Technuf
Insurance
Connect

FOR APPLIED EPIC AGENCIES

Insurance Connect Handbook

The operations layer your agency runs on. Nine features that answer questions, handle the follow-ups and keep your numbers accurate, so your team spends the day on clients, not paperwork.

AT A GLANCE

Nine features. One agency workflow.

Insurance Connect works alongside your agency system, phones and email. Each feature solves a problem your team deals with every day.

THE NINE FEATURES

01
Master Agent
Ask any question about your agency in plain English and get a clear answer, report or email in minutes.

02
Restricted Agent
A safe AI assistant for every team member, focused only on the clients they work with.

03
Live Agency Data
Your agency information refreshed every two hours, so every report and answer uses the latest data.

04
Late-Payment Follow-Up
Carrier notices turn into timely client reminders that are sent and recorded automatically.

05
Carrier Automation
Reports from 30+ carrier websites collected overnight and ready before your team arrives.

06
Call Intelligence
Know who is calling before you answer, and see exactly what happened on every call.

07
Sales Scoreboard
A live view of every producer's progress toward their monthly goal.

08
Renewal Management
A renewal list that knows what is already done, so your team only works what needs attention.

09
Back-Office Automation
Email, documents and record-keeping handled in the background, so staff focus on clients.

FEATURE 01 · MASTER AGENT

Your AI business analyst.

Leaders and operations teams ask questions the way they would ask a colleague, and get answers backed by the agency's own records.

THE CHALLENGE

Simple business questions take days to answer.

Every new question means a report request, a wait, and often a follow-up request after that.

KEY FEATURES

01

Ask in plain English

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

02

Instant reports

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

03

Reads your documents

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

04

Writes your emails

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

WHAT YOU GET

Decisions based on facts, not guesses.

Leaders get answers from the agency's own records the same day they ask.

Minutes instead of days per question.

No report requests, no waiting and no back-and-forth to get a number.

FEATURE 02 · RESTRICTED AGENT

An AI assistant for every desk.

Every team member gets an AI assistant for their daily work, with protection built in so agency-wide information stays with leadership.

THE CHALLENGE

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

So most agencies either keep AI from their teams or accept the risk.

KEY FEATURES

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 YOU GET

AI on every desk, without the risk.

Every team member gets help while agency information stays protected.

Seconds to prepare for a client call.

Client summaries and follow-up emails are drafted for them.

FEATURE 03 · LIVE AGENCY DATA

Always up to date.

Every report, dashboard and AI answer reads the same current information, so your team works from one version of the truth.

THE CHALLENGE

Reports disagree because the data is out of date.

Recent client activity was often missing, so no one knew which number to trust.

KEY FEATURES

01

Automatic updates

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

02

Nothing missed

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

03

No slowdowns

Updates run in the background without slowing down your team.

04

Always reliable

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

WHAT YOU GET

One trusted version of the truth.

Every report, dashboard and answer uses the same current information.

No exports and no reconciling numbers.

Information is never more than two hours old, with no one updating it by hand.

FEATURE 04 · LATE-PAYMENT FOLLOW-UP

Follow-up on autopilot.

Late-payment and cancellation notices become scheduled client reminders, so no customer slips through the cracks.

THE CHALLENGE

Carrier notices were not reaching the right client.

Staff had to research, write and record every reminder by hand.

KEY FEATURES

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 YOU GET

Every at-risk client hears from you on time.

Timely reminders protect retention and keep every contact on record.

No research, writing or data entry per notice.

Reminders are sent and recorded without anyone typing them.

FEATURE 05 · CARRIER AUTOMATION

Carrier reports, delivered.

Carrier reports are collected automatically overnight, so your team starts the day with the information already in hand.

THE CHALLENGE

Staff log into dozens of carrier websites every day.

Security codes and slow portals turn a simple download into an hour of work.

KEY FEATURES

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 YOU GET

Know about cancellations first thing each morning.

Carrier updates are in hand before the team starts the day.

Hours of daily logins removed.

No one signs into 30+ carrier websites or waits for security codes.

FEATURE 06 · CALL INTELLIGENCE

Smarter phone calls.

Your phone system connects to your client records, so every call starts informed and no missed call goes unnoticed.

THE CHALLENGE

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

Callers hung up at the phone menu, and the reports counted them as answered.

KEY FEATURES

01

Know who is calling

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

02

Recent calls at a glance

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

03

Full call history

See exactly where each call went and how it ended.

04

Call transcripts

Read any recorded conversation when you need the details.

WHAT YOU GET

Every caller is recognized.

A better client experience, and no missed call goes unnoticed.

One click from a ringing phone to the client file.

No searching for details while the client is on the line.

FEATURE 07 · SALES SCOREBOARD

A sales board you can trust.

A live scoreboard replaces the hand-kept sales spreadsheet, so producers and managers see the same accurate numbers.

THE CHALLENGE

Sales tracking lived in a spreadsheet no one trusted.

One producer appeared at 1.5% of goal after selling $85,925 in new business.

KEY FEATURES

01

Goals vs results

See each producer's sales against their monthly goal.

02

On-track indicator

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

03

See every deal

Open any number to see the deals behind it.

04

Easy goal setting

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

WHAT YOU GET

Producers trust their numbers.

Managers coach from accurate results instead of debating the spreadsheet.

No spreadsheet to keep up to date.

Goals and results stay current on their own, all month long.

FEATURE 08 · RENEWAL MANAGEMENT

Focus on what is still open.

Your team sees only the renewals that still need work, with reminders well before each date.

THE CHALLENGE

Most of the renewal list was already done.

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

KEY FEATURES

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 YOU GET

Open renewals get attention early.

Clients hear from you well before their renewal date, protecting retention.

73% less busywork on the renewal list.

Staff stop checking renewals that are already done.

FEATURE 09 · BACK-OFFICE AUTOMATION

The busywork, handled.

Routine back-office work happens in the background, so skilled staff spend their day on clients instead of admin.

THE CHALLENGE

Back-office tasks eat hours of skilled staff time.

Sorting email, reading documents and updating the agency system are all done by hand.

KEY FEATURES

01

Shared inbox board

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

02

Documents read for you

Scanned PDFs and carrier documents become searchable text automatically.

03

Agency system kept current

Activities and notes are recorded in Applied Epic without retyping.

04

Scheduled summaries

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

WHAT YOU GET

Skilled staff focus on clients.

Less time on admin means more time for service and new business.

Sorting and retyping removed from the day.

Email, documents and records move without anyone handling them by hand.

THE VALUE

What changes for your team.

The same platform, seen from every seat in the agency.

TEAM	BEFORE	AFTER
Service team	Searching for client details, writing reminders by hand	Starting every call with the client file open
Producers	Updating a sales spreadsheet	Seeing progress to goal any time
Account managers	Checking renewals that are already done	Calling only the renewals that need them
Operations	Logging into carrier websites, waiting on reports	Getting answers the same morning
Back office	Sorting email and retyping into the agency system	Records and documents handled automatically
Owners	Numbers that disagree	One trusted view of the agency

BUILT FOR TRUST

Right access
Each role sees only what it should

You approve
No client email without review

Data protected
Sensitive details stay private

Safe testing
Never contacts real clients

Stays fast
Your team is never slowed down

Results measured at a single agency of about 34,000 clients during 2026.

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SEE IT LIVE

Bring one question from your agency. We'll answer it at the booth.

A 20-minute demo on what matters most to your team: renewals, follow-ups, calls or sales.

Book a demo

Stop by our booth to see Insurance Connect running on a real Applied Epic agency.