


Dana Beals



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INDEPENDENT CONSULTANT

My "why" is to find a better way
and share it with you!

 *I help agencies
discover operational
excellence! This might
be leadership coaching,
change management, AMS
optimization, workflow
reviews, or migration
assistance.*

GET IN TOUCH WITH DANA



dana@danabeals.com



269.808.4068



danabeals.com



MAXIMIZE YOUR AGENCY

Dana is a third-generation insurance agency owner who served as senior consultant for Applied Systems where she converted large agencies to Epic. Dana also was a Director of Operations for INSURICA and oversaw more than 20 branch operations. As a consultant, Dana focuses on efficiency, innovation, and collaboration.



Specialties

- Applied Epic AMS
- Operational Efficiencies
- Developing Workflows & Procedures
- Process Mapping
- Lean/Six Sigma



Experience

- Insurance Agency Operations Consultant - Dana Beals Consulting
- Assistant Vice President, Director of Operations – INSURICA
- Senior Consultant – Applied Systems
- President – Nulty Insurance

*Dana is your go-to for all things Applied Epic:
migration assistance, optimization, process/
workflow review, training and more.*