# Mastering Applied Epic: What Every Insurance Project Manager Should Know

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Applied Epic is the cornerstone of operations for many insurance agencies, providing a unified platform to manage customer relationships, policy administration, accounting, and reporting. For project managers leading system implementations, migrations, or enhancements involving Applied Epic, a solid understanding of its capabilities and challenges is crucial for delivering successful outcomes.

Whether you're managing a new Epic implementation, a third-party integration, or a workflow optimization initiative, this guide highlights the core areas project managers need to know.

## 1. Understand the Epic Ecosystem

Applied Epic isn’t just a policy management system — it’s an enterprise platform that connects sales, service, accounting, and reporting across the entire agency. Project managers should familiarize themselves with:

* **Policy Management**: New business, renewals, endorsements, cancellations
* **Accounting Module**: Trust and operating account transactions, commissions
* **Activities & Tasks**: Workflow-driven communication and follow-up
* **Reporting & Dashboards**: Book of business, producer performance, renewals
* **Integration Capabilities**: BenefitPoint, ImageRight, and other Applied products

Understanding how departments rely on Epic ensures you’re aligning project goals with business needs.

## 2. Define Clear Project Scope and Stakeholders Early

Epic projects often impact multiple departments. It’s essential to:

* **Identify all stakeholders** (producers, CSRs, accounting, IT)
* **Define success metrics** (e.g., time to quote, reduced E&O, improved user satisfaction)
* **Clarify customization vs. out-of-the-box expectations**
* **Address compliance or regulatory reporting needs** upfront

Many delays and change orders stem from misaligned expectations or unaccounted use cases during discovery.

## 3. Plan for Data Accuracy and Cleanup

A common challenge in Epic projects is ensuring data integrity during migration or integration. As PM, build in time for:

* **Data mapping from legacy systems**
* **Deduplication and cleansing**
* **Testing scenarios** (quotes, renewals, certificates, billing)
* **User acceptance testing (UAT)** to validate business workflows

Poor data leads to downstream inefficiencies, client service issues, and audit risks.

## 4. Build a Change Management Strategy

Change resistance is a major barrier to Epic adoption. Address it with:

* **Early user involvement in design decisions**
* **Training tailored by role** (e.g., CSR vs. producer vs. accounting)
* **Super-user programs** to support day-to-day questions post-launch
* **Communication plans** to keep stakeholders informed of milestones, impacts, and wins

Epic is only as powerful as the people using it — so help them succeed.

## 5. Leverage Applied Support and Vendor Resources

Don’t go it alone. Use resources provided by Applied Systems, such as:

* **Applied University** for on-demand training
* **Epic Implementation Guides and Admin Docs**
* **User groups and online communities** for lessons learned
* **Your Applied Account Manager or Consultant** for project planning and issue escalation

Engaging these resources helps reduce risk, accelerate timelines, and build internal credibility.

## Final Thoughts

Project managers who understand Applied Epic’s architecture, user workflows, and integration points are better equipped to lead impactful, cost-effective implementations. By taking a strategic approach — grounded in business goals, stakeholder engagement, and data quality — you can ensure your Epic project not only meets requirements but transforms how your agency works.

**#InsuranceTech #ProjectManagement #AppliedEpic #AgencyManagement #InsurtechProjects #DigitalTransformation #DataMigration #ChangeManagement #InsuranceSoftware #WorkflowOptimization #ManagingProjectsTheAgileWay**

Here are several valuable resources—ranging from official documentation and user tips to technical guides and webinars—curated for project managers diving into **Applied Epic** implementation:

## 📘 Official Documentation & Learning Platforms

* **Applied Epic Overview & Capabilities** – A comprehensive introduction straight from the vendor. Covers core features, integrations, and platform architecture. ([www1.appliedsystems.com](https://www1.appliedsystems.com/en-us/solutions/for-agents/agency-management-system/applied-epic/?utm_source=chatgpt.com))
* **Customer Success Hub (Applied Systems)** – Filterable resources including video walk-throughs, job aids, webinars, and best-practice guides specifically for Applied Epic. ([www1.appliedsystems.com](https://www1.appliedsystems.com/en-us/customer-success-hub/resources/?utm_source=chatgpt.com))

## 🛠️ Tips, Techniques & User Shared Best Practices

* **“30 Tips on Using Applied Epic”** – User-generated insights from the Applied Client Network covering shortcuts, clean-up suggestions, and productivity hacks. ([appliedclientnetwork.org](https://www.appliedclientnetwork.org/Connections/30-tips-on-using-applied-epic?utm_source=chatgpt.com))
* **Applied Epic Tips and Techniques (PDF)** – A deep dive into over 100 actionable tips across servicing, workflows, reporting, and UI customization. ([aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com](https://aef74ece4099e58b4dd7-d5c21543bc89fb307518c30635b7df55.ssl.cf2.rackcdn.com/acn_58d08c249b63f96ed55861865747a47b.pdf?utm_source=chatgpt.com))

## 🔄 Change & Migration Guides

* **Epic Change Management: 5 Tips for a Successful Migration** – Key strategies for governance, training cadence, staff accountability, and change advocacy. ([www1.appliedsystems.com](https://www1.appliedsystems.com/globalassets/all-documents/resources/ebooks-guides-infographics/change-management-5-tips.pdf?utm_campaign=TAM-to-Epic-Migration&utm_content=Guide&utm_medium=Web&utm_term=&utm_source=chatgpt.com))
* **Checklist for Rolling Out the Applied Epic Browser Interface** – A practical playbook for launch planning, pilot workflow validation, program oversight, and technical rollout. ([www1.appliedsystems.com](https://www1.appliedsystems.com/link/e8b6ca410e8b438e8fb3d7f62c4f3a45.aspx?utm_source=chatgpt.com))

## 💻 Developer & Integration Resources

* **Applied Epic SDK Technical Guide** – In-depth details on versioning, backward compatibility policies, and upgrade best practices for developers using the Epic SDK. ([help.appliedsystems.com](https://help.appliedsystems.com/Help/EpicSDK/2020.1/html/1df16546-c718-43f8-9680-b9a6e056e89e.htm?utm_source=chatgpt.com))
* **Using the Applied Epic API (JavaScript)** – Step-by-step tutorial demonstrating how to connect, authenticate, and fetch client data via the Epic API programmatically. ([endgrate.com](https://endgrate.com/blog/using-the-applied-epic-api-to-get-clients-in-javascript?utm_source=chatgpt.com))

## 🎥 Webinars & Video Tutorials

* **Applied Epic Tips and Tricks – End User Efficiency** – A YouTube webinar offering around 9 months ago with workflows and efficiency-enhancing demos. ([youtube.com](https://www.youtube.com/watch?v=2OVhzUrRifg&utm_source=chatgpt.com))

## ✅ Quick Link List

| **Resource** | **Description** |
| --- | --- |
| [Applied Epic Overview & Capabilities](https://www1.appliedsystems.com/en-us/solutions/for-agents/agency-management-system/applied-epic/) | Official vendor page |
| [Customer Success Hub](https://www1.appliedsystems.com/en-us/customer-success-hub/resources/) | Filterable guides & aids |
| [30 Tips on Using Applied Epic](https://www.appliedclientnetwork.org/Connections/30-tips-on-using-applied-epic) | Community insights |
| [Applied Epic Tips & Techniques (PDF)](https://rackcdn.com/acn_58d08c249b63f96ed55861865747a47b.pdf) | 100+ practical tips |
| [Epic Change Management Guide (PDF)](https://www1.appliedsystems.com/globalassets/all-documents/resources/ebooks%E2%80%90guides%E2%80%90infographics/change-management-5-tips.pdf) | Migration best practices |
| [Browser Interface Rollout Checklist (PDF)](https://www1.appliedsystems.com/link/e8b6ca410e8b438e8fb3d7f62c4f3a45.aspx) | Implementation checklist |
| [Applied Epic SDK Guide](https://help.appliedsystems.com/Help/EpicSDK/2020.1/html/1df16546%E2%80%91c718%E2%80%9143f8%E2%80%919680%E2%80%91b9a6e056e89e.htm) | Developer best practices |
| [Applied Epic API with JavaScript](https://endgrate.com/blog/using-the-applied-epic-api-to-get-clients-in-javascript) | API integration tutorial |
| [YouTube: Epic Tips & Tricks](https://www.youtube.com/watch?v=2OVhzUrRifg) | Efficiency webinar |