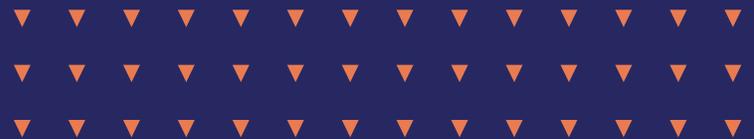




Insider Secrets for a Successful Migration to a New Management System



There comes a time in every brokerage when technology needs to be replaced, whether it's to streamline workflows, create a better customer experience, or make the brokerage more profitable. This process can be overwhelming, especially for the staff responsible for making it happen. And as the saying goes, "The best-laid plans of mice and men often go awry."



We asked Brian Bartosh, President of Top O’Michigan Insurance and long-time Applied TAM[®] user who recently moved to Applied Epic[®], for insider secrets on what to do (and not do) during and after the migration process.

Don’t compare your new management system to Applied TAM

You have to think of upgrading your management system as an opportunity. Ask yourself, “What can we do with new technology to enhance client relationships?” We compiled a list of everything we were doing today, what our clients received, and the reports we generated. We also looked into potential hardware requirements, cloud services, etc.

Fortunately, Applied had solutions for our questions, and we insisted on seeing everything — not just the sales pitch. We had to ensure we continued the same functions within our brokerage, but not in the same way. That’s an expectation I want to share with brokers. Applied Epic is not an enhancement to TAM[®]. It’s a brand-new system, and you need to look at it from that point of view.

When revising existing workflows, understand those tasks completely because you won’t be doing them like you did in TAM — you’ll look for a more efficient way to do things. Holding on to old workflows will slow you down, and everyone has to go in with an open mind. What we did with our team was to make sure they saw fantastic time-saving opportunities. Instead of pitching it, “Hey, can I add 10 more tasks to your day?” we said, “What tasks can we remove using a new management system?” And that’s also the approach we took in the training process before we even went live: to look for ways to eliminate low-value tasks.

Finally, remember that TAM and Applied Epic are entirely different programs, so they don’t have a direct one-to-one data alignment. The way we tracked our contacts in TAM is slightly different than the expanded abilities that are in Applied Epic. So again, the less baggage we brought over, the easier it was to dive in.



You don't need as much historical data as you think

The misstep we took at first was trying to go back too far to bring data forward. We realized we were trying to look through the front windshield, not the rearview mirror.

At first, we decided to bring 10 years forward and then five years. When it came down to it, through a lot of careful evaluation, our team decided we were okay if we only got one or two years of data transferred. Transactions that come over do so for a good reason; we could take advantage of more of the automation and experiences in Applied Epic because we didn't have all this baggage to carry forward.

You don't need to carry loads of data forward because you will have access to old information on a read-only basis that you can always go back to if necessary. We cut TAM access to our users almost immediately so they could get into the habit of doing things the new way. However, they did have limited access to old data, allowing them to cross-check things or get something that may not have come forward.

Think of moving from your home and having a garage sale. You know you'll let stuff go and move forward with clean, crisp data that allows you to use some of the other tools built into your new management system for automated workflows, events, marketing, and all the different aspects you will have.

Involve staff every step of the way

Just before our go-live, we underwent intensive training and had meetings several times a week. Then, when we decided to go live, we met at the beginning of each day to share what was taken care of overnight. Then, we had wrap-up meetings at the end of each day that were 15-30 minutes long. Everyone was involved and shared questions and feedback. And I think that's an integral part of the process.



INSIDER SECRETS FOR A SUCCESSFUL MIGRATION TO A NEW MANAGEMENT SYSTEM

A valuable lesson we learned is to take more time than you expect and worry about your team losing interest. You want to keep them excited and motivated. You want to ensure everyone is involved so they personally take ownership of the migration project. As a leader, you've got to be committed to communicating with all staff so their concerns, comments, and opinions are taken seriously instead of rushing through the process.

There will be pain points for everyone. Tackle them head-on and try not to skate any issues. Always encourage your staff to ask questions, like why you decided to do this. Allow an open environment and have those difficult conversations because you need to know immediately if things aren't going to plan.

Get comfortable with your daily tasks first

If we were to do it over again, we'd drill down a bit deeper on daily tasks. We went through all our workflows and trained on them extensively. But when clients called and wanted to know how to issue a pink card, we didn't know where to start. We needed to isolate tasks we do regularly and ensure we were comfortable performing those tasks. We did quick readjustments and training focusing on those areas and got back on track quickly. But if we could do it differently, it would have been to drill down on those daily tasks that will frustrate everybody, like a policy change or a billing inquiry.

Whether it's a claim being filed, a change being initiated, or issuing a certificate, there's a process built in that we didn't have in TAM. That was a significant change for us, but it paid off because Applied Epic automates a lot of follow-ups with our clients without us having to intervene, and we're taking advantage of that enhanced technology.



Implement all your new technology together

If you implement each of your new solutions individually, you have to go back and change some of your earlier implementations to make them work together. Ripping the bandage off allowed us to see those products all at once. Because we did that, we knew how well our renewal manager fit with Indio® and other integrations.

We don't have as much change to worry about in the future, which is good because when you take that approach over several years, you will constantly come back and change other things. And that means you're managing more and more change. Now, we have staff that know this system is in place, and they feel like it's been here all along, yet that's not true. They feel comfortable in these environments and with the terminology.

Final thoughts

You're set for the future when you've got the right technology and products. Upgrading management systems has been a great decision. I would not look back; I don't think any of our team would either. When we asked if they would ever want to return to the old way, they all said no, this is where they want to be, and we all like where we're at.

Check out this webinar series for more insider secrets from Top O'Michigan Insurance.

