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	Applied Systems (EPIC)	Applied Systems (TAM)	Brokercore Inc	Keal Technology	Power Broker	Tech Canary
Technical capabilities						
Sales, marketing and customer relationship management						
Client self-serve capabilities						
Billing and accounting						
Integration capabilities						
Reporting, analytics and business intelligence						
Artificial intelligence (AI)						
Maintenance support						
Development support						
Conversion from existing broker management system						
Roadmap development transparency						
Best presentation						

## Grading

Vendors were scored out of 100 in each category.



= highest score



= second-highest score



= third-highest score

See reverse for a description of the categories.

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**Technical capabilities** – Features related but not limited to the system’s core technology, software and database architecture.

**Sales, marketing and customer relationship management** – Tools to help brokers better understand their customers, effectively communicate with them and identify products to meet their needs. Examples include lead sourcing and scoring, email campaign software and client segmentation capabilities.

**Client self-serve capabilities** – The system gives customers control over their own insurance experience. Examples include allowing them to get a quote and bind online, report a claim, make changes to their policy, make a payment or change payment information.

**Billing and accounting** – Critical features that enable brokerages to efficiently and effectively manage financial transactions regardless of the province or line of business they are in.

**Integration capabilities** – The system can be integrated with third-party applications and insurance carrier APIs (application programming interfaces).

**Reporting, analytics and business intelligence** – The system can generate and customize reports for various functions across a brokerage including sales, claims, digital marketing, billing, accounting, etc.

**Artificial intelligence** – Features that help reduce the amount of time spent on manual work. For example, the system is autonomous and can recommend products for customers or identify exposure risks based on a customer’s profile.

**Maintenance support** – Critical items that vendors can provide to ensure the day-to-day functionality of the BMS.

**Development support** – The system has the ability to provide an additional level of support for development and platform customization.

**Conversion from existing BMS** – Vendor support for the automated switching of the BMS platform.

**Roadmap development transparency** – The vendor’s level of communication with brokers regarding future development. This category also captures the vendor’s philosophy of sharing this information with brokers.

**Best presentation** – The presentation was clear and concise, flowed logically, and covered all categories outlined in the scorecard.