


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.