Migration Services

Overview of Services for the TAM to Vision Migration Process

Sales Services

Business Needs Analysis
An Applied Client Relationship Manager will work with your agency to determine the business need for migration, as well as assist in the development of a high level process timeline. The differences between TAM and Vision will also be highlighted.

Applied Consulting Services

Readiness & Planning
Applied Consulting Services will review current business operations and functions, as well as future business outcomes/strategic business objectives.

Data Validation & Normalization - Virtual Consultation Session(s)
In an effort to prepare your data for a smooth and clean transition, a Data Validation & Normalization session offers step-by-step migration assistance. Your consultant will perform a comprehensive data review and provide various clean-up and normalization recommendations. A pre-migration integrity report is provided with suggested workflows for manual clean up efforts. Coordinated with the arrival of the sample migration(s), your consultant will assist with the data review and provide additional data integrity clean up strategies.

Accounting & Structure
Applied Consulting Services will evaluate your current general ledger and agency structure. During the evaluation process, your agency and consultant will examine Vision’s expanded accounting and agency structure feature and functionality.
Remote Workflow Consulting Session
Applied Consulting Services will review existing TAM workflows and make necessary recommendation for updating/transitioning into the Vision product.

Project Management Services
Project Manager
A dedicated project manager will be assigned to your agency to ensure proper expectations are established and maintained. An individualized migration project plan is created, including project goals and objectives, specified tasks, resource allocations and timelines for completion. Your project manager will serve as the primary coordinator of all applicable service needs, as well as work closely with applicable ASI departments. Comprehensive progress reports and/or conference calls are provided on a weekly basis to ensure project plan is being properly implemented and managed towards completion.

Client Learning Services
Multimedia Training - Vision
MTV is an interactive, internet-based program composed of self-study tutorials for Vision. The MTV lessons offer basic instruction that prepares your staff for WBT courses.

Web Based Training Vision
Web-based training courses are accessed via the Internet, and can be in the form of "live" instructor-led training or through the replay of previously recorded classes. Employees may attend an unlimited number of classes from the curriculum (applieduniversity.com) for one year.

Remote phone activation
A trainer is available by phone to provide guidance through the activation process of the Vision product.

Onsite system activation
A trainer assists your agency with the activation of the Vision product while on-site. The trainer will provide your agency with the workflow, activation worksheets and consultation to guide you through the various areas of activation.

Key People Training
An Applied trainer will provide a system overview including File Activity, Client Activity, Accounting Functions, System Utilities, Night Utilities, Close day, Documents and Proposals setup, Reports, Custom Agency Workflows, and Custom Decs if applicable.

Data Services
Sample Data Migration(s)
Complete sample migration(s) will be provided via terminal server or CD for your agency review and analysis. Refreshed data will be supplied for second sample deliverables.