



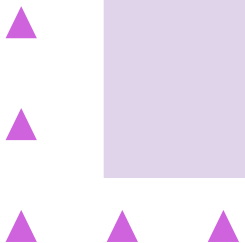
An Accelerated Implementation to Support Your Brokerage

The Applied Epic Digital Foundation

For customers who:

- Want to keep the momentum going
- Need minimal “homework” outside of implementation sessions
- Prefer a focused, collaborative approach

PLAN	DESCRIPTION
The Kick-Off	We'll meet with your implementation team to set expectations and plan your migration to Applied Epic. The kick-off will cover: <ul style="list-style-type: none">• Access to Applied University• First-time login to Applied Epic• Initial backup of Applied TAM data
Configuration	We'll assist you in cleaning up your Applied TAM data before the conversion process begins. The configuration process includes: <ul style="list-style-type: none">• Completing your configuration workbook• Attending a configuration review meeting• Holding an Accounting readiness meeting
Training	We'll meet with your implementation team to set expectations and plan your migration to Applied Epic. The kick-off will cover: <ul style="list-style-type: none">• Learning the essentials of Applied Epic• Virtual group training





PLAN	DESCRIPTION
Data Conversion	We securely back up your Applied TAM data and conduct additional analysis in preparation for Applied Epic activation
Activation	<p>It's showtime! Your team can sign in and start using Applied Epic in their daily workflows.</p> <p>We understand how important it is for everything to run smoothly, and we'll be available to troubleshoot and support you whenever you need it.</p>
Post-Activation Services	<p>After you're all set up, we're here to help with ongoing activities like:</p> <ul style="list-style-type: none">• Customized Training• Post-activation data clean up• Additional configuration (if required)• Escalated support to address all user and technical concerns

