

Applied Marketing Automation™ is an insurance marketing automation application.



Applied Marketing Automation is the industry's first natively integrated marketing automation application that allows you to quickly build and track marketing email campaigns so you can deliver relevant, timely P&C and Benefits content to your clients and prospects.

The application directly integrates with Applied Epic® so you can manage campaigns, contacts and marketing subscriptions without ever leaving your core system.

Our robust library of industry-specific curated content lets you quickly send one-off communications or set up a more complex, recurring automated marketing campaign that nurtures a select audience. You can also easily add your own content to the library for a mix of personal and native content.

Embedded reporting shows you the messages and content your audience is engaging with the most so you can adjust your campaign for maximum effectiveness.

Supercharge your marketing efforts for more targeted prospecting, higher renewal conversions and an elevated advisory role.

Allows your brokerage to

- Tap into a robust library of P&C and Benefits-specific content that is designed with you in mind and kept up to date
- Manage campaigns, contacts and marketing subscriptions via an integrated platform
- Gain insight into marketing campaign effectiveness
- Ensure compliance with email marketing laws and other regulatory restrictions

“With Applied Marketing Automation, we spend more time on campaign strategy and less time on content creation, which is value-added.”

– Jean Philippe Martineau, President, Groupe Ostiguy & Gendron Assurance



Core Capabilities

Content Library

Provides access to 1,000s of articles, infographics, toolkits, checklists and more content that's P&C and Benefits-specific. New content is frequently added and kept up to date by a dedicated editorial team, ensuring your communications are relevant and timely.

Contact and List Management

Allows you to create and manage hyper-targeted email campaigns using contact information within Applied Epic. Easily manage recipient subscription preferences too. That way, you won't annoy customers by over communicating, and will have peace of mind knowing you're in compliance with email marketing laws.

Campaign Management

Lets you send one-off relevant content to a single customer or set up and schedule a more complex, recurring automated marketing campaign to a select audience. Also allows you to develop your own recurring newsletter campaigns or send campaigns our team has created to deliver timely information to clients and prospects on specific topics of interest.

Reporting and Analytics

Embedded reporting shows you which messages and content your audience is engaging with the most. Easily adapt campaigns to make sure you're reaching the right audience with the right message.



88% of users are more likely to respond favorably if the email is personalized.

Source: Dynamic Yield

Have Questions?

Call 866.899.5120

Visit appliedsystems.ca