



Applied Epic® ASCnet

How to Prepare for Epic®

Strictly Confidential

Objectives



- Change Management
- Preparing for a Successful Conversion

Strictly Confidential

Change Management



- Current State and Desired / Future State
- Components of Successful Change Management
- Change Equation
- Champions and Challengers

Current Vs. Future/Desired State



Where are we now?

- Set goals and prioritize
- What needs are not met in our current state?

Where do we want to be?

- Resolve problems
- Make easier

Components of Successful Change Management



Preparation and Planning

Where is the dissatisfaction?

Who are the stakeholders?

What projects need to happen?

Assign roles

Create a timeline



6

Source: Confidential

Components of Successful Change Management



Communication and Participation

Communicate to Stakeholders

Set a standard for regular communication

2 way communication



7

Source: Confidential

Components of Successful Change Management



Education and Training

Use all training options available

Frequent, using varying methods

Track and monitor



8

Source: Confidential

Components of Successful Change Management



Control and Execution

Identify problems or roadblocks

Assign mentors

Additional or ongoing training

Be flexible



9

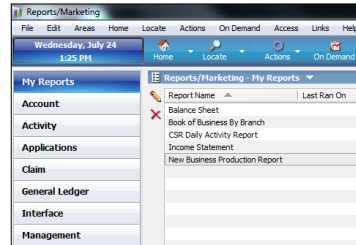
Source: Confidential

Components of Successful Change Management



Measurement

Measurements needed will
be determined by goals set
Reporting



Change Equation



$$C = D + V + F > R$$

C = Change

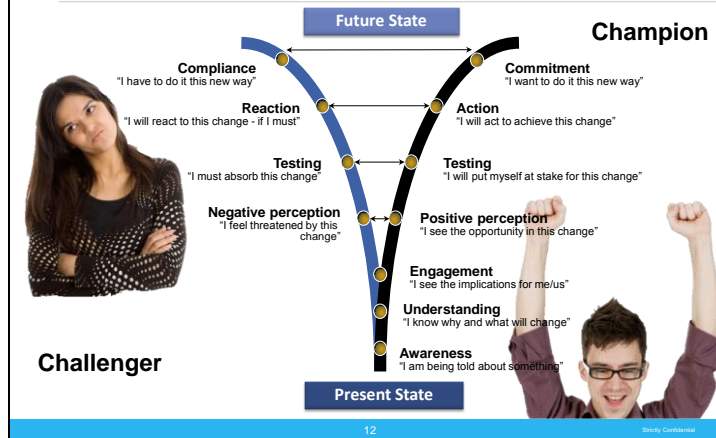
D = Dissatisfaction

V = Vision

F = First Steps

R = Resistance

Champions and Challengers



Preparing for a Successful Conversion



- Conversion Process
- Configuration Decisions
- Training
- Suggestions for a Successful Journey

Conversion Process



- **Confirm Hardware/Software Compatibility**
- **Provide Data to Applied Systems**
- **Begin Training Via Applied University**
- **Sample 1 Delivered For Review**
- **Return Change Request Form**
- **Old/New Lists**
- **Identify Data Clean Up**
- ****Additional Samples as Needed****
- **Prepare for Accounting Transition**
- **Activation**

Configuration Decisions



- **Structure**
 - Agencies, branches, departments, profit centers
 - Separate financials for agencies
 - Reporting segmentation
 - Security restriction options

Configuration Decisions



- **Activity Events, Codes and Tasks**

- How are they currently used?
- Event activities vs. manual
- Tasks
- Reporting

Configuration Decisions



- **Line Statuses**

- Understand how policies work in Epic
- Are more statuses needed?
- Are fewer statuses needed?
- What do you need to report on and why?

Configuration Decisions



- **Commission Agreements**

- Producer and Company
- Based on policy type, line status, bill mode (agency/direct), issuing state and dates
- How are you currently paying producers?

Configuration Decisions



- **Security**

- Security groups
- What do they need access to?
- What do you not want them to have access to?

Training



- **Applied University**
 - Live Sessions
 - Recorded Sessions
 - Interactive Tutorials
- **Epic® Product Instructors**
- **Sample database**

Suggestions for a Successful Journey



- **Prepare!**
- **Thoroughly review your data**
- **Train! Train! Train!**
- **Take advantage of pre-entry to save time at activation**
- **Expect a learning curve**

Review



- **Change Management**
- **Preparing for a Successful Conversion**

Additional Resources



- **Other sessions**
- **Webinars**
- **Interactive tutorials**
- **Applied University classes**