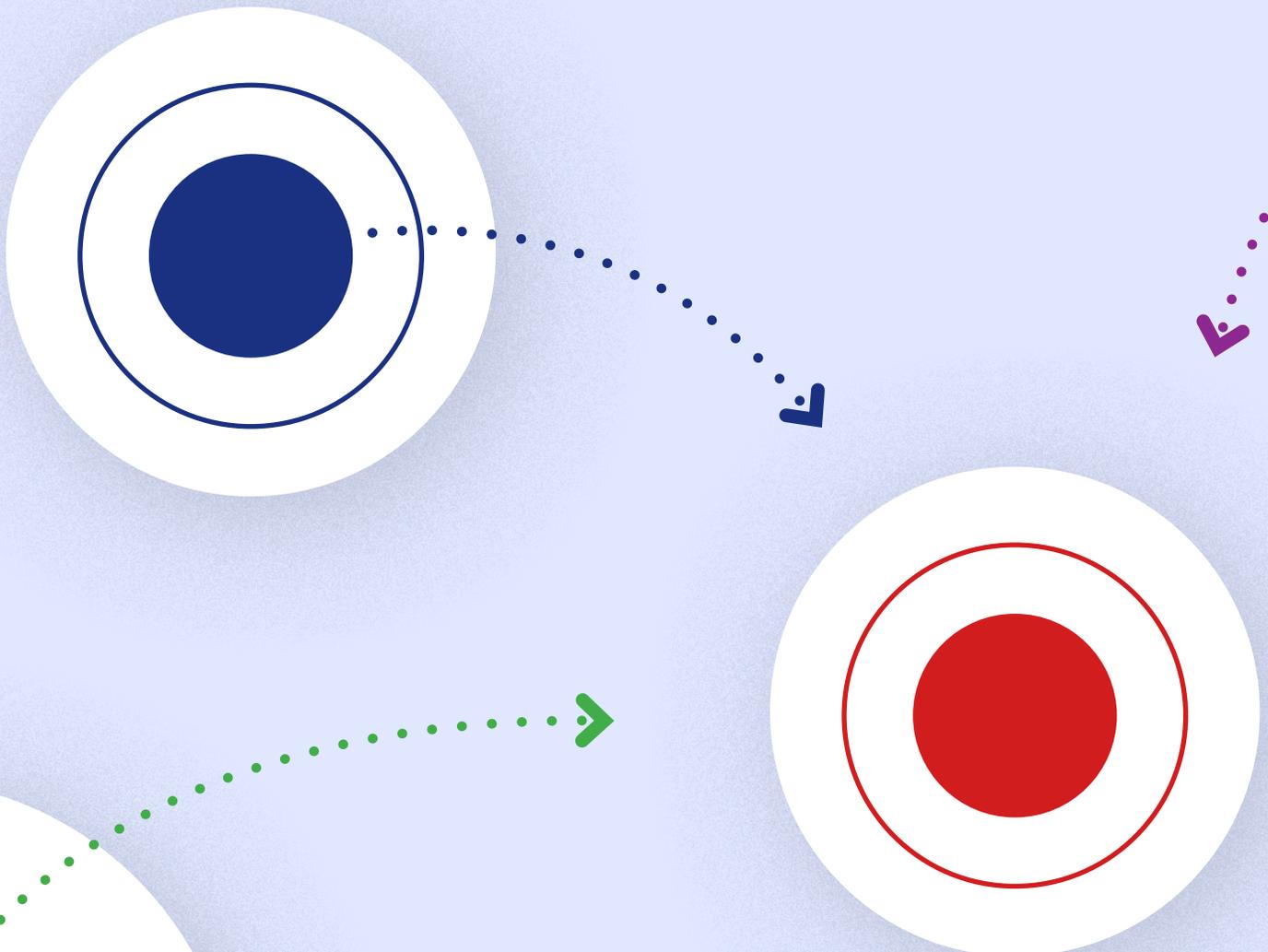


# Migrating From Applied TAM To Applied Epic

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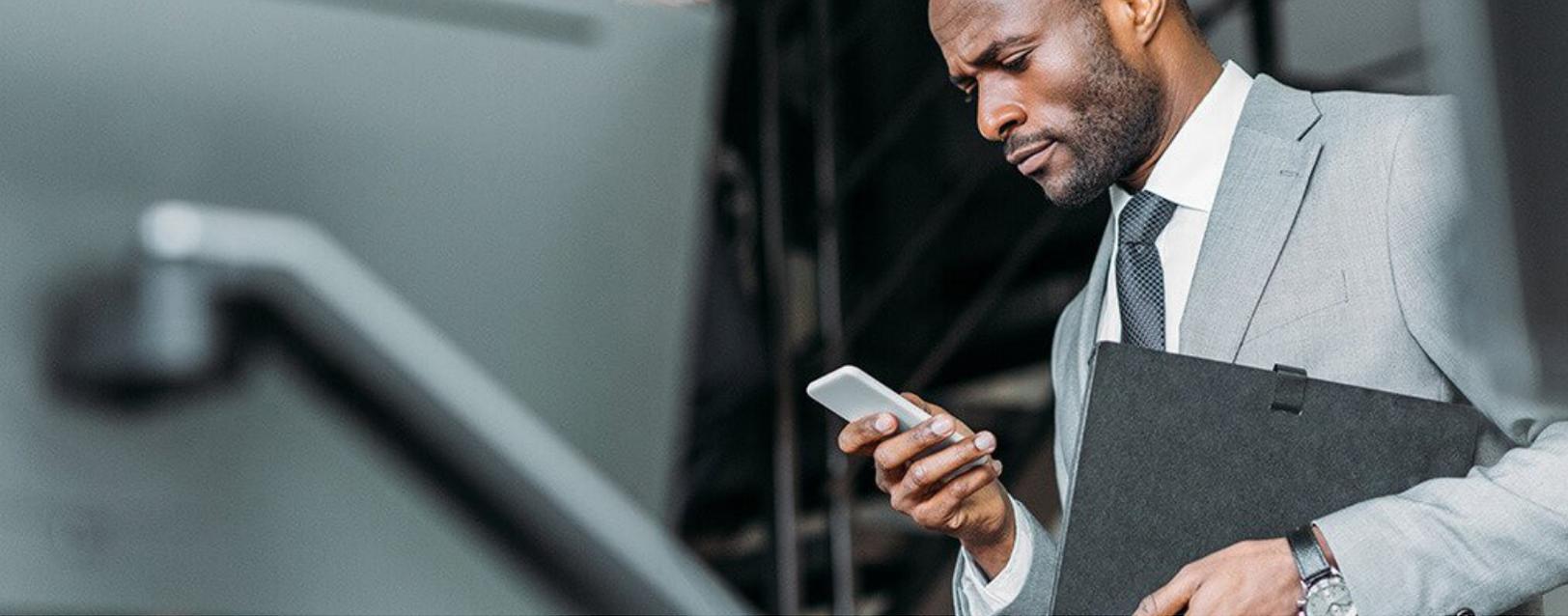
What You Need to Know For a Successful Transition



# Table of Contents

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<b>Introduction</b>	<b>03</b>
<b>Why Migrate From TAM to Applied Epic?</b>	<b>05</b>
Sharing with employees what relocation means for them	
<b>The Planning Phase</b>	<b>06</b>
<b>Proper Training</b>	<b>07</b>
<b>Determine Your Gaps</b>	<b>09</b>
<b>Track Better Opportunities</b>	<b>11</b>
<b>The Implementation Process</b>	<b>13</b>
Clean Up Accounting In Applied TAM	
Verify Declaration Page Setting For Policy Type Codes	
Avoid Creating “Hidden Applications”	
Enable Location Validation In Applied TAM	
<b>What Happens Each Week During a Typical Migration</b>	<b>15</b>
Weeks 1–10	
Weeks 11–20	
Weeks 21–26	
Activation & Beyond	
<b>Use Extra Time to Bring In More Business</b>	<b>17</b>
<b>Ready to Take The Plunge and Move to Applied Epic?</b>	<b>18</b>



Change is hard, especially when it comes to migrating from Applied TAM to Applied Epic. With that said, change can be worth the time and effort when the result is streamlined operations, reduced liability risk, and more profitable client servicing.

Many paths bring agencies to the realization that they have outgrown their Agency Management System (AMS). For instance, your business may realize that it can no longer trust your reporting. Or, your business struggles with the manual effort needed and time wasted communicating to your Applied TAM system about what you need it to do. Thus, you start looking to Applied Epic to eliminate the need for workarounds and patches. You want to push the lever and dynamite your whole workflow.

Migrating to Applied Epic is a major undertaking for businesses. It will take hard work to make it a success. Therefore, engaging a trusted technology partner, like Alexant, can make a crucial difference, helping streamline the process and train your people. The dedication and effort will pay off once your Applied Epic system is optimized and humming along.

Though change can be difficult, the benefits of migrating to Applied Epic are immense:

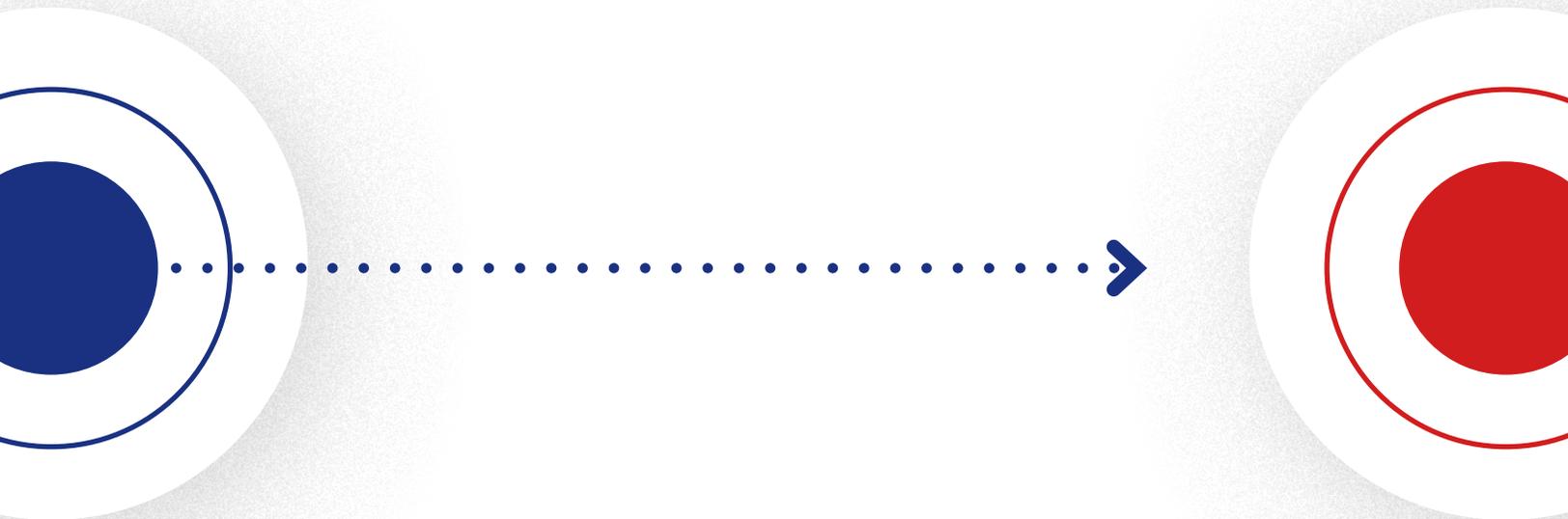
- » Lower E&O exposure
- » Easier, more intuitive system navigation
- » Improved reporting
- » Streamlined client servicing
- » More effective cross-selling

Agencies that switch appreciate the reduced E&O liability that comes from migrating to Applied Epic. Since all changes and updates to policies are stored in the cloud, you will always know when data changes, as well as who changed it—preventing problems from festering in the background.

Your employees will love the easier navigation that comes with Applied Epic. All client data and policy information are immediately available, within a click or two. Client servicing is streamlined, with many tasks, like emails, working automatically in the background.

Improved, and actionable, reporting from Applied Epic will help you stay on top of issues before they develop into crises. You'll never drop the ball on client issues; employee communication is a breeze as all activities and changes show up in one place. Activities that remain open automatically have follow up dates so nothing falls by the wayside.

What's more? Cross-selling opportunities are increased with Applied Epic. Your employees will always have the complete picture of your clients and prospects' needs right in front of them. Applied Epic will help you reach the low-hanging fruit you're not seeing with Applied TAM.





## Why Migrate From Applied TAM To Applied Epic?

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When your agency reaches a certain size, you run up against the limits of Applied TAM. Sticking with Applied TAM beyond this point can cause stagnation and reduced ROI for your agency.

With Applied TAM, much time is wasted manually tracking processes, ensuring that client and policy data remain valid. Applied Epic is self-documenting. Every change is recorded, saving you time spent on manual work that you can instead spend on growing your agency.

Applied Epic is built with better sales and improved client retention in mind. Simplified, yet more robust, reporting help you track opportunities with leads and existing clients, yielding new sales.

Applied Epic incorporates text messaging and easy email functionality to reach customers and prospects when and how they want. In the end, Applied Epic is the AMS for growth in the next decade and beyond.

# The Planning Phase

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The planning stage of your migration to Applied Epic is the keystone of the process. Any shortcuts or missteps here will come back to haunt you once you go live on your new system.

A common mistake that many businesses make is relying on the vendor to help with all aspects of migration. Instead, you need a partner in your migration. Alexant will guide you, not just during the sales phase, but throughout the planning, implementation, and servicing timelines.

During migration, data integrity is key. Before, during, and after your switch to Applied Epic, you will need to cultivate in your employees the habit of updating existing data, or adding missing data. Alexant helps businesses with this arduous task; guiding your employees through the training process.

Anything that can be done to foster employee “buy-in” will pay huge dividends later. Dividing conversion responsibility by skill strengths and time commitments will help. Don’t burn out one employee early on in the process.

If managers and principals can share the load, it keeps employees invested. Have management get their hands dirty throughout the process; it will set a good example, and help move the migration along.

Transition from Applied TAM to Applied Epic may take a few months to one year or more, depending on your business size.



# Proper Training

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Once you decide to migrate from Applied TAM to Applied Epic, choosing your technology partner is the biggest decision you'll face.

Alexant knows from more than 25 years experience that quality employee training during migration is the key to a successful transition. Time plus effort equals quality. In other words, you will get out what you put in.

Use a partner like Alexant to optimize your employee migration training. Help your employees buy-in to the new system, with expert training, including:

- » Data conversion review
- » Web based and onsite training
- » Practice in demo data
- » Workflow optimization
- » System configuration

Your employees will make or break the switch to Applied Epic. Giving them stellar training, and a partner they can rely on is critical. It helps your employees grasp what is needed, see the gains in efficiency, and get through the friction of conversion.





With the right preparation, your employees will be excited about Applied Epic, and look forward to how much easier their daily work will be. Alexant will help them see that the work that goes into conversion is worthwhile, with benefits outweighing the effort.

When they have this confidence, they'll adhere to your changes in protocol, and embrace the future that Applied Epic ushers in. This helps you and your bottom line.

You're not just entering into a transaction; migrating to Applied Epic requires a partner who will be with you every step of the way. When you're looking for a consulting partner to walk you through your migration, ask yourself:

- » Do they have insurance industry experience?
- » Do they have expertise with both Applied TAM and Applied Epic?
- » Do they have reasonable fees? Sometimes you really do get what you pay for, but many IT consultants aim high with their pricing.

Alexant has been helping agencies of all sizes with every aspect of their management systems for 25 years. Senior consultant Sue Good brings 35 years of insurance consulting to the table. She knows what you need to know, and can help you get what you need out of Applied Epic.

# Determine Your Gaps

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When migrating from Applied TAM to Applied Epic, you want to make sure that your employees not only use Applied Epic to your best advantage, but you will also need to nip any negative habits in the bud. Applied Epic offers a host of useful tools to help you keep your employees compliant.

Data integrity is the constant theme not only of migrating to Applied Epic, but also for getting the most out of it. After the initial phase of migration is over, when employees may be tempted to start taking shortcuts, you'll appreciate the power of Applied Epic's reporting options.

Applied Epic's robust reporting tools allow for reporting in multiple areas:

- » Reporting to help employees stay accountable to themselves, and
- » Reporting to show management when inefficiencies or failures occur





Quick reports allow employees to self-audit their work and their interactions with your Applied Epic system. You can set up reports for anything you need to be sure is done right. Any task, activity, or process supports quick reports.

Unlike Applied TAM's multi-step process to see what has happened on a policy, Applied Epic's Service Summary Row gives you a relevant, actionable status at a glance. Applied Epic also generates useful activities that can streamline the filing and retrieval of key documents and data.

Applied Epic's activity reports show where users are struggling to move through your established processes. They also highlight steps that are being missed in your workflows. Beyond that, activity reports will demonstrate which employees would benefit from additional training, which can reduce overhead costs.

# Track Better Opportunities

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Once the hard work has been done, your business is now about to reap the rewards of migrating to Applied Epic. You don't just want a more robust system, you want more sales and greater efficiencies. Moving from Applied TAM to Applied Epic gives you the ability to do just that.

If you've checked out reviews of Applied Epic, you know that agents and agencies have boasted about the benefits of switching. Agencies are finding Applied Epic is more comprehensive, and easier to use. We'll touch on a few details in three key areas:

- » Sales
- » Service
- » Streamlined operations

Growing sales is a huge benefit of migrating to Applied Epic. Having all client and prospect information organized in one easily accessible place makes cross-selling or upselling simple. When you have a complete holistic view of every client and all lines of business, you're able to improve sales.



Applied Epic's support for text messaging and the ability to track cold leads through the sales process can yield better sales. Applied Epic's granular parsing of your data will help you see where each client is in the sales journey, as well as the monetary influence of each and every client.

Sales are great, but keeping existing clients on the books is a huge part of maintaining a profitable business. Moving to Applied Epic offers dozens of improvements in client service. You will be able to quickly respond to customer inquiries by email, attaching documentation from within Applied Epic.

Managers and principals will rest easy, knowing that reports can be scheduled for distribution; you will no longer have to manually download everything you need. You won't need multiple codes for employee roles; in Applied Epic everything is tracked by one employee code. Activities are tagged and tracked across the platform, simplifying reporting and review.

The streamlined servicing and record keeping is hugely beneficial to businesses. E&O issues will diminish with the openness of the system; every action taken by an employee, and changes to policies, are date and time stamped.



# The Implementation Process

Implementing Applied Epic AMS is where the nitty gritty of data conversion happens. There's no perfect data conversion. Even with comprehensive preparation, you'll likely have some post-conversion repair work.

Commitment to the process, and determination to stay the course, will reduce post-conversion work. Save time, and your sanity, by taking a few key steps prior to conversion.



## **CLEAN UP ACCOUNTING IN APPLIED TAM**

Accounting doesn't convert with migration to Applied Epic, so it's vital to get a handle on this prior to conversion.

Alexant stands above the competition here as this is one of our core areas of expertise.

We help guide you as you configure your new system's workflows and with mapping out your financials. With that in mind, we'll help you completely customize your frontend financial workflows to ensure the backend operates smoothly and you've got clean, reliable financial data when you get into Applied Epic.



## **VERIFY DECLARATION PAGE SETTING FOR POLICY TYPE CODES**

Improper configuration of the Declaration page setting can cause problems during conversion. Errors can include:

- » Package policy type codes not correct in Applied Epic, or
- » Lines of business identified as package headers in Applied Epic when they shouldn't be

Check and update existing Declaration page fields. For any policy type codes that represent commercial package headers, the Declaration page must indicate "Application." For any policy type code for personal package headers, the Declaration page must indicate "none."

Any commercial policy types that use non-ACORD forms must also indicate "none" on the Declaration page, rather than "Application."



### **AVOID CREATING “HIDDEN APPLICATIONS”**

These are applications which have been added to a policy, but do not have a billing screen created. A complete list of hidden applications will be given to you when your first sample conversion is complete.

You can start cleaning these up before the process gets started to reduce potential issues later. For any known hidden applications, simply:

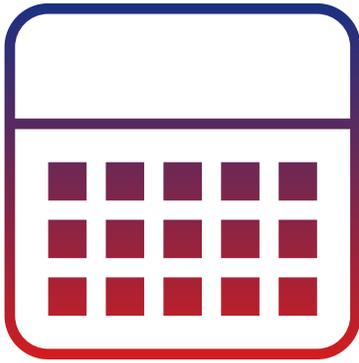
- » Add a Risk under the billing screen for the existing policy
- » Select the appropriate policy type for the hidden application
- » Fill in any additional information
- » Save



### **ENABLE LOCATION VALIDATION IN TAM**

Applied Epic requires that all locations be listed on the ACORD 125 commercial application. By turning Applied TAM’s Location Validation on, you’ll get everyone in sync, and in the habit of listing all locations.

Enabling Location Validation may cause a torrent of employee complaints at first, but it will save you a ton of time after you go live on Applied Epic.



## What Happens Each Week During a Typical Migration

Generally speaking, a timeline for an average-sized agency will take around 26 weeks and achieve the following milestones:

### WEEKS 1–10

During the first ten weeks, you can expect to begin immersing your employees in the new Applied Epic system:

- » Agency/Brokerage implementation team begins using Applied University
- » Send source data
- » Decide on data filter options

### WEEKS 11–20

During the next ten weeks, your implementation team will dig deeper into the migration, while your employees begin exploring and getting comfortable with Applied Epic.

This includes the crucial task of defining your agency's workflows and activity philosophies.



During these ten weeks, Alexant works hand in hand with your implementation team so they have a firm grasp on what to expect with Applied Epic. Together, you'll not only build your workflows, but you'll optimize them while ensuring your employees are ready with a variety of training tools:

- » All staff begin using Applied University training
- » Staff review sample conversion data
- » Data mapping is completed
- » Data conversion scope is identified
- » Implementation team validates and optimizes new Applied Epic workflows

### **WEEKS 21–26**

The final five weeks before going live will bring your employees further out into the water of Applied Epic migration:

- » All staff continues Applied University training
- » Implementation team signs off on a conversion dry run
- » System configuration is completed
- » All staff practices new workflows
- » Staff begins private trainings

### **ACTIVATION AND BEYOND**

After all staff are trained, your business is ready to press “go.” The download begins, and staff may begin using the new Applied Epic system. With that said, all staff will continue to receive post-activation private training to ensure they're comfortable and making the most of the new system.

# Use Extra Time To Bring In More Business

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You're migrating from Applied TAM to Applied Epic not just to better organize data and streamline processes, but to grow your business. Get the most out of it by keeping your employees up to date on all that Applied Epic can do.

Applied Epic is more automated than Applied TAM, but it's more structured, too. It can take a few rounds of employee training to know all the ins and outs of the system. The better everyone knows the system, the better the monetary reward you can reap from it.

As everyone learns to excel with the system, the inherent benefits of Applied Epic will free up more time for everyone. This is time that can be spent growing your profitability.

Follow up more effectively, and in less time with existing clients. Applied Epic's "light touch" attachment and email functionality lets your service staff keep existing customers happy. With Applied Epic, your employees give more personal attention, but in less time, leading to better retention.

Applied Epic will let you spend more time prospecting for new business with your time savings. Tracking cold leads, identifying cross-selling opportunities, and using 21st century communications like text messaging will bring higher sales.

Migrating from Applied TAM to Applied Epic will free your people from the drudgery and inefficiency of making-do and patching together a system you've outgrown. Put the focus back on selling with your new AMS.



# Ready To Take The Plunge And Move To Applied Epic?

Switching from one agency management system to another can be a huge disruption to your insurance operation. It can also be very expensive and time consuming. Don't rely only on the software vendor to get you through migration.

Instead, choose a partner like Alexant. An expert in the insurance industry, Alexant is a leader in IT solutions for insurance agencies who will be with you every step of the way.

If you know you need to move in a new direction, reach out to Sue Good at Alexant. During a free 30 minute consultation, Sue will use her 35 years of experience to walk you through all that Alexant can do to make your Applied Epic migration a success.

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