

Epic Change Management: 5 Tips for a Successful Move to Applied Epic



Before you make the move from Applied TAM[®] to Applied Epic[®], it's essential to have a clear plan in place.

As a leader, it's your responsibility to pave the way for the rest of your team. We have outlined a few key activities to help ensure your success during this change.

1. Build your core implementation team

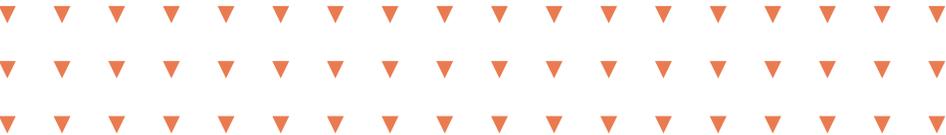
The first step we recommend is creating a dedicated team responsible for managing the implementation within your organization. These internal champions will advocate for this change among the rest of your staff. Change may be hard for some of your users, so having people onboard will help others in your agency be more optimistic about the road ahead.

Your team will work directly with the Applied implementation team to coordinate data review, roll out your organization’s training plan, and more. Make sure each department is represented on your team and can participate in discussions and decisions. Clearly define goals, processes, and each person’s role up front. Then, set up recurring meetings to see how you’re tracking and field any potential obstacles. Continue implementation team meetings after activation to ensure you get the most out of your new investment.

2. Communicate with your staff

You need to start communicating as soon as possible with your staff the “who,” “what,” “why,” “when,” and “how.” First, let them know who is on your implementation team and each person’s role so they know whom to contact with questions. Change can seem overwhelming, so it’s important to communicate what staff can expect during this process to help ease their fears. Drive excitement by telling staff how Applied Epic will make their jobs easier (what’s in it for them). For instance, integrated Personal Lines and Commercial Lines quoting reduces redundant data entry and makes for more efficient quoting with insurers directly in your management system so you can make sure your customers get the best products at the right price – all with fewer clicks.

You also want to explain why your organization is changing management systems in the first place. Employees need to understand how your current management system is no longer



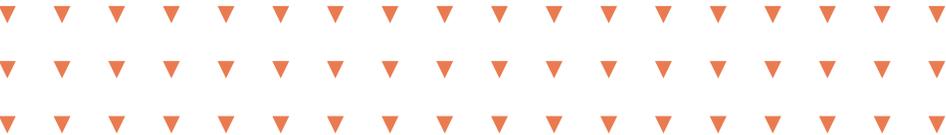
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meeting your agency’s needs and buy into the necessity to improve it. Next, you’ll want to communicate the timeline for when the migration will be complete and when they can access Applied Epic. Lastly and perhaps most importantly, training. Review how staff will learn how to use the new system.

Remember, communication isn’t one way. Encourage feedback from your core team on what is and isn’t working. No change program goes entirely as planned. But having open and continuous dialogue throughout this process will help you identify challenges early on and make the necessary adjustments.

3. Allow time for implementation-related tasks and training

One of the biggest fears about changing management systems is how staff will find time to learn and implement a new system while already carrying a heavy workload. Set aside time each week for your core team to complete implementation-related tasks to ensure you stay on track for your go-live date. Training is a crucial element to a successful migration. If you ask an agency that successfully migrated to Applied Epic the key to their success, most will say their staff put in the work to prepare. Their staff invested in the self-paced learning available and therefore embraced change. Give your staff the time they need to complete the necessary training so that you’ll be ready when it comes time to go live. The more you know, the more you can achieve.



4. Incentivize staff and hold them accountable

Incentives are a great way to encourage employees to complete their training. Hold “lunch and learns,” where staff can review what they’ve learned in training and ask questions while enjoying lunch on you. Track staff’s progress in completing their training and hold each person accountable for their part in the agency’s success.

5. Create excitement in the office

It’s your responsibility to stir up buzz and excitement among your team about switching management systems. Agencies that have successfully migrated to Applied Epic agree that this is an important step. Caroline Sherk, COO at Verge Insurance Group, said, “Make the staff excited about the move. Help them understand that you’re doing this for the future of the business and ease of doing business moving forward.”

To drum up excitement, host a launch party where you educate staff on what’s to come and celebrate your first step in the implementation process. You can even create a theme for your implementation and hold events that go with your theme. Make it fun! Break your staff into teams for a friendly competition to see which team can complete their training first. Keep them engaged with quizzes that test their knowledge of Applied Epic.

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