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Business readiness support session

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Today's agenda

1 | DCM: MUA update

2 | DCM: Pilot findings

3 | DCM: Business readiness checklist for release 1

4 | DCM: Registering for Training

5 | DCM: 'Draft' contracts in BAR

6 | DDM: Communication updates

7 | DDM: SOPs update

8 | Next steps

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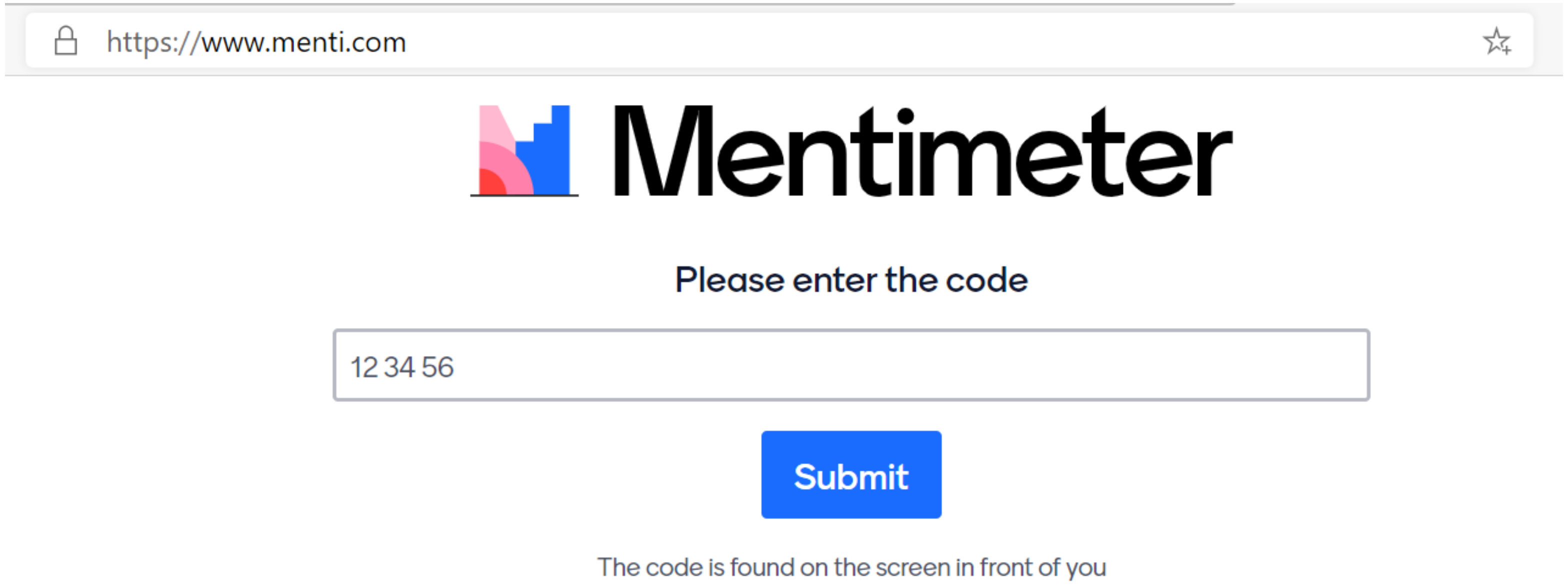
Delegated Contract Manager

Pilot, DCM Readiness Checklist, End User Training, Drafts in Bar, MUA Update, Time Savings

Share your anonymous questions & feedback today

Go to: https://www.menti.com and enter pin: **86 88 62**



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DELEGATED CONTRACT MANAGER – PILOT

CONTEXT

- **What was the Pilot?** An initiative to prove to the Market Release 1 DCM functionality using real contract data
- **When did it take place?** December 2020
- **Who participated?** Atrium (and Bowood) + Brit; contracts entered by Lloyd's DUA team (Lindsey Davies)
- **What was its scope?** Entering BAR + skeleton contract data and generating slip in Microsoft Word which could be completed offline and used to put lines down on. It did not include full Registration or DDM integration

CONTRACT INFO

3x contracts generated in the system

- **2x Brit**: Service Company Property and Liability contracts
  - Both had: Property and Liability risk codes + Multi section with multiple limits and complicated structure of COBs requiring mapping of risk codes
  - One annual, one multi year
- **1x Atrium** & **Bowood**: 3rd Party Coverholder Property and Liability contract
  - 8 sections and multiple risk codes
  - Very complicated structure with limits and sections mixed and duplicated across each section
  - Sections ed by type of cover rather than class of business

BRIT

Howden Group Holdings

ATRIUM

KEY FINDINGS & LESSONS LEARNED (NOT EXHAUSTIVE)

- Registering a contract on the system was relatively quick & straightforward, but completing the generated skeleton contract required more effort
- A crib sheet will be required to inform users how to structure a slip
- Governance required across LMA & Lloyd's to ensure the most current wordings and versions are used
- Further work may be needed post MVP in the following areas:
  - Validation too stringent for risk location class of business
  - Common Section Details tab expanded to include some of the class of business fields
  - Tables in the Schedule of the generated contract (divided opinion – follow-up required)

WHAT WE ACHIEVED

1 **Real contracts generated…** proving it is possible to start in Pega UI as part of registration and complete in Microsoft Word

2 **System issues identified early…** with use of live data, including ability to input SYOA and system performance[1]

3 **Exposure to the system gained…** both from key Lloyd's and participant stakeholders

4 **Market feedback obtained…** through live demos during Pilot and from outputted contract

5 **DevOps dress rehearsal conducted...** for setting up a Live environment, with close collaboration between Lloyd's and Accenture tech teams

[1] 7x potential defects raised and 2x new user stories created)

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DCM Readiness Checklist

We will maintain a 'live', regularly updated checklist within the Business Readiness Toolkit pages. As and when timelines are confirmed we will update this version and notify Change Leads of updates.

Workstream	Owner	Activity	Mechanism	Start	Due
Training	Change Lead	To provide email address for organisation's priority (pre-go live) and non-priority (post-go live) end users who will be attending instructor-led training	Change Leads to email DCOMtraining@lloyds.com	18/01/21	29/01/21
Business Readiness	Change Lead	Confirm interest in using Release 1 Contract Builder	Survey from DA Change Team	04/02/21	04/02/21
Business Readiness	Change Lead	Develop a change and adoption plan for your organisation	Template to be provided by DA Change Team (w/c 18 Jan)	25/01/21	17/05/21
Business Readiness	Change Lead	Organise and manage data cleansing activities for your organisations (e.g. draft contracts in BAR, spelling mistakes in company section of ATLAS). Please see Data Quality in the Business Readiness Toolkit	Update in BAR and ATLAS	14/01/21	03/05/21
Onboarding	Change Lead	Confirm organisation Nominated Registrant	Survey from DA Change Team (TBC)	TBC	TBC
Onboarding	Nominated Registrant	Complete registration form for their organisation	Emailed Link to Registration	TBC	TBC
Onboarding	Legal Signatory	Sign DCM legal agreement	Automatic Notification from Service Now to sign to Legal Agreement (Adobe e-sign)	TBC	TBC
Training	Pre-Go live training end-users	Register for Pre-Go Live Delegated Contract Manager instructor-led training sessions	Emailed link to training registration site	TBC	TBC
Onboarding	Authorised Contact	Create, approve and manage their organisations Devolved Administrators	Service Now Form sent in an automated email	TBC	TBC
Onboarding	Devolved Administrator	Create and manage their organisation's employee's access to DCM	Service Now Form sent in an automated email	TBC	TBC
Training	Prioritised End-User	Attend instructor-led training sessions (Pre-Go Live)	Automatic Outlook Calendar Invite	TBC	TBC
Comms	Change Lead	Arrange for advance email communication of switch-over from BAR to DCM (including access instructions)	Adapt template provided by DA Change Team	TBC	TBC
Comms	Change Lead	Arrange for message linking to self-service training materials	Adapt template provided by DA Change Team	TBC	TBC
Training	Non-Priority End-User	Follow-up invitations to to register for Post Go-Live Instructor-led training sessions	Email Link to training registration form. Adapt template provided by DA Change Team	TBC	TBC
Go-Live	**N/A**	**System Go-Live**	**N/A**	TBC	TBC
Business Readiness	Change Lead	Conduct spot check of migrated contract data following data migration	Email ServiceNow (email TBC) with any specific data migration issues	TBC	TBC
Business Readiness	Change Lead	Communicate go-live to their organisation via email	Template provided by DA Change Team	TBC	TBC
Business Readiness	Change Lead	Test organisation access URL for live instance of DCM, Service Now portal and training materials in case of firewall issues	Access DCM, Service Now environments	TBC	TBC
Training	Non-Priority End-User	Attend post-go live instructor-led training	Email / calendar reminders	TBC	TBC

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Confirmation of end-users for live training

CONTEXT: We need to confirm the number of live training sessions required before and after go-live of Delegated Contract Manager. To do this we are requesting Change Leads to provide the email addresses of end-users in their organisation that will require live (instructor-led) training.

IMPORTANT NOTES:

- No system access will be granted to the market before go-live. Therefore, we recommend the majority of end-users only attend live training after go-live so that they can immediately apply their learning in the live environment to support familiarisation and retention of learning.

- **The only end-users that should attend pre-go-live training are those that have a critical need for use of DCM from Day 1 of go-live (e.g. Brokers and direct deal Managing Agents who have imminent July renewals). All other users should be allocated to post-go-live training.**

- We will only offer a limited number of training sessions pre-go-live (training design can only complete after system development completes), so please carefully consider if your end-users have a critical need to be trained pre-go-live. If we reach capacity for pre-go-live training, we may need to cap registrations by firm.

- **RISK** - If you do not provide DCM end-user email addresses, we will be forced to estimate your organisation's demand for live training of end-users. This may result in us being unable to provide live training to all your organisation's end-users soon after go-live.

- **Communication** - Lloyd's will communicate directly with end-users to issue training registration invitations, training session reminders, and e-learning links.

ACTION FOR CHANGE LEADS

- **Change Leads should provide all DCM end-user email addresses, identifying which select users require training pre-go-live and the remainder that can be trained post-go-live.**
- **Please complete the training form, submitting responses to DCOMtraining@lloyds.com by 29 January.**

***By providing end-user email addresses, you are providing consent that Lloyd's has permission to contact end-users regarding DCM training**

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Migrated Contracts – 'Draft' in BAR

Contracts Dated Prior to 31st December 2019

- Any contract currently in BAR with a status of "**Draft**" and dated prior to 31/12/19 as per the BAR reference will be migrated and reclassified as **"Not Taken Up".**
- If a contract has incepted but is has the status of **"Draft"** on BAR prior to 31/12/19, this status will need to be changed to **"Registered"** (which may require some fields on BAR to be completed) for this to be reflected on Delegated Contract and Oversight Manager post-migration."
- Any contracts with the status **"Registered"** in BAR will be migrated as **"Active"** if the expiration date has not already passed or will be migrated as **"Expired**" if the expiration date has passed.

Contracts Dated 1st January 2020 onwards

- '**Draft**' contracts dated 01/01/20 onwards will be migrated with status of "**Draft - sitting with contract creator for completion**".

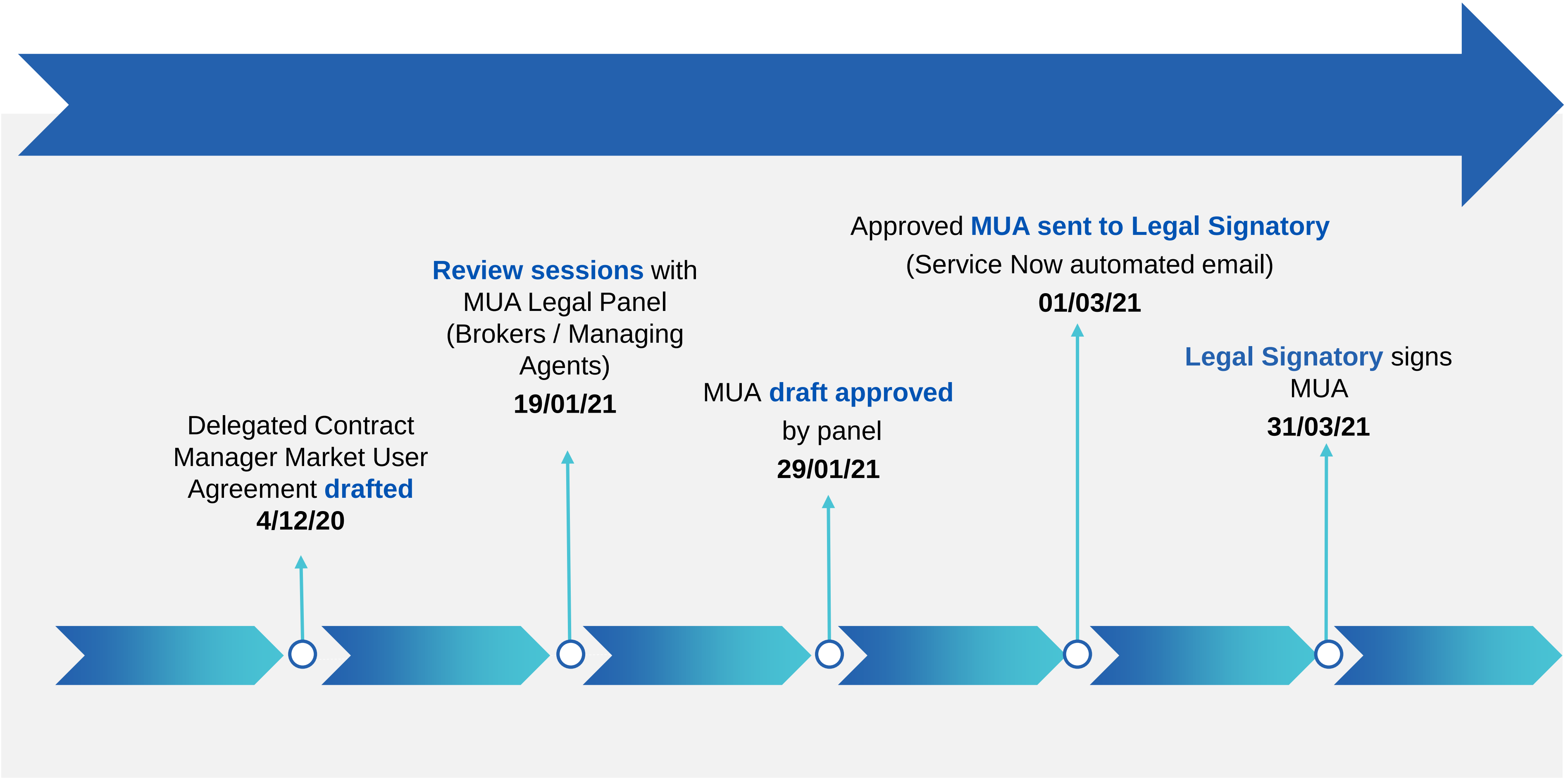
ACTION FOR CHANGE LEADS

Initiate BAR contract review activities in your organisations

RISK – If you do not check if your BAR records have the correct status prior to migration, records may be assigned the wrong status when migrated. For example, if a contract dated 30/12/2019 had been incepted and expired but for some reason the status was still **"Draft"** instead of "**Registered",** the migration rules would migrate this contract to **"Not Taken Up**" whereas it should have been migrated to the status **"Expired".**

DCM: Market User Agreement (MUA)

What's happening and when?



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Release 1 DCM – Time Savings

Currently

- Contract data is entered manually multiple times throughout the Delegated Authority ecosystem, often incorrectly, which causes delays and errors downstream *(e.g. For Declaration Only submissions)*.

DCM Release 1 (Q2 2021)

- To reduce time spent re-keying data and risk of downstream errors, we are ensuring data quality through **more structured data capture in Delegated Contract Manager**.
- Although this means an increase in upfront effort of registering a contract (due to additional fields) this contract data will flow downstream **significantly reducing the time and effort for contract set-up in Delegated Data Manager.**
- **Release 1 of Contract Builder,** will result in little change from due to requirement to key in information.

	Role Persona	Total Time (Currently)	Currently	Total Time (DCM Release 1)	DCM Release 1
Contract Registration	Typically **Brokers**, in some scenarios Managing Agents or Coverholders that deal direct. Managing Agents approves	10 – 15 Mins	Contract data keyed into BAR, but data does not feed downstream into other DA systems (DDM).	25 – 35 Mins	Increase in upfront effort per initial contract registration due to more structured data capture (additional fields).
Contract Builder	Typically **Brokers**, in some scenarios Managing Agents or Coverholders that deal direct. Managing Agents approves	15 Mins Per Section	Contract data is keyed into template (Microsoft Word). Estimated time is dependent on slip complexity.	15 Mins Per Section	• **Release 1 of Contract Builder,** will result in little change from due to requirement to key in information. There is some benefit realised through the 'Common Detail Section' which will enable identical information to be copied across sections. • **Release 2 of Contract Builder** - API integration will enable organisations send and receive contract data, reducing rekeying efforts.
Contract Renewals	Typically **Brokers**, in some scenarios Managing Agents or Coverholders that deal direct. Managing Agents approves	10 – 15 Mins	Contract data keyed into BAR, but data does not feed downstream into other DA systems (DDM).	10 – 15 Mins (first renewal) 5 Mins (subsequent renewals)	Increase in upfront effort for first renewal of existing contracts within Delegated Contract Manager due more structured data capture (additional fields).
Contract Set Up in DDM	Typically **Managing Agents,** but can be Brokers / Coverholder (if assigned as Contract Admin)	60 Mins	To create a multi-section contract in Delegated Data Manager today.	10 - 15 Mins	85% of contract setup data in Delegated Data Manager will be auto-populated using contract data from Delegated Contract Manager, **significantly reducing time and effort.**

Delegated Data Manager

Change Updates

Delegated Data Manager

Key updates

Consultation Outcome (Market Bulletin)

- **What**: Market Bulletin providing updates on recent consultation process
- **When**: Awaiting governance sign-off
- **Who**: All who received the Market Bulletin Y5311 on Conditions of Trade on 27th October 2020

DDM Drop-in Q&A Session Invitation to Register (Email)

- **What**: Email invitation to an informal DDM drop-in Q&A session with SMEs – RSVP registration form provided
- **When**: Exp. w/c 1st February
- **Who**: Change Leads (+1)

DDM Release 3.4 Training Sessions (Microsoft Teams)

- **What:** Demo/training sessions on release 3.4 enhancements ongoing
- **When:** Next sessions taking place Friday, 15th, 22nd and 29th January (email invitation sent before Christmas)
- **Who**: DDM users

Delegated Data Manager: Standard Operating Procedures

Progress update

SOPs made available to market **via the LIMOSS Website.** Click here to access the SOPs**.**

LIMOSS Site > Delegated Data Manager > Training on DDM

Standard Operating Procedures (SOP)

Please find a set of Standard Operating Procedures (SOPs) that describe the activities necessary to complete the Contract Setup (applicable to lineslips) and Bordereaux Mapping processes within the Delegated Data Manager (DDM) system.

- Claims Bordereaux Standard Operating Procedure (SOP)
- Contract Setup Standard Operating Procedure (SOP)
- Premium Bordereaux Standard Operating Procedure (SOP)

We value your **feedback**

- We require **market feedback** to ensure the SOPs remain accurate and useful.
- Please contact DAChangeSupport@Lloyds.com if you have any **questions** or **feedback** on any of the SOPs.
- **Thank you** to everyone who has been involved in the development of these SOPs.

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Next steps

- **Review and share** this presentation with all DA Managers within your group
- **Get in touch if your organisation requires training** for Delegated Data Manager Release 3.4 and has not yet registered (by 21 January)
- **Look out for your invitation** to the Delegated Data Manager drop-in sessions (to be issued w/c 25 January)
- **Confirm all end-users** for Delegated Contract Manager live (instructor-led) training and email registration form to DCOMtraining@lloyds.com (by 29 January)
- **Change Leads** to initiate BAR 'draft' contract review activities in your organisations
- **Provide feedback** on Delegated Data Manager Standard Operating Procedures (by 29 January)