

# GETTING STARTED WITH AN APPLIED EPIC SERVICING OPTIMIZATION



Applied Epic is a powerful, flexible platform. But without intentional optimization, many agencies aren't using Epic to its full potential. This checklist highlights high-level opportunities to optimize servicing workflows, configuration, data and reports, and integrations to help you streamline operations and support smarter, data-driven decisions.

## WORKFLOWS

### STANDARDIZATION



Is everyone using Applied Epic the same way? (Why?)

### EFFICIENCY



Are you using Applied Epic's features to do the work for you?

### DOCUMENTATION



Is every client interaction noted and attached in Epic?

### INFORMATION RETRIEVAL



Can you access information quickly?

### SET EXPECTATIONS



Are your workflows documented?

## CONFIGURATION

### UNADDRESSED UPDATES



Are you using the most recent features, dashboards, and other tools released for Applied Epic?  
Do you have any "@" activity codes?

### ACTIVITIES & EVENTS



Do activity codes have default fields for Who/Owners, Open/Closed, Successful/Unsuccessful fields?  
Are activity descriptions pulling in Epic variables, such as policy type or effective date?  
Are all system events generating an activity?

### INTERFACE (DOWNLOAD)



Is your interface (download) running smoothly?

## DATA & REPORTS

### ACCOUNTABILITY



Are users held accountable?

### REPORTS & DASHBOARDS



Do your reports and dashboards provide accurate agency data?

### CLEANING



Are you running regularly scheduled reports to identify data errors?

## INTEGRATIONS

### EPIC BRIDGE



Do your agency users take advantage of the Epic Bridge and email templates for consistent communication?

### AI Tools



Are you able to use AI tools to level up outside of Applied Epic?

Get expert optimization guidance by working with Applied Epic Agency Consulting team at Kite Technology.

Contact Kite Technology today!