

# Indio Handbook: Identifying Success

## Introduction

The content of this handbook is geared towards principals, management, and Indio admins to assist with driving successful adoption of Indio. By the end, you should have an idea of meaningful and measurable goals for successful Indio usage that reflect your organization’s “why” behind using Indio.

## Align Success in Indio with Your “Why”

Take a moment to reflect on you and your organization’s “why” behind using Applied solutions like Indio. Is it “to save time” or “win more business?” Your “why” could reflect formally defined “core values” with consideration for you and your staff’s personal and professional aspirations.

Whatever motivates your “why,” it’s important to keep those motives front of mind as you work to define what being successful with Indio means for all users, from management to staff. As Indio can benefit insured clients looking for digital avenues to do business with your company, you need to strategize around their success as well.

By aligning everyone’s success with “why” early on, you will ensure early training and workflow design efforts will provide maximum value and excitement for those effected by the Indio rollout. With success defined, you’ll also have an easier time of monitoring for successful adoption using metrics tools provided by Indio.

## “Whys” at All Levels

To assist with identifying what success with Indio means for your group, we’ve compiled some of the common “whys” our Indio experts have heard from users across various roles. We’ve also included links that highlight functionality and resources supporting success in those areas. This is not an extensive list but should help as you consider all users’ needs.

Agency Principals/Management	
Use Case	Applied Resource
Focus Account Managers’ time on revenue-generating activity over repetitive data entry.	<ul style="list-style-type: none"> <li>▪ <a href="#">Benefits of Indio Smart Mapping</a></li> </ul>
Empower new hires to work on new and renewal business quicker.	<ul style="list-style-type: none"> <li>▪ <a href="#">Getting Started for Agents</a></li> </ul>
Offer digital servicing as a value prop for current and prospective clients.	<ul style="list-style-type: none"> <li>▪ <a href="#">Customer Success Story</a></li> </ul>
Reduce E&O exposure inherent with outdated data gathering methods like email and redlined spreadsheets.	<ul style="list-style-type: none"> <li>▪ <a href="#">Send to Client from Indio</a></li> <li>▪ <a href="#">Send to Carrier from Indio</a></li> </ul>



Sales/Account Marketing	
Use Case	Applied Resource
Assist with capturing new business data.	<ul style="list-style-type: none"> <li>▪ <a href="#">Lead Capture Pages</a></li> </ul>
Provide secure, convenient access to gather renewal data which cannot easily be forwarded to a competitor.	<ul style="list-style-type: none"> <li>▪ <a href="#">Document Security</a></li> <li>▪ <a href="#">Hiding Submissions</a></li> </ul>
Access to carrier and Acord forms – over 35k and counting!	<ul style="list-style-type: none"> <li>▪ <a href="#">Form Library</a></li> <li>▪ <a href="#">Requesting New Forms</a></li> </ul>
Visibility of lesser-known markets with appetite for unique risks.	<ul style="list-style-type: none"> <li>▪ <a href="#">IVANS Market Appetite in Indio Submissions</a></li> </ul>

Servicing	
Use Case	Applied Resource
Less time spent on tedious data entry like prefilling applications.	<ul style="list-style-type: none"> <li>▪ <a href="#">How to Be More Efficient</a></li> </ul>
Faster and easier data pushback of collected data to Applied Epic.	<ul style="list-style-type: none"> <li>▪ <a href="#">Bi-Directional Integration with Applied Epic</a></li> </ul>
Create workbooks pre-filled from Epic for the Client's review	<ul style="list-style-type: none"> <li>▪ <a href="#">Import/Export Schedule Workbook Data</a></li> </ul>
e-Signature capabilities.	<ul style="list-style-type: none"> <li>▪ <a href="#">How to Use E-Signature</a></li> </ul>

Insured Client	
Use Case	Applied Resource
A modern user interface and experience aligned with other industries.	<ul style="list-style-type: none"> <li>▪ <a href="#">Insured Resource Hub</a></li> </ul>
A secure, no-password sign on experience when engaging with company online.	<ul style="list-style-type: none"> <li>▪ <a href="#">Logging in as an Insured Client</a></li> <li>▪ <a href="#">Integration with CSR24 Portal</a></li> </ul>
Reduced repetitive data entry, both during new and renewal risk review.	<ul style="list-style-type: none"> <li>▪ <a href="#">Insured Information Smart Mapping</a></li> </ul>
Ability to manage a complex renewal review with access for several stakeholders.	<ul style="list-style-type: none"> <li>▪ <a href="#">Client Contact Permissions</a></li> </ul>

## In Conclusion

Whether it's Indio or one of Applied's other solutions, it's important to keep your "why" front of mind as you develop your Indio rollout plan so that you get the most value from your investment early on and throughout your partnership with Applied. We've provided some ideas to help start the conversation but remember that Indio is a digital tool whose value is derived from the purpose you provide it.

## Adoption Services and Continuing Education

Here in Adoption Services, we are focused on customers successful use of the Applied solution portfolio. We combine industry expertise with product knowledge to help organizations like yours maximize the value of their partnership with Applied.

We recommend these resources to help strengthen your proficiency with Indio and Applied's other solutions:

- [What's New from Indio](#)
- [Indio Office Hours](#)
- [Additional Indio Success Handbooks](#)
- [Applied Customer Success Hub](#)

If you'd like to talk through your "why(s)" and supporting resources, please email us at:

[customersuccess@appliedsystems.com](mailto:customersuccess@appliedsystems.com)