# Applied Epic Customization Projects Best Practices for Managing Stakeholders and Scope

**Published on 11 June 2025 at 18:39**

**By Kimberly Wiethoff**

Implementing or optimizing **Applied Epic** is rarely a plug-and-play project. Customization is often necessary to align the system with your agency’s unique workflows, compliance needs, and customer service models. But with great flexibility comes complexity—especially for project managers tasked with balancing stakeholder expectations, technical constraints, and timelines.

In this post, we’ll explore how to successfully manage **Applied Epic customization projects**, focusing on stakeholder alignment, scope control, and long-term scalability.

## 1. Identify the Right Stakeholders Early

Customization requests often originate from multiple departments—service teams want faster quoting, accounting needs specialized reports, and producers ask for more CRM features.

To manage this well:

* **Map stakeholders by role and function** (e.g., CSR, Accounting, Sales, IT Admin)
* **Include power users and “super users”** in the planning process
* **Set up a steering committee or working group** to validate priorities

Engaging a cross-functional group ensures customizations solve real problems and avoid duplication or misalignment.

## 2. Document and Prioritize Custom Requests

Customization in Applied Epic can include:

* Custom forms and templates
* Unique workflows or activities
* User-defined fields (UDFs)
* Automated reports or dashboards
* Specific security roles and access levels

Use a **centralized backlog** (e.g., in Jira, Excel, or SharePoint) to track:

* Request details
* Business justification
* Priority (e.g., must-have, nice-to-have)
* Estimated effort

Then work with your stakeholders to rank by business value—not just who shouts the loudest.

## 3. Align Customization Scope with System Capabilities

Not all requests are feasible—or wise—to implement. Project managers should:

* **Work with Applied Epic admins or consultants** to confirm what’s configurable vs. what requires development or vendor support
* **Validate if a workaround exists using workflows, dashboards, or activities**
* **Ensure customizations don’t create upgrade barriers** down the road

Create a “guardrail” document defining what types of customizations are acceptable, and which ones are discouraged.

## 4. Define the Scope… and Guard It Relentlessly

Scope creep is a major risk in customization-heavy Epic projects. To manage it:

* **Baseline your scope** after the requirements-gathering phase
* **Use change request logs** to track additions or adjustments
* **Communicate clearly** what’s in vs. out of scope, and revisit this regularly with stakeholders

If scope must change, assess the impact to schedule, cost, and testing, and document formal approvals.

## 5. Test Customizations from a User Perspective

Don’t just test for functionality—test for **usability and value**:

* Use **real-world scenarios** during User Acceptance Testing (UAT)
* Involve **end users from every impacted team**
* Ensure customizations improve workflows—not just automate old habits

Capture feedback and adjust before full deployment. A small change that reduces clicks or errors can have a big ROI.

## 6. Maintain a Customization Register for Ongoing Governance

After go-live, ensure there’s a record of:

* All implemented customizations
* Their purpose and owner
* Support contacts or dependencies
* Update/review cycle

This helps with troubleshooting, onboarding, audits, and future upgrades.

## Final Thoughts

Customization can unlock powerful efficiencies in Applied Epic—but only if approached strategically. By involving the right stakeholders, prioritizing business value, setting clear scope boundaries, and planning for long-term maintainability, project managers can ensure their Epic environment truly supports the agency’s goals.

**#AppliedEpic #ProjectManagement #InsuranceTech #CustomizationStrategy #WorkflowOptimization #StakeholderEngagement #ScopeManagement #EpicAdmin #Insurtech #ManagingProjectsTheAgileWay**

## Resources

Here are curated **reads and resources**—with direct links—to help project managers effectively oversee customization projects in **Applied Epic**:

### 📘 Best Practices for Workflow Customization

* **5 Best Practices for Applied Epic Workflow Development**
Covers workflow impact, super-user involvement, testing, documentation, and periodic reviews. ([kitetechgroup.com](https://www.kitetechgroup.com/5-best-practices-for-applied-epic-workflow-development/?utm_source=chatgpt.com))
[Read here](https://www.kitetechgroup.com/5-best-practices-for-applied-epic-workflow-development/)

### ⚙️ Official Configuration Guides

* **myEpic Workflows Configuration**
Step-by-step instructions on editing, activating, and exporting custom workflows within Applied Epic. ([kitetechgroup.com](https://www.kitetechgroup.com/5-best-practices-for-applied-epic-workflow-development/?utm_source=chatgpt.com), [help.appliedsystems.com](https://help.appliedsystems.com/Help/Epic/2023.2en-US/Configure/myEpic/myEpic_Workflow_Configuration.htm?utm_source=chatgpt.com))
[View full guide](https://help.appliedsystems.com/Help/Epic/2023.2en-US/Configure/myEpic/myEpic_Workflow_Configuration.htm)

### 🗂️ Foundation & Strategy

* **Essential Evaluation Criteria for Selecting Your Agency Management Software**
An Applied systems blog post highlighting the value of customized automation and integrated workflows. ([www1.appliedsystems.com](https://www1.appliedsystems.com/en-us/blog/posts/essential-evaluation-criteria-for-selecting-your-insurance-agency-management-software/?utm_source=chatgpt.com))
[Read article](https://www1.appliedsystems.com/en-us/blog/posts/essential-evaluation-criteria-for-selecting-your-insurance-agency-management-software/)

### 🛠️ Practical Training Documents

* **Applied EPIC Basics & Home Base (PDF)**
Workflow training manual covering interface customization, views, columns, and notification setup. ([www1.appliedsystems.com](https://www1.appliedsystems.com/en-us/blog/posts/essential-evaluation-criteria-for-selecting-your-insurance-agency-management-software/?utm_source=chatgpt.com), [craneagency.com](https://www.craneagency.com/wp-content/uploads/2017/05/Applied-EPIC-Basics-Home-Base-5.20.17-dmb.pdf?utm_source=chatgpt.com))
[Download PDF](https://www.craneagency.com/wp-content/uploads/2017/05/Applied-EPIC-Basics-Home-Base-5.20.17-dmb.pdf)

### 💡 User Tips & Configuration

* **Applied Epic Tips & Techniques (PDF)**
A collection of over 100 user insights—highlighting shortcuts, UI tweaks, and workflow optimizations. ([aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com](https://aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com/acn_58d08c249b63f96ed55861865747a47b.pdf?utm_source=chatgpt.com))
[Access PDF](https://aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com/acn_58d08c249b63f96ed55861865747a47b.pdf)
* **30 Tips on Using Applied Epic**
Community-sourced tips for enhancing efficiency and system interaction. ([aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com](https://aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com/acn_58d08c249b63f96ed55861865747a47b.pdf?utm_source=chatgpt.com), [appliedclientnetwork.org](https://www.appliedclientnetwork.org/Connections/30-tips-on-using-applied-epic?utm_source=chatgpt.com), [www1.appliedsystems.com](https://www1.appliedsystems.com/en-us/blog/posts/enhance-agency-initiatives-strategies-success/?utm_source=chatgpt.com))
[Explore tips](https://www.appliedclientnetwork.org/Connections/30-tips-on-using-applied-epic)

### 📈 Advanced Customization Insights

* **How to Customize Epic: A Step-by-Step Guide**
Although healthcare-EHR-focused, this guide offers strategic insights on customization governance and best practices. ([appliedclientnetwork.org](https://www.appliedclientnetwork.org/Connections/30-tips-on-using-applied-epic?utm_source=chatgpt.com), [topflightapps.com](https://topflightapps.com/ideas/how-to-customize-epic/?utm_source=chatgpt.com))
[Read the guide](https://topflightapps.com/ideas/how-to-customize-epic/)

### 📊 Better Reporting Practices

* **Tips for Improving Reporting in Applied Epic**
Strategies for leveraging custom reports, maintaining data integrity, and driving accuracy. ([topflightapps.com](https://topflightapps.com/ideas/how-to-customize-epic/?utm_source=chatgpt.com), [kitetechgroup.com](https://www.kitetechgroup.com/tips-and-tricks-for-improving-reporting-in-applied-epic/?utm_source=chatgpt.com))
[Learn more](https://www.kitetechgroup.com/tips-and-tricks-for-improving-reporting-in-applied-epic/)

### 🧭 Workflow Configuration Handouts

* **Events, Activities, Tasks & Further Actions (PDF)**
Seminar materials focusing on activity-based workflows, task automation, and consistency. ([aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com](https://aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com/acn_72f96c859c14c680dcd29c888146adf0.pdf?utm_source=chatgpt.com))
[Download handout](https://aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com/acn_72f96c859c14c680dcd29c888146adf0.pdf)

### 🧭 Central Hub for Epic Resources

* **Applied Systems – Browse All Resources**
A comprehensive library featuring webinars, data sheets, eBooks, and whitepapers—filtered for Applied Epic. ([aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com](https://aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com/acn_72f96c859c14c680dcd29c888146adf0.pdf?utm_source=chatgpt.com), [www1.appliedsystems.com](https://www1.appliedsystems.com/en-us/resources/?utm_source=chatgpt.com))
[Access Resource Library](https://www1.appliedsystems.com/en-us/resources/)