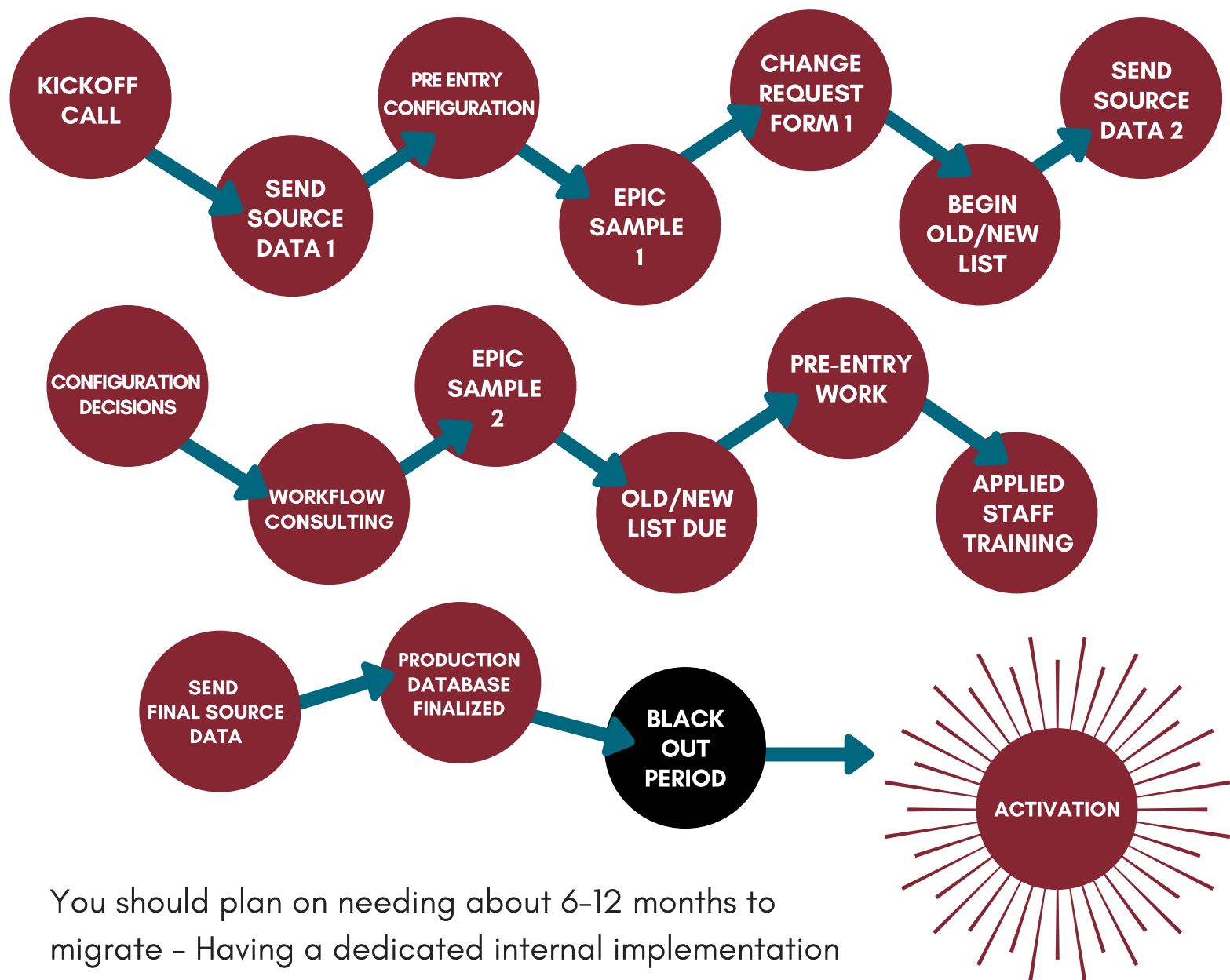




PREPARING FOR YOUR APPLIED EPIC CONVERSION

THE CONVERSION PROCESS



You should plan on needing about 6-12 months to migrate - Having a dedicated internal implementation team can significantly improve the migration time.

PREPARATION & DATA CLEAN UP



Purge and merge:

- Company codes
- Policy codes
- Activity and transaction codes
- Brokers/Employees/Vendors/Finance Companies
- Phone numbers and contacts

Close:

- Open activities
- Open binders
- Open claims

TIPS FOR SUCCESS

- ✓ Have a dedicated internal team and management support.
- ✓ Thoroughly review all Sample Data.
- ✓ Test Source Data in Epic to ensure that it works.
- ✓ Understand and leverage Configure to ensure that it works for your agency.
- ✓ Build your Internal Implementation Team wisely with representatives from each department.
- ✓ Maintain clear communication with your Applied Implementation Team and adhere to all project due dates.
- ✓ Allow extra time for assigned tasks as they will usually take longer than anticipated.
- ✓ Prepare your staff for the major changes to come.
- ✓ Provide additional training opportunities before, during, and after conversion.



"Change is inevitable and not always controllable. What can be controlled is how you manage, react to, and work through the change process."

- Kelly A. Morgan