



Applied Epic Customization: Stakeholder & Scope Management

Successfully implementing Applied Epic requires careful customization to match your agency's unique workflows, compliance requirements, and service models. While the system offers remarkable flexibility, this creates complexity for project managers balancing stakeholder expectations against technical constraints.

This presentation explores best practices for managing Applied Epic customization projects, with a focus on stakeholder alignment, scope control, and ensuring long-term scalability—key factors that determine whether your implementation succeeds or struggles.

 **by kimberly Wiethoff**



Identifying the Right Stakeholders



Map Stakeholders by Role

Create a comprehensive map covering all roles and functions (CSRs, Accounting, Sales, IT Admins) to ensure all needs are represented



Include Power Users

Engage your "super users" who understand the system best and can advocate for practical solutions



Form a Steering Committee

Establish a cross-functional working group to validate priorities and ensure customizations solve real business problems

Early stakeholder identification prevents the common pitfall of creating customizations that solve isolated problems while creating workflow issues elsewhere. This cross-functional approach ensures your Epic implementation delivers organization-wide value.

Documenting Custom Requests

What to Customize

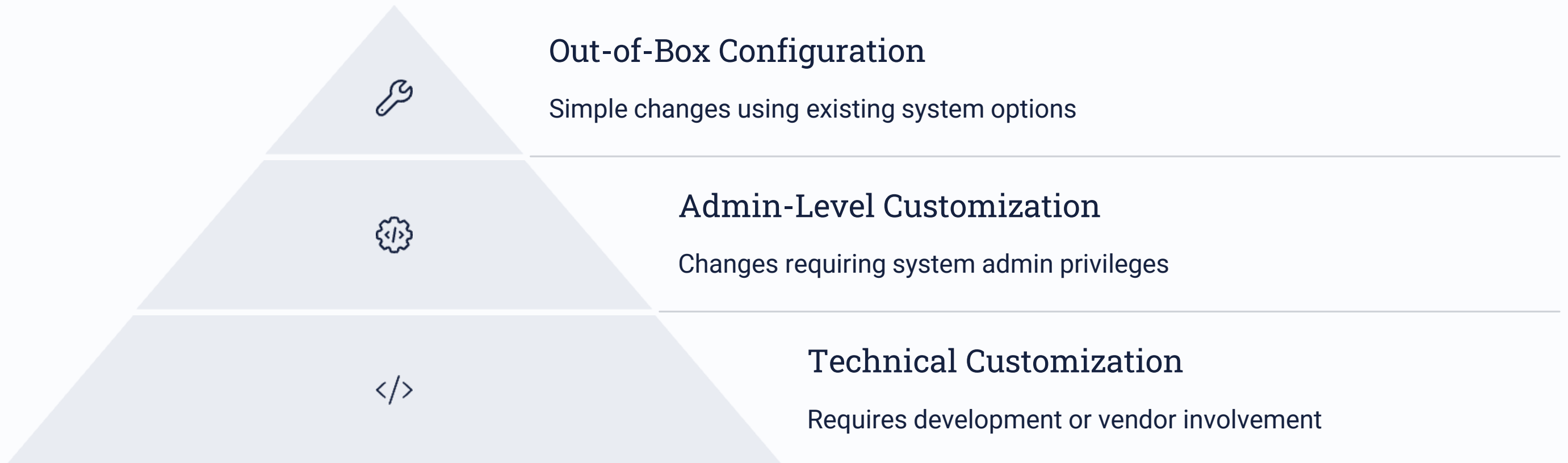
- Custom forms and templates
- Unique workflows or activities
- User-defined fields (UDFs)
- Automated reports/dashboards
- Security roles and access levels

What to Document

- Detailed request specifications
- Business justification
- Priority classification
- Estimated implementation effort
- Dependencies and stakeholders

Using a centralized backlog tool like Jira, Excel, or SharePoint helps track all requests and prevents "hallway requirements" from derailing your project. Work with stakeholders to rank by business value rather than responding to whoever makes the loudest demands.

Aligning Scope with System Capabilities



Not every request is feasible to implement—or wise to pursue. Work with Applied Epic administrators or consultants to determine what's configurable versus what requires custom development or vendor support. Validate if workarounds exist using workflows, dashboards, or activities before committing to complex customizations.

Create "guardrail" documentation defining acceptable customization types to prevent future upgrade complications. This proactive approach prevents technical debt that can hinder your agency's agility.

Defining and Protecting Project Scope

Baseline Requirements
Document and approve initial scope
after requirements gathering

Formalize Changes
Document approvals and update
project baseline



Guard Against Creep
Implement change control processes
to manage new requests

Assess Impact
Evaluate schedule, budget and quality
effects of changes

Scope creep represents a major risk in customization-heavy Epic projects. Establish your scope baseline after the requirements phase and use change request logs to track additions or adjustments. Communicate regularly with stakeholders about what's in versus out of scope to manage expectations effectively.



Testing Customizations for Value



Design Test Scenarios

Create real-world use cases that reflect actual daily operations



Engage End Users

Include representatives from every impacted department



Measure Improvements

Compare metrics against pre-customization baseline



Refine & Adjust

Implement feedback before full deployment

Don't just test for functionality—test for usability and business value. Using real-world scenarios during User Acceptance Testing (UAT) with end users from every impacted team ensures customizations truly improve workflows rather than simply automating old inefficient processes.

Maintaining a Customization Register

Customization Name	Purpose	Business Owner	Support Contact	Review Cycle
Producer Dashboard	Sales Pipeline Tracking	Sales Director	Epic Admin Team	Quarterly
Renewal Workflow	Streamline Renewals	Service Manager	Operations Analyst	Semi-Annual
Custom Client Fields	Regulatory Compliance	Compliance Officer	IT Support	Annual

After go-live, maintain a comprehensive record of all implemented customizations. Document their purpose, business owner, support contacts, dependencies, and review cycle. This register becomes invaluable for troubleshooting, employee onboarding, compliance audits, and planning future system upgrades.

A well-maintained register transforms tribal knowledge into organizational documentation, reducing risk when key personnel change roles or leave the organization.

An illustration of a meeting in a modern office. Three people are seated around a table, looking at a large, complex diagram of a system architecture. The diagram consists of numerous interconnected nodes, boxes, and lines, representing a highly customized and potentially over-engineered system. One person is pointing at the diagram, while another has their hands on their head, suggesting frustration or confusion. The scene is lit with a bright, futuristic light fixture hanging from the ceiling.

Common Customization Pitfalls

Over-Customization

Modifying everything possible rather than accepting standard functionality where appropriate, creating unnecessary complexity and maintenance burden

Digitizing Bad Processes

Customizing Epic to match inefficient legacy workflows instead of taking the opportunity to improve and streamline operations

Ignoring Upgrade Impacts

Implementing customizations that create barriers to future system upgrades, effectively locking the agency into an outdated version

Inadequate Documentation

Failing to document the purpose, function, and maintenance procedures for customizations, creating knowledge silos dependent on specific individuals

Recognizing these common pitfalls helps project managers avoid them. Remember that the most successful Epic implementations balance customization with standardization, leveraging out-of-box functionality where possible while customizing strategically for genuine competitive advantage.

Building an Effective Governance Model



Executive Sponsorship

Senior leadership support and clear ownership



Decision Framework

Established criteria for evaluating requests



Change Control Board

Cross-functional team reviewing all changes



Standardized Processes

Consistent request and approval workflows

Effective governance provides the structure needed to manage customizations over time. Establish a cross-functional Change Control Board with representation from IT, operations, and business units to evaluate new customization requests against established criteria focused on business value, strategic alignment, and technical feasibility.

This governance model helps balance innovation with standardization, ensuring Epic remains both customized to your needs and sustainable over time.

Training for Customized Environments



Role-Based Training

Create targeted training modules specific to each department's customizations rather than generic system overviews



Custom Documentation

Develop agency-specific user guides that reflect your customized workflows and screen layouts



Video Tutorials

Record screen captures demonstrating common tasks in your customized environment for just-in-time learning



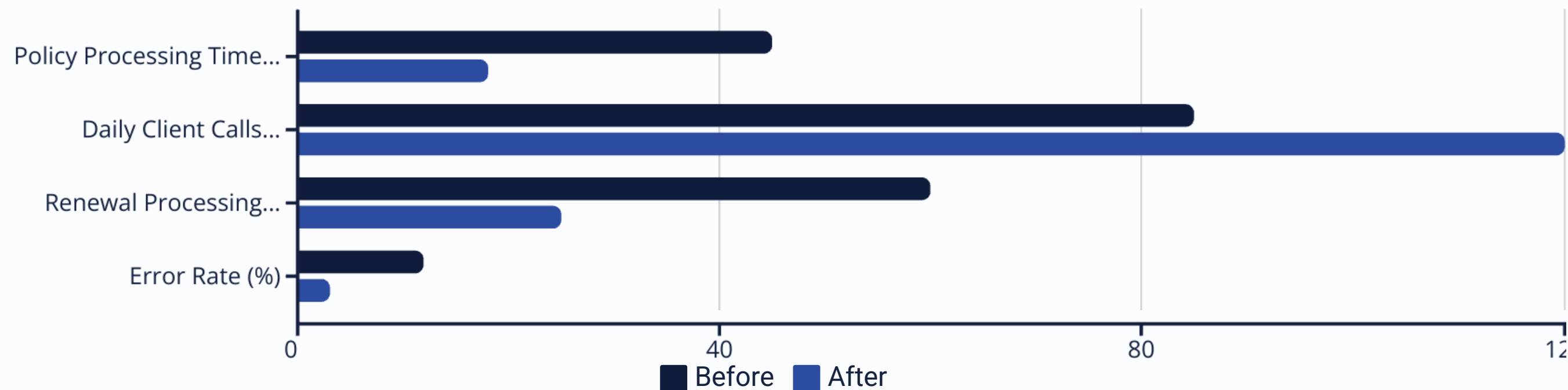
Super User Network

Establish a network of advanced users who can provide peer support for customized features

Generic Applied Epic training often falls short when agencies implement significant customizations. Develop agency-specific training materials that address your unique workflows, custom fields, and specialized processes to ensure adoption and proper utilization of customized features.



Measuring Customization ROI



Quantify the business impact of your customizations by tracking key performance indicators before and after implementation. Focus on metrics that matter to the business: processing times, error rates, customer satisfaction scores, and producer efficiency. This data helps justify the investment and builds support for future optimization efforts.

Don't limit measurement to technical metrics—the true value of customizations comes from business outcomes like improved client retention, increased sales, and enhanced compliance capabilities.

Key Takeaways for Project Success

1 Start with the Business, Not the Technology

Focus customization efforts on solving genuine business problems rather than implementing features simply because they're available. Every customization should tie directly to agency goals or client experience improvements.

2 Balance Flexibility with Standardization

Find the right mix between customizing for competitive advantage and leveraging standard functionality for stability and upgrade compatibility. Not everything needs to be—or should be—customized.

3 Plan for the Full Lifecycle

Consider the long-term implications of customizations, including maintenance requirements, upgrade impacts, and staff training needs. Today's perfect solution can become tomorrow's technical debt if not properly managed.

Applied Epic customizations can transform your agency operations when implemented strategically. By following these best practices for stakeholder management and scope control, you'll create an environment that balances unique agency needs with system stability and scalability.

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.



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