

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 handles back-office operations across policies, claims, commissions, accounting, and compliance workflows. Firms rely on Epic to manage policy renewals, process claims, and handle all financial and operational data tied to their book of business.

Why integrate with HubSpot?

HubSpot provides CRM, marketing, sales, and service tools built for GTM execution. When integrated with Epic, it enables GTM teams to:

Access a unified
client view
across systems

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:

- **Clients** → Contacts
- **Accounts** → Companies
- **Opportunities** → Deals
- **Policies/Coverage** → Custom 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) to ensure consistent data, support integration logic, and enable reliable workflows in HubSpot.

3. System of Record

Define which platform owns each field (e.g., Policy status = Epic).

4. Access & Permissions

Scope views and roles using HubSpot teams:

- Limit access by role (CSR, producer, broker)
- Mask commissions and PII as needed

5. Sync Logic

Determine:

Cadence: Real-time, scheduled, or triggered

Volume: Full sync or delta-based

Direction: One-way, bidirectional, or conditional logic

Error Handling: Create retry, alert, or fallback systems

Integration Approaches

Integration Approaches	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.	Data is pulled from BigQuery replica, transformed, and pushed to HubSpot.	Uses platforms like Workato & Boomi to build syncs + workflows.	Combines APIs, BigQuery, and custom middleware for scoped access.
Integration Factors	Requires polling logic, token refresh, and logging.	Supports complex joins + full dataset control. Scheduled syncs.	Easy setup, but limited flexibility for nested or high-volume data.	Impersonation, field-level security, and full audit trails.
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 <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> Track closed-won policies by LOB and rep Monitor NPS and support volume by client segment Attribute marketing influence to policies sold
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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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