



Mastering Applied Epic: What Every Insurance Project Manager Should Know

Applied Epic forms the backbone of operations for many insurance agencies, providing a unified platform for customer relationships, policy administration, accounting, and reporting. For project managers leading system implementations, migrations, or enhancements, understanding Epic's capabilities is essential for success.

This presentation will guide you through the critical knowledge areas and strategies needed to effectively manage Applied Epic projects, from initial planning to successful implementation and adoption.



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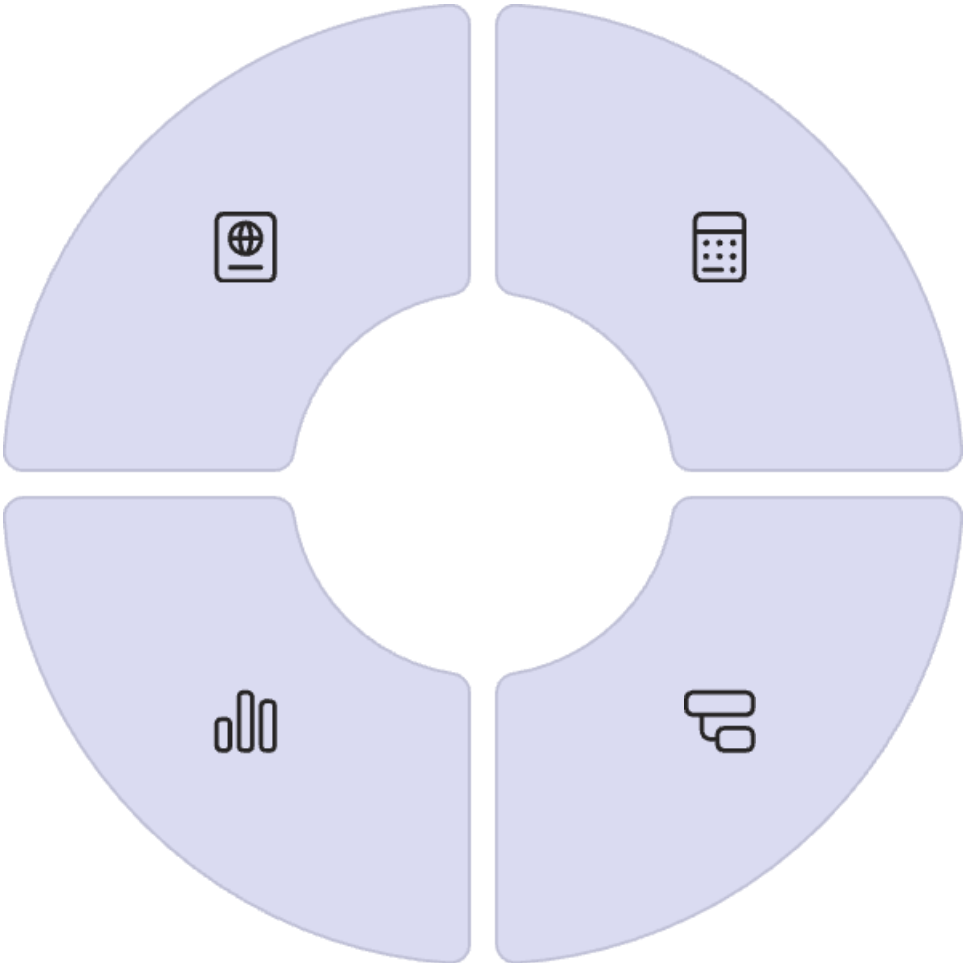
The Applied Epic Ecosystem

Policy Management

Handles new business, renewals, endorsements, and cancellations through a unified interface

Reporting & Dashboards

Provides insights on book of business, business, producer performance, and upcoming renewals



Accounting Module

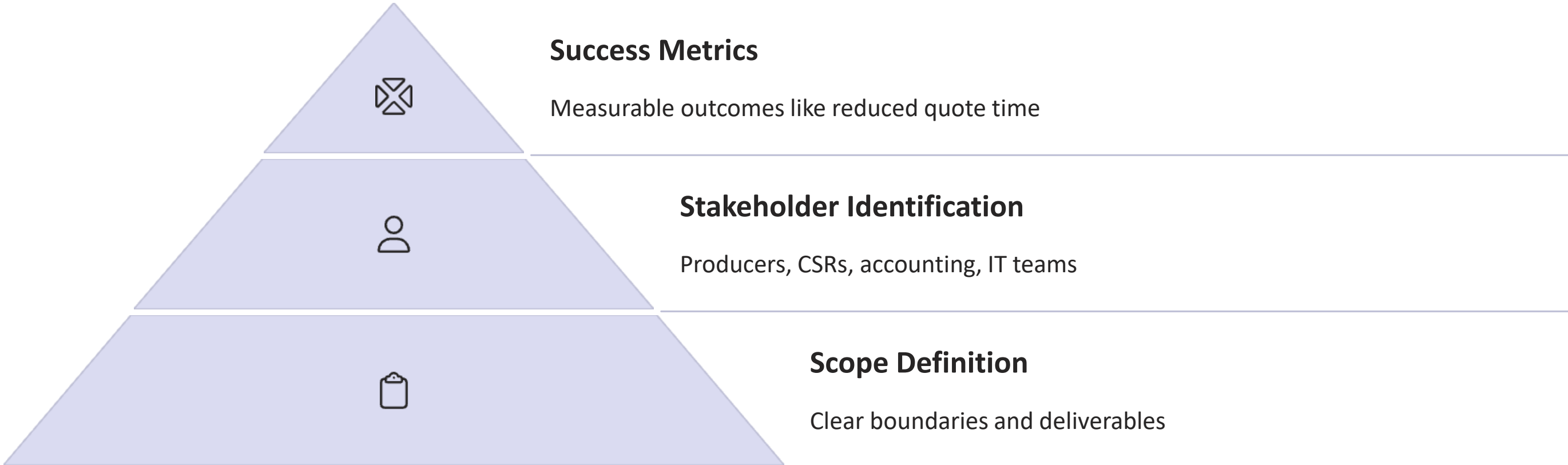
Manages trust and operating account transactions, commissions tracking, and financial reporting

Activities & Tasks

Facilitates workflow-driven communication communication and follow-up processes processes across teams

Applied Epic isn't just a policy management system—it's an enterprise platform connecting your entire agency. Understanding how each department relies on Epic ensures you align project goals with business needs and prepare for cross-functional cross-functional impacts.

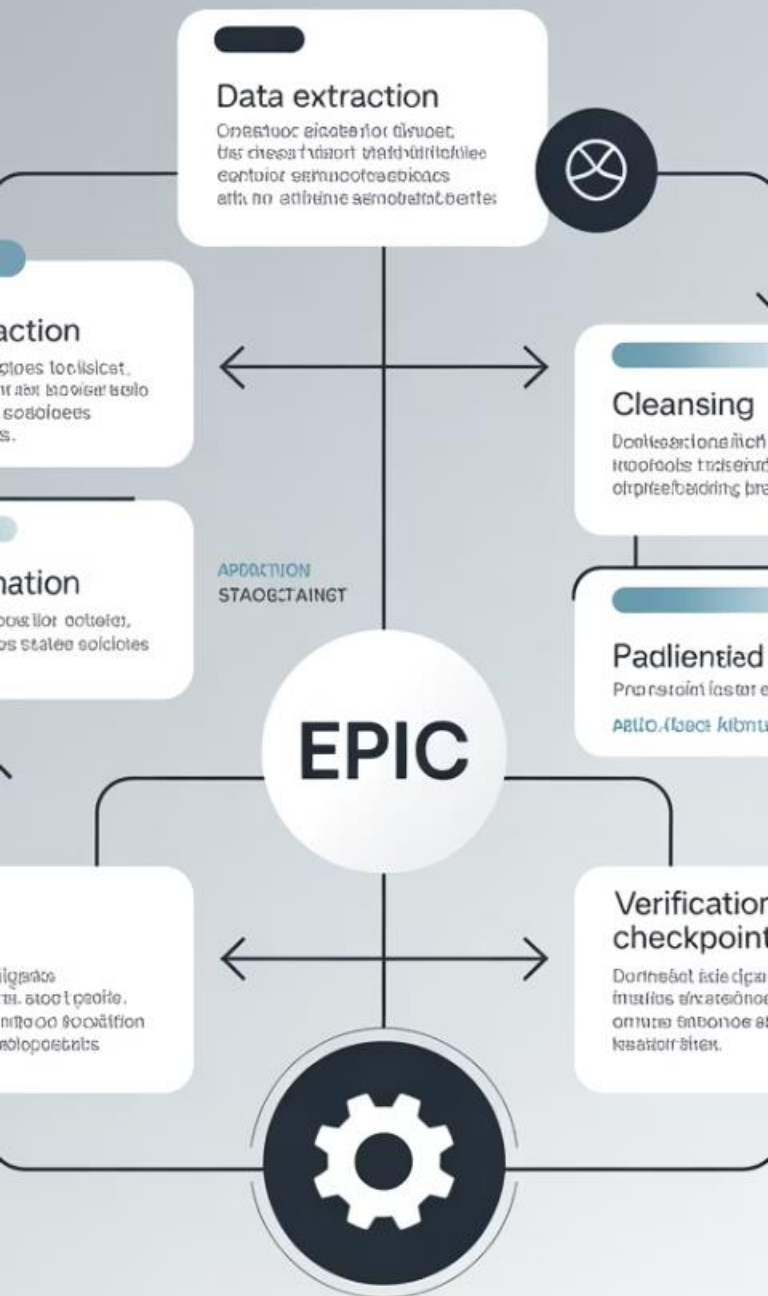
Defining Project Scope and Stakeholders



Epic projects often impact multiple departments with varying needs and expectations. Clear scope definition prevents scope creep and ensures alignment across the organization. Many project delays stem from misaligned expectations or unaccounted use cases during discovery.

Invest time upfront to clarify customization versus out-of-the-box expectations and address compliance or regulatory reporting requirements that requirements that might impact implementation.

DATA MIGRATION FL



Planning for Data Migration

Data Mapping

Create comprehensive field mapping documents between legacy systems and Applied Epic schema, identifying schema, identifying transformation rules and data ownership.

Cleansing & Deduplication

Implement processes to identify and resolve duplicate records, standardize formats, and validate critical fields before migration.

Validation & Testing

Conduct thorough testing with business scenarios including quotes, renewals, certificates, and billing cycles to verify data integrity.

Poor data migration leads to downstream inefficiencies, client service issues, and compliance risks. Build sufficient time into your project plan for multiple test migrations and validation cycles, particularly for agencies migrating from legacy systems with years of historical data.



Data Quality Assurance

1

Critical Data Points

- Client contact information information
- Policy effective/ expiration dates
- Premium and commission commission values
- Coverage limits and deductibles

2

Validation Methods

- Automated data quality scans
- Exception reporting
- Sampling validation
- Cross-reference checks

3

Post-Migration Verification

- User acceptance testing
- Financial reconciliation
- Policy status verification
- Workflow validation

Data quality directly impacts user adoption and client service. Project managers should establish quality thresholds and remediation processes for addressing data issues. Implement both automated and manual verification to ensure data integrity throughout the implementation lifecycle.

Change Management Strategy



Early User Involvement

Include key users in design decisions and workflow mapping to build ownership and gather practical insights



Role-Based Training

Develop tailored training programs for CSRs, producers, accounting, and management with relevant scenarios



Super-User Program

Identify and prepare champions within each department to provide first-line support and promote adoption



Communication Plan

Maintain regular updates on milestones, impacts, and wins to build momentum and manage expectations

Change resistance is a major barrier to Epic adoption. Users comfortable with legacy systems need compelling reasons to embrace new workflows and features. workflows and features. Your change management approach should address both the technical and emotional aspects of the transition.



External Resources and Support



Applied University

Leverage on-demand training courses and certification programs to build internal expertise and supplement project team knowledge



Implementation Guides

Utilize comprehensive documentation provided by Applied Systems to understand best practices and avoid common pitfalls



User Communities

Engage with online forums and user groups to learn from peer experiences and gather innovative implementation approaches



Account Management

Maintain close communication with your Applied Account Manager for escalation support and strategic guidance

Don't reinvent the wheel. Applied Systems offers extensive resources that can accelerate your implementation timeline and help you navigate complex challenges. Building relationships with these external resources early in your project lifecycle creates valuable support channels.

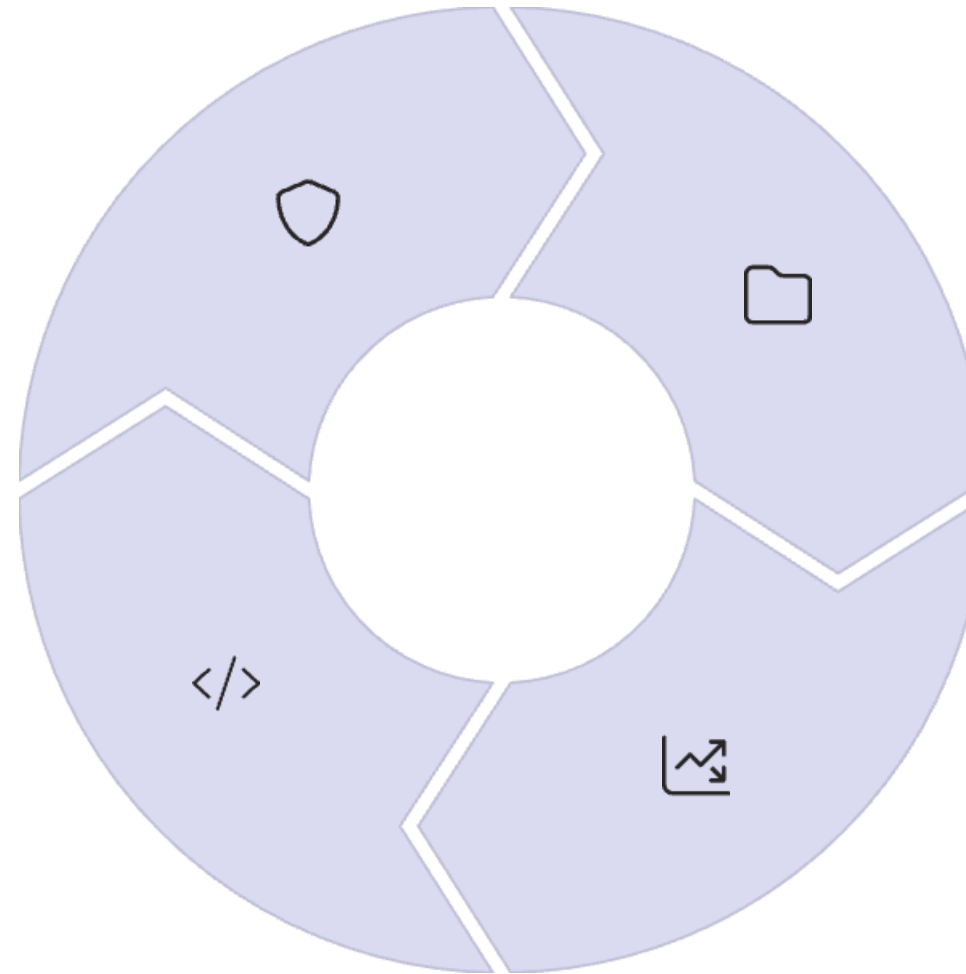
Integration Capabilities

Carrier Connectivity

Direct integration with carrier systems for quoting, binding, and policy servicing

Custom Applications

API capabilities for connecting with agency-specific tools and services



Document Management

Seamless connection with ImageRight and other document repositories

Benefits Management

Integration with BenefitPoint for comprehensive benefits administration

Applied Epic's value multiplies when properly integrated with your agency's technology ecosystem. Project managers should map all integration points early in the planning process and involve IT stakeholders to assess technical requirements and potential challenges. Consider phasing complex integrations to manage risk and ensure core functionality is stable before extending the system.



Testing Methodology



Unit Testing

Verify individual components function correctly in isolation, focusing on specific workflows and features



Integration Testing

Validate that connected systems exchange data correctly and maintain integrity across boundaries



User Acceptance Testing

Engage business users to test real-world scenarios and validate that the system meets operational needs



Performance Testing

Measure system responsiveness under various load conditions to ensure acceptable user experience

A structured testing approach identifies issues before they impact production. Develop comprehensive test plans covering critical insurance workflows like new business processing, renewals, processing, renewals, endorsements, and accounting functions. Document test cases with clear pass/fail criteria to maintain accountability.

Epic Workflow Optimization

Common Pain Points

- Redundant data entry
- Manual handoffs between teams
- Inconsistent process adherence
- Limited visibility into bottlenecks
- Compliance documentation gaps

Epic Solutions

- Automated activity creation
- Role-based task assignment
- Standardized service workflows
- Real-time workload dashboards
- Built-in compliance tracking

Implementation Approach

Map current workflows first, then design optimized processes in Epic that eliminate redundancies while maintaining necessary controls. Involve process owners in design sessions and develop clear transition plans from old to new workflows.

Simply replicating existing processes in Epic misses opportunities for transformation. Project managers should challenge stakeholders to stakeholders to reimagine workflows that leverage Epic's capabilities rather than forcing the system to conform to legacy processes. processes.

Risk Management in Epic Projects

Identify potential risks

Document technical, resource, and business risks

Assess impact and probability

Evaluate severity and likelihood of occurrence

Develop mitigation strategies

Create action plans to reduce or eliminate risks

Monitor continuously

Track risk indicators throughout project lifecycle

Epic implementations involve significant organizational change and technical complexity. Common risks include data migration issues, resource migration issues, resource constraints, scope creep, and user adoption challenges. Establish a risk register early and review it regularly with stakeholders.

Develop contingency plans for critical risks, particularly around go-live scenarios where business continuity is essential.

Post-Implementation Success Metrics

42%

Time Savings

Average reduction in policy processing time after optimization

87%

User Adoption

Percentage of users actively using new Epic workflows

23%

Error Reduction

Decrease in policy errors and omissions exposure

3.2x

ROI

Average return on implementation investment within 24 months

Measuring success goes beyond on-time, on-budget delivery. Establish baseline metrics before implementation and track improvements in improvements in operational efficiency, customer satisfaction, and business outcomes after go-live.

Regular post-implementation reviews help identify opportunities for continuous improvement and build support for future enhancement projects.

Key Takeaways for Project Success



Comprehensive Planning

Invest time in thorough scoping, stakeholder identification, and clear success metrics before technical implementation begins



Data Quality Focus

Prioritize data mapping, mapping, cleansing, and validation to prevent downstream issues that impact user adoption and client service



Change Management

Address both technical and human aspects of the transition with comprehensive training, communication, and support mechanisms



Workflow Optimization

Leverage Epic capabilities to transform transform operations rather than simply digitizing existing processes

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