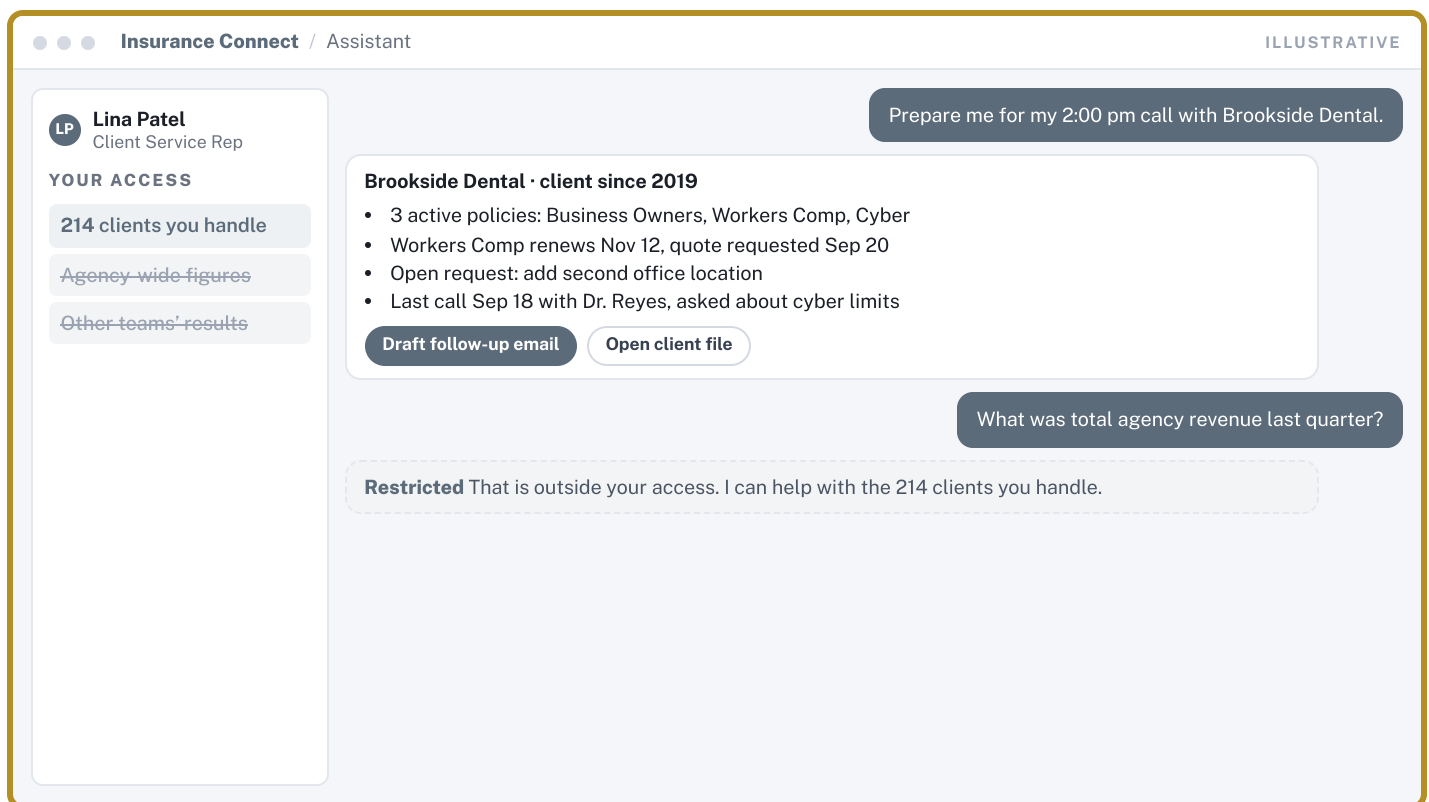
Restricted Agent

An AI assistant for every desk.

02

THE PROBLEM

Giving staff AI can expose the whole agency's data.



HOW IT WORKS

01 Focused on their clients

Works on the accounts a team member is handling right now.

02 Private by design

Agency-wide figures and other teams' results stay protected.

03 Knows your team

Recognizes each user and tailors its help to their role.

04 Everyday help

Prepares client summaries and follow-up emails in seconds.

WHAT YOUR AGENCY GETS

AI on every desk, without the risk.

Seconds to prepare for a client call.



Live Agency Data

Always up to date.

03

THE PROBLEM

Reports disagree because the data is out of date.



HOW IT WORKS

01 Automatic updates

Client and policy information refreshes every two hours, all day.

03 No slowdowns

Updates run in the background without slowing down your team.

02 Nothing missed

Every client is checked regularly, so recent activity always appears.

04 Always reliable

If anything is interrupted, it picks up exactly where it left off.

WHAT YOUR AGENCY GETS

One trusted version of the truth.

No exports and no reconciling numbers.

AUTOMATION

Late-Payment Follow-Up

Follow-up on autopilot.

04

THE PROBLEM

Carrier notices were not reaching the right client.

Insurance Connect / Late-Payment Follow-Up

ILLUSTRATIVE

23

NOTICES TODAY

21

MATCHED AUTOMATICALLY

2

NEED A PERSON

CARRIER NOTICES

NOTICE	MATCHED CLIENT	DUE	REMINDERS	STATUS
Progressive #88213	Harper Family	Oct 02	✓Email ✓Voicemail Final	On schedule
Travelers #4410	M. Alvarez	Oct 03	✓Email Voicemail Final	On schedule
Safeco #10957	Delgado Plumbing LLC from "J. Delgado"	Oct 05	Email Voicemail Final	Needs review
Progressive #88240	R. Kim	Oct 06	✓Email Voicemail Final	Logged to history
Nationwide #2291	Lakeview Cafe	Oct 07	✓Email ✓Voicemail Final	On schedule
Travelers #4475	Brookside Dental	Oct 09	✓Email Voicemail Final	Logged to history
Liberty Mutual #7730	S. Brennan two possible matches	Oct 10	Email Voicemail Final	Needs review

HOW IT WORKS

01 Finds the right client

Matches each notice to the right client, even when details differ.

02 Automatic reminders

Sends email and voicemail reminders on a set schedule.

03 Records every contact

Every reminder is saved to the client's history automatically.

04 Flags what needs you

Staff only step in for the few cases that need a person.

WHAT YOUR AGENCY GETS

Every at-risk client hears from you on time.

No research, writing or data entry per notice.

AUTOMATION

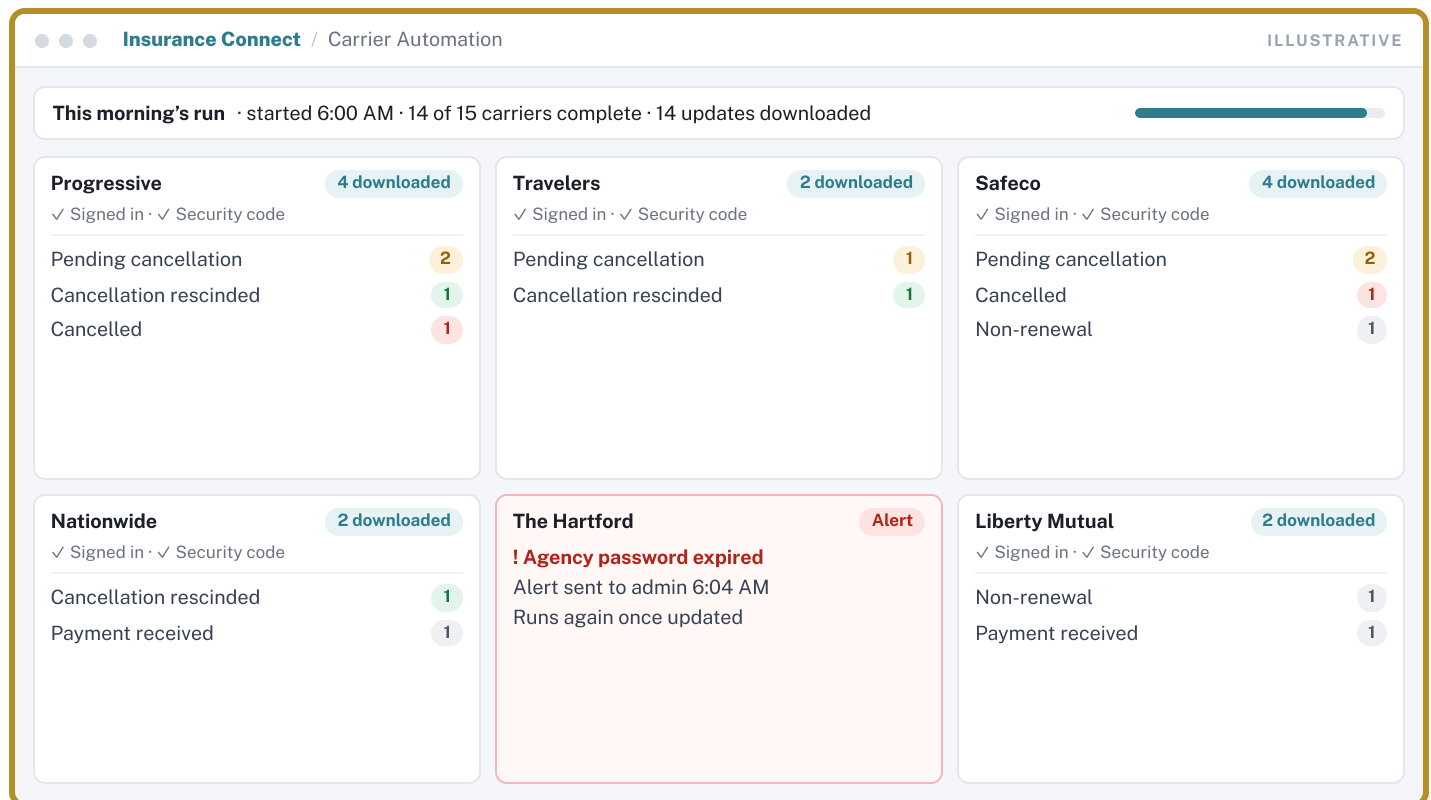
Carrier Automation

Carrier reports, delivered.

05

THE PROBLEM

Staff log into dozens of carrier websites every day.



HOW IT WORKS

01 Logs in for you

Signs in to each carrier website on a regular schedule.

02 Handles security codes

Completes the security check, so no one waits at a screen.

03 Collects the reports

Brings in cancellation and payment notices from every carrier.

04 Alerts on problems

Lets you know right away if a carrier could not be reached.

WHAT YOUR AGENCY GETS

Know about cancellations first thing each morning.

Hours of daily logins removed.



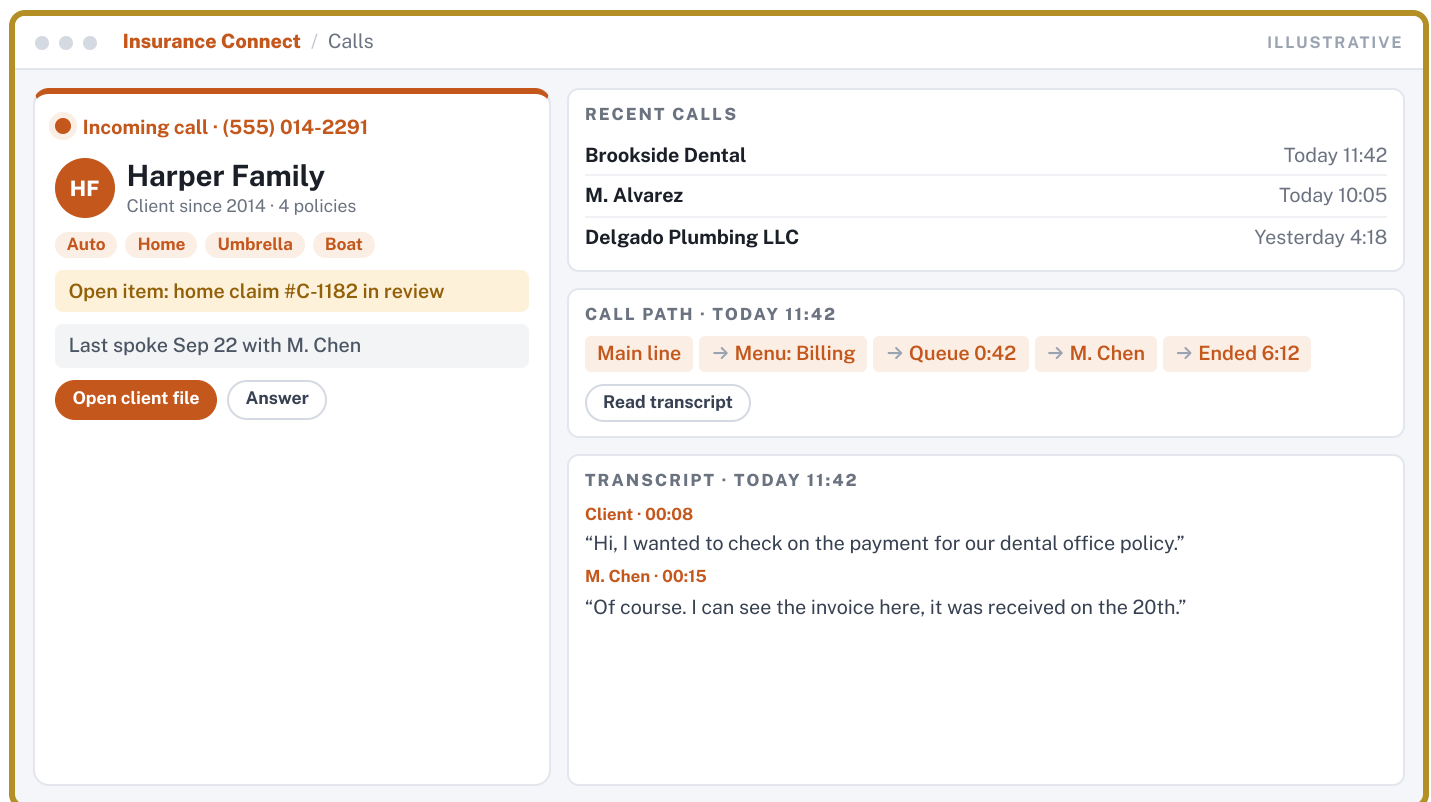
Call Intelligence

Smarter phone calls.

06

THE PROBLEM

1 in 5 “answered” calls never reached a person.



HOW IT WORKS

01 Know who is calling

The client's details appear on screen before you pick up.

03 Full call history

See exactly where each call went and how it ended.

02 Recent calls at a glance

See the clients you spoke with today and yesterday in one click.

04 Call transcripts

Read any recorded conversation when you need the details.

WHAT YOUR AGENCY GETS

Every caller is recognized.

One click from a ringing phone to the client file.



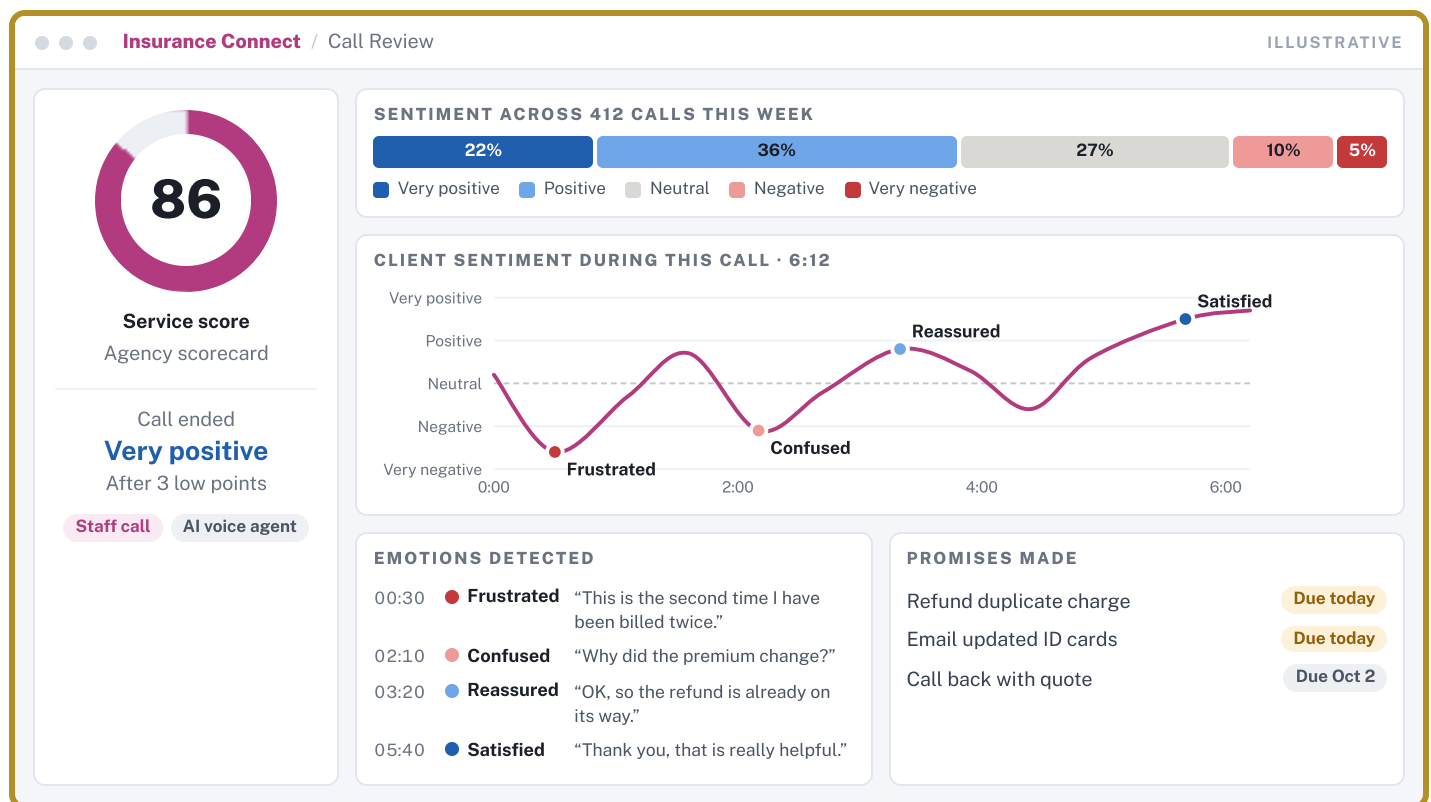
Call Sentiment Analysis

Every call, scored and understood.

07

THE PROBLEM

Managers can only listen to a handful of calls.



HOW IT WORKS

01 Your own scorecard

Define what a good call looks like, for the whole agency or just yourself.

02 Scored with proof

Every point is backed by the exact words spoken and who said them.

03 Promises tracked

Commitments made to clients, and their due dates, are pulled from each call.

04 Staff and AI calls

Review conversations handled by your team and by AI voice agents alike.

WHAT YOUR AGENCY GETS

Consistent service on every call.

Review hundreds of calls, not a handful.



VISIBILITY

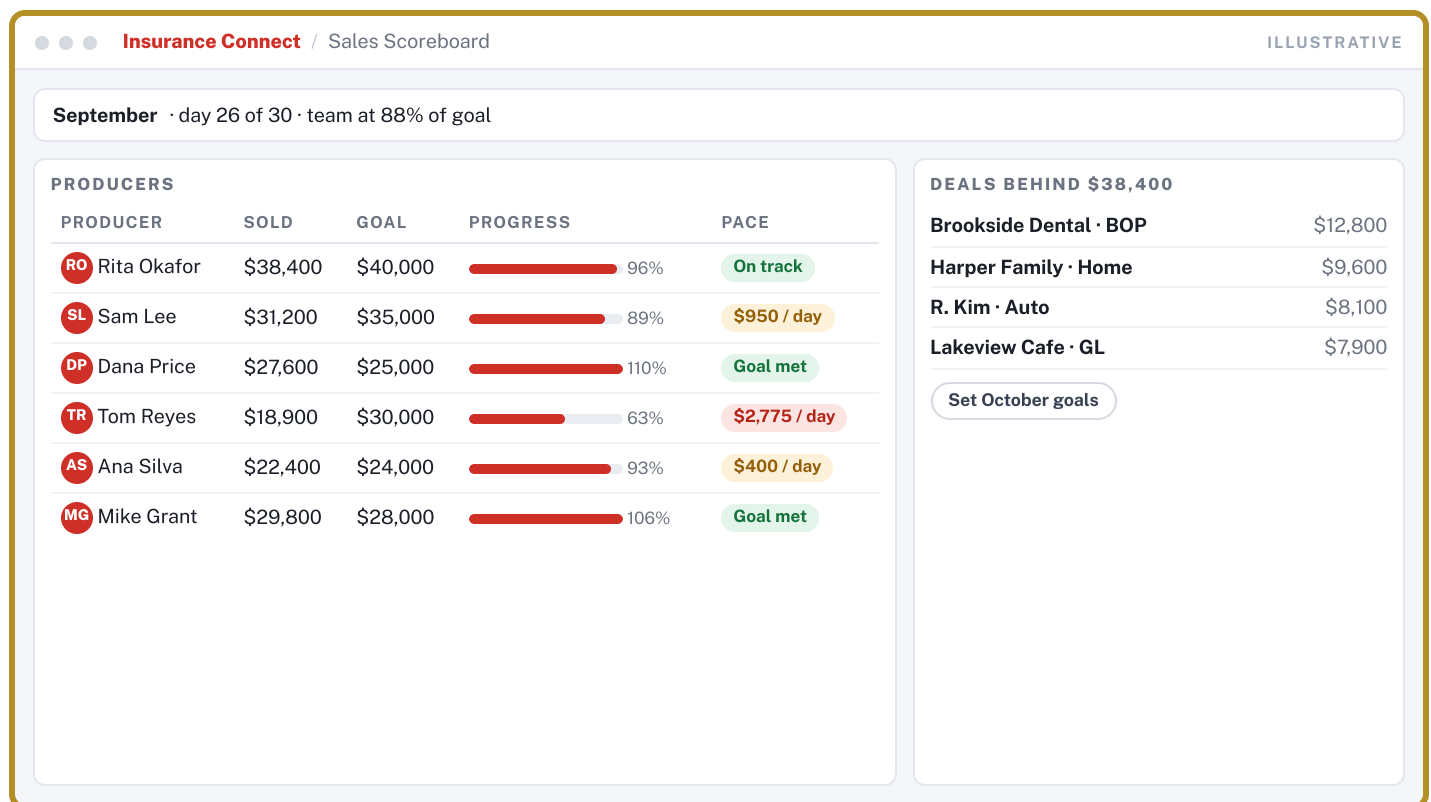
Sales Scoreboard

A sales board you can trust.

08

THE PROBLEM

Sales tracking lived in a spreadsheet no one trusted.



HOW IT WORKS

01 Goals vs results

See each producer's sales against their monthly goal.

03 See every deal

Open any number to see the deals behind it.

02 On-track indicator

Shows exactly what it takes each day to reach the goal.

04 Easy goal setting

Managers set monthly goals in the system, not a spreadsheet.

WHAT YOUR AGENCY GETS

Producers trust their numbers.

No spreadsheet to keep up to date.

VISIBILITY

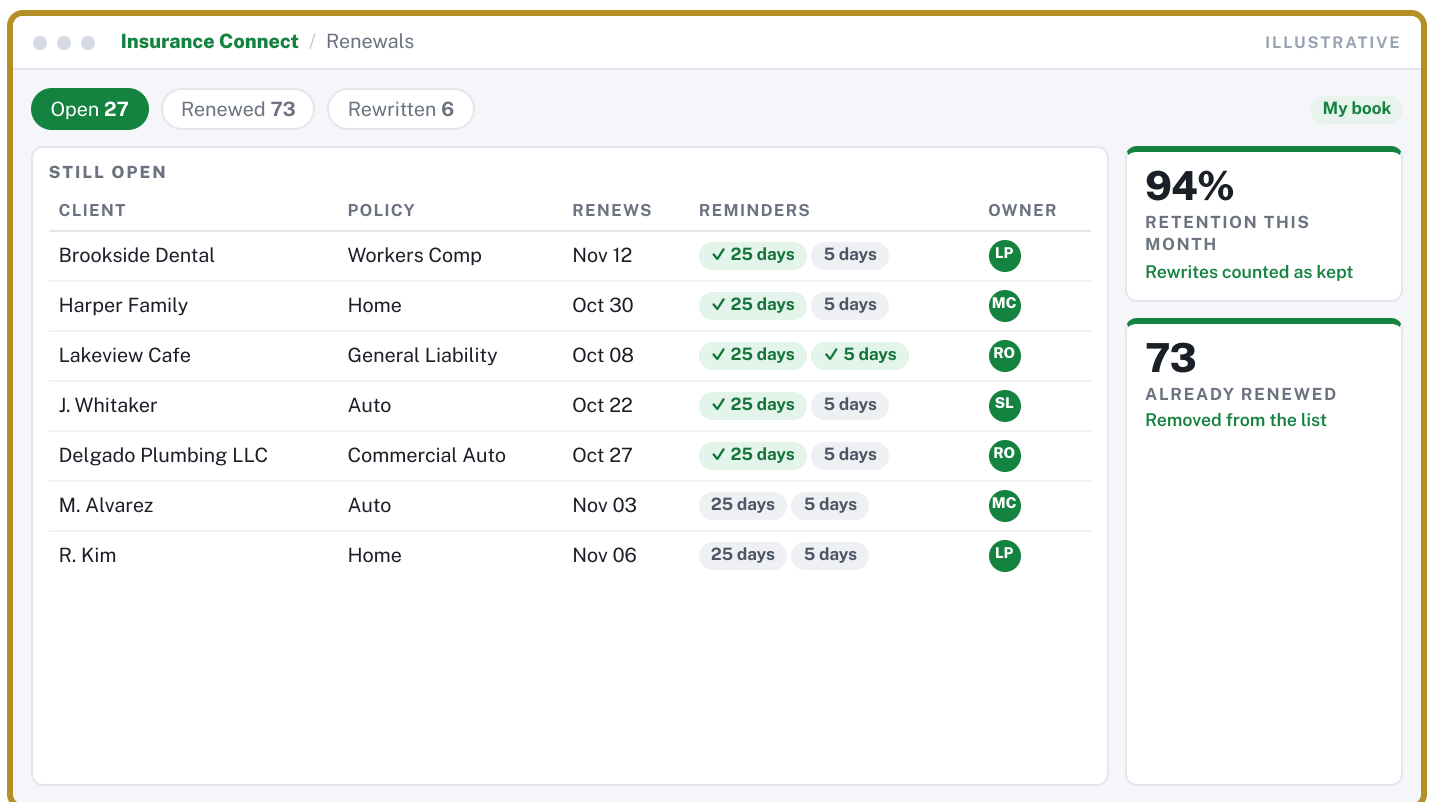
Renewal Management

Focus on what is still open.

09

THE PROBLEM

73% of listed policies had already renewed, yet staff checked every one.



HOW IT WORKS

01 Knows what renewed

Renewed policies drop off, so only open items remain.

02 Timely reminders

Each person is reminded 25 days and 5 days before a renewal.

03 Accurate retention

Rewritten policies count as kept business, not losses.

04 Personal view

Each team member sees their own book of business.

WHAT YOUR AGENCY GETS

Open renewals get attention early.

73% less busywork on the renewal list.



VISIBILITY

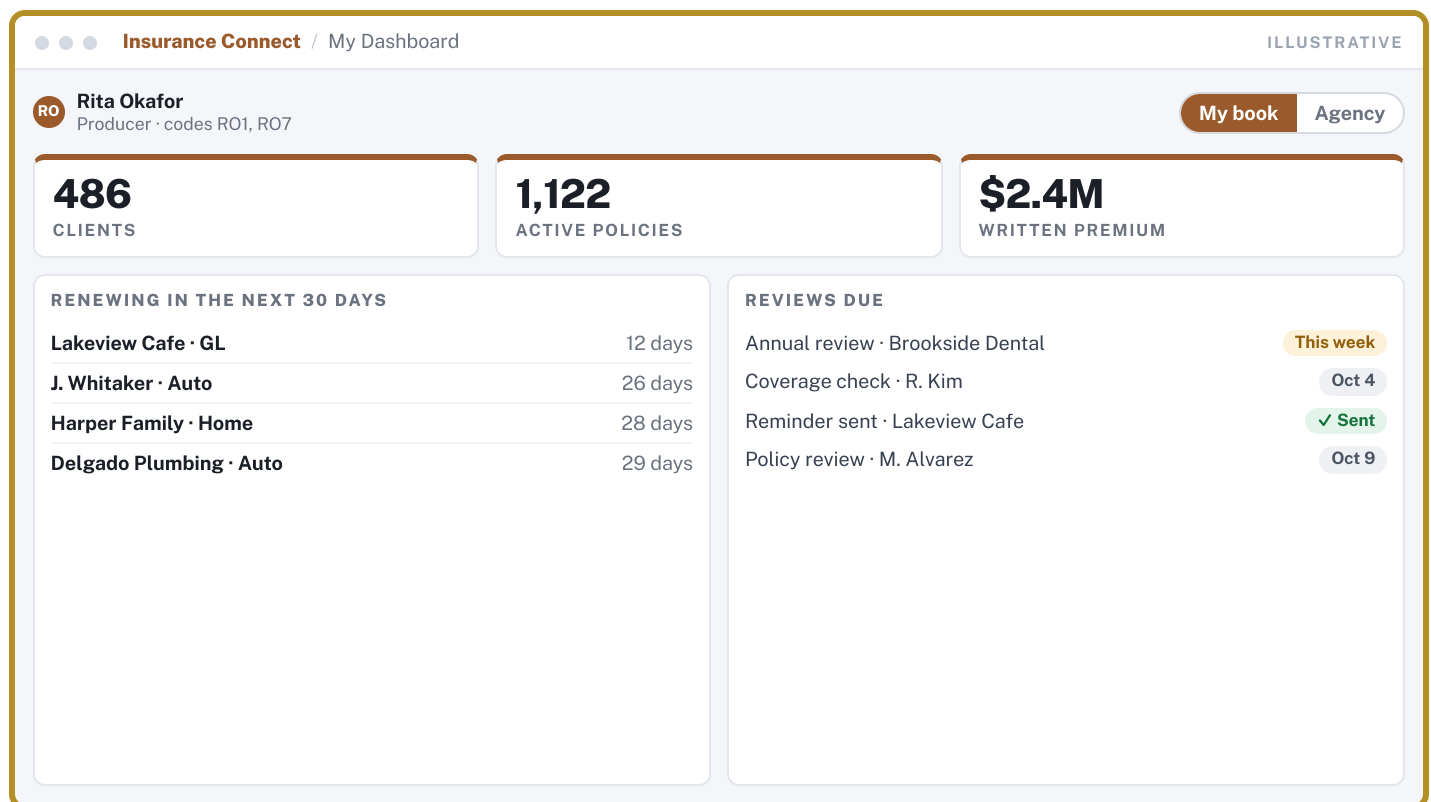
Producer & CSR Dashboard

10

Your book, at a glance.

THE PROBLEM

Staff see agency numbers, not their own work.



HOW IT WORKS

01 My book of business

Clients, active policies and premium for the accounts each person handles.

02 Renewals coming up

Policies expiring in the next 30 days, with reminders and reviews.

03 Matched to each person

Recognizes every producer and CSR, even across several codes.

04 Agency view for leaders

Owners and managers switch between the agency and their own book.

WHAT YOUR AGENCY GETS

Everyone owns their numbers.

No report needed to see your own work.

AUTOMATION

Back-Office Automation

11

The busywork, handled.

THE PROBLEM

Back-office tasks eat hours of skilled staff time.

Insurance Connect / Shared Inbox
ILLUSTRATIVE

service@inbox · 42 emails today · every one has an owner

NEW	IN PROGRESS	DONE
Progressive Cancellation notice #88240 PDF read · 2 pages	Brookside Dental Add second office location LP Lina Patel	Harper Family Proof of insurance request ✓ Logged to Applied Epic
M. Alvarez Updated vehicle VIN Assign to M. Chen	Safeco Endorsement confirmation SL Sam Lee	The Hartford Policy documents ✓ Note added in Epic
Travelers Billing statement PDF read · 4 pages	R. Kim Question about deductible MC M. Chen	Lakeview Cafe Certificate of insurance ✓ Activity logged

Daily digest · 7:00 AM to each person's inbox · 5 reminders, 3 renewals, 2 follow-ups

HOW IT WORKS

01 Shared inbox board

Every email to a shared inbox is captured on one board and given an owner.

03 Agency system kept current

Activities and notes are recorded in Applied Epic without retyping.

02 Documents read for you

Scanned PDFs and carrier documents become searchable text automatically.

04 Scheduled summaries

Reminder lists and daily digests arrive in each person's inbox.

WHAT YOUR AGENCY GETS

Skilled staff focus on clients.

Sorting and retyping removed from the day.



See it live at the booth.

Bring one question from your agency. A 20-minute demo on a real Applied Epic agency.

Book a demo insuranceconnect.ai/book-demo