HubSpot + Applied Epic

Connect Your CRM & AMS for Seamless Insurance Operations

What is Applied Epic?

Applied Epic is the most widely used Agency Management System (AMS) for insurance firms. It manages back-office operations across policies, claims, commissions, accounting, and compliance workflows. Firms rely on Epic to manage renewals, process claims, and maintain financial and operational data for their book of business.

Why integrate with HubSpot?

Access a unified client view across CRM and AMS	Automate renewals, lead routing, and service tasks	Eliminate duplicate data entry between systems	Allow producers and brokers to work without Epic licenses

What You'll Need to Integrate

1. Entity & Object Mapping

Map Epic Entities to HubSpot Objects:

Companies
- Epic Clients → HubSpot Companies (not Contacts)
- Epic Companies can map directly

Contacts
One-to-one sync between Epic & HubSpot Contacts.

Deals/Opportunities
- Epic Opportunities ↔ HubSpot Deals

If HubSpot is the CRM of record, link Deals to Policies (closed-won). Quoting typically happens in Epic.

Policies & Lines
Represent Policies as HubSpot custom objects tied to Deals (closed-won) or Companies. Epic Lines can be nested custom objects if needed.

Other Objects
- **Claims → Pipelines** or custom objects
- **Commissions → Properties** or custom objects
- **Producers → HubSpot Owners** or Teams

2. Field Normalization

Standardize key Epic fields (e.g., LOB, Expiration Date, Status). Transform picklist IDs before syncing to ensure consistent data and reliable workflows.

3. System of Record

HubSpot should own prospect and pre-sale data. After conversion, Epic becomes the source of truth for client records, since it holds detailed policy info.

4. Access & Permissions

Control visibility and access through HubSpot teams:
- Scope views by role (CSR, producer, broker)
- Mask commissions and PII when required

5. Sync Logic

Define:
- **Cadence**: Real-time, scheduled, or triggered
- **Volume**: Full sync vs. delta-based
- **Direction**: One-way, bidirectional, or conditional
- **Error Handling**: Alerts, retries, and fallbacks

Integration Approaches

Approach	1 API Integration	2 BigQuery Sync	3 iPaas Platforms	4 Custom Architecture
Best For	Mid-market teams needing near real-time sync.	Enterprise firms needing full data access and reporting.	Fast deployment with low-code setup.	Large, segmented firms with strict compliance.
How it Works	Middleware polls Epic's REST API, transforms data, and syncs to HubSpot.	BigQuery add-on creates Epic database replica. Middleware transforms + loads data into CRM.	Uses tools like Workato or Boomi to orchestrate syncs and workflows between Epic and HubSpot.	Combines APIs, BigQuery, and custom middleware for scoped access.
Integration Factors	Polling cadence, token refresh logic, rate limits, logging, and error handling	Supports complex joins, full dataset control, and scheduled /delta syncs.	Easy setup, but limited flexibility for nested or high-volume data.	Impersonation, field-level security, and full audit trails. Overlaps API integration.
Use Cases	Sync contacts, route leads, auto-task on policy updates.	Dashboards, lapse segmentation, broker performance reports.	Renewal workflows, ticket creation, lead routing (ZIP or carrier).	Broker dashboards, restricted data views, claims-based scores.

What You Can Do Post-Integration

GTM Enablement
- Auto-task producers for renewals 90 days out
- Trigger cross-sell alerts for under-insured clients
- Segment leads: policy type, region, and product line

Client Visibility
- Provide 1099 brokers a live dashboard w/o Epic access
- Route leads or referrals via form logic tied to Epic fields
- Score accounts based on claims or inactivity

Reporting
- Track closed-won policies by LOB and rep
- Monitor NPS and support volume by client segment
- Attribute marketing influence to policies sold

Security & Compliance

We design integrations to meet:
- **GLBA, SOC 2, and FINRA** standards
- **Field-level filtering** to avoid syncing PII
- **Role-based HubSpot views** (Producers vs. CSRs)

- **Secure credential storage** with rotating secrets
- **OAuth token** lifecycle management
- **Full audit trail logs** (stored in external logging platforms)

CONTACT US

We've helped firms like Acrisure launch scalable, compliant HubSpot + Applied Epic integrations. Whether you're starting small or rolling out across teams and regions, we'll help you get it right.

Let's scope the right fit for your firm.

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