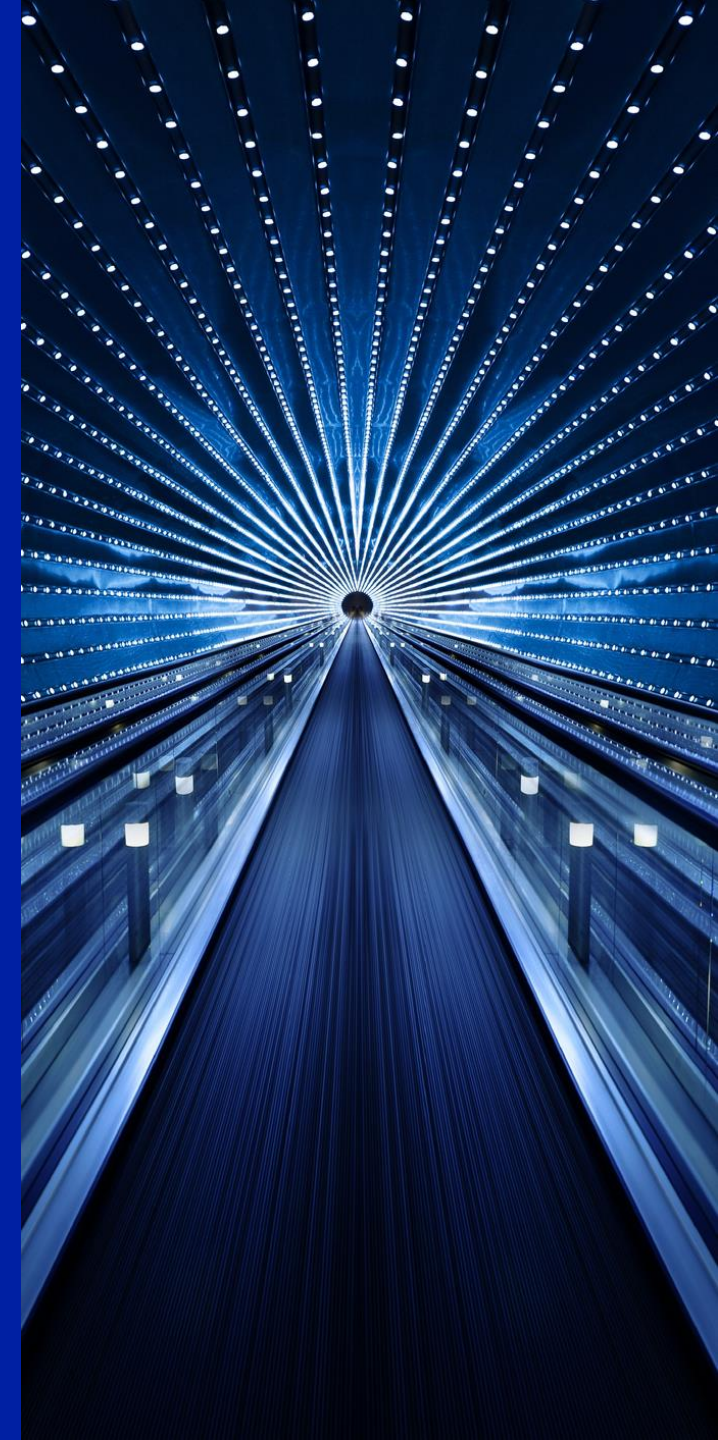


Business readiness support session



Today's agenda

- 1 | Delegated Contract Builder demo
- 2 | Delegated Contract Manager – structured data capture
- 3 | Delegated Data Manager 'conditions of trade' (mandate)
- 4 | Delegated Contract Manager training plans
- 5 | Business readiness toolkit updates



Getting the most out of these sessions

- Speak up where anything is not clear to you
- No question is too 'basic' or 'foundational'!
- We recognise that you may not have had time to digest everything
- To enable you to ask questions / provide challenge anonymously today, we will be using 'Mentimeter' (a real-time feedback tool)
- You can follow-up any time via DAChangeSupport@Lloyds.com

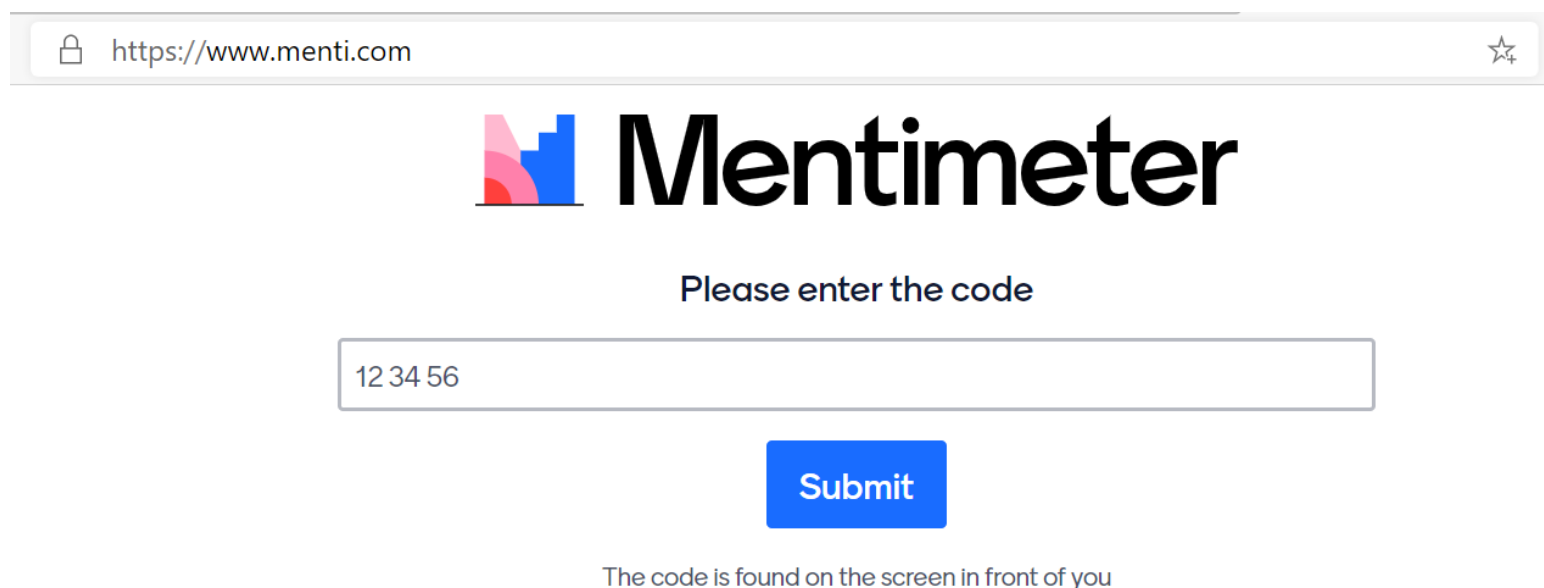
What we need from you

- Proactively share everything we share with you with all DA Managers across your organisation and wider group so you can effectively collaborate to prepare for changes
- Email DAChangeSupport@Lloyds.com with:
 - ✓ Feedback on sessions, FAQs and business readiness toolkit so we can evolve these to meet your needs
 - ✓ Any follow-up questions or requests for support

Share your anonymous questions/feedback today



Go to: <https://www.menti.com> and enter pin: **72 82 60 5**



The screenshot shows the Menti poll interface. At the top, a browser address bar displays 'https://www.menti.com' with a lock icon on the left and a star icon on the right. Below the address bar is the Menti logo, which consists of a stylized bar chart with red, pink, and blue bars, followed by the word 'Mentimeter' in a large, bold, black sans-serif font. Underneath the logo, the text 'Please enter the code' is centered. Below this text is a long, thin rectangular input field containing the numbers '12 34 56'. Centered below the input field is a blue rectangular button with the word 'Submit' in white. At the bottom of the interface, the text 'The code is found on the screen in front of you' is centered.

Delegated Contract Builder Demo

The screenshot displays the 'Create Contract' form in the Lloyd's DA Market Participant Portal. The form is in the 'General Contract Information' step, showing fields for Unique Market Reference Number (UMR), Agreement Number, Period From, Period To, and Multi Year Contract. A calendar is open for the 'Period From' field, showing the date 15/06/2021.

Contract ID: 04-SC-200618-005 UMR: 81806COMPLETED123 DRAFT

1. Core Questions 2. General Contract Information 3. Section Details

Unique Market Reference Number (UMR) *
B - 1806 COMPLETED123

Agreement Number
#123alpha

Period From: 15/06/2019 Period To: 14/06/2020 Multi Year Contract: ☐ Yes ☒ No

Both Days Inclusive? ☒ Yes ☐ No

Calendar: Jun 2021

Contract Lead

Pulse

Post +

YO Start a conversation

Cancel Save Continue

Structured data capture via Delegated Contract Manager

Improving contract data quality to streamline downstream processes

Currently...

BAR

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*).

Delegated Data Manager

We estimate a multi-section contract takes **1 hour** to set up in Delegated Data Manager today.

From Q2 2021...

Delegated Contract Manager

To reduce time spent re-keying data and risk of downstream errors, we are ensuring data quality through **more structured data capture**. This means upfront effort of registering a contract will increase due to additional fields.

We estimate approximately **30 mins extra effort** per initial contract registration, and the same amount of extra effort for the first renewal of existing contracts within Delegated Contract Manager.

Delegated Contract Manager

Optional APIs will be available for contract registration and creation (**estimated availability Q4 2021**)

Delegated Data Manager

Improved quality contract data in Delegated Contract Manager will be automatically transmitted Delegated Data Manager. We estimate **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**.

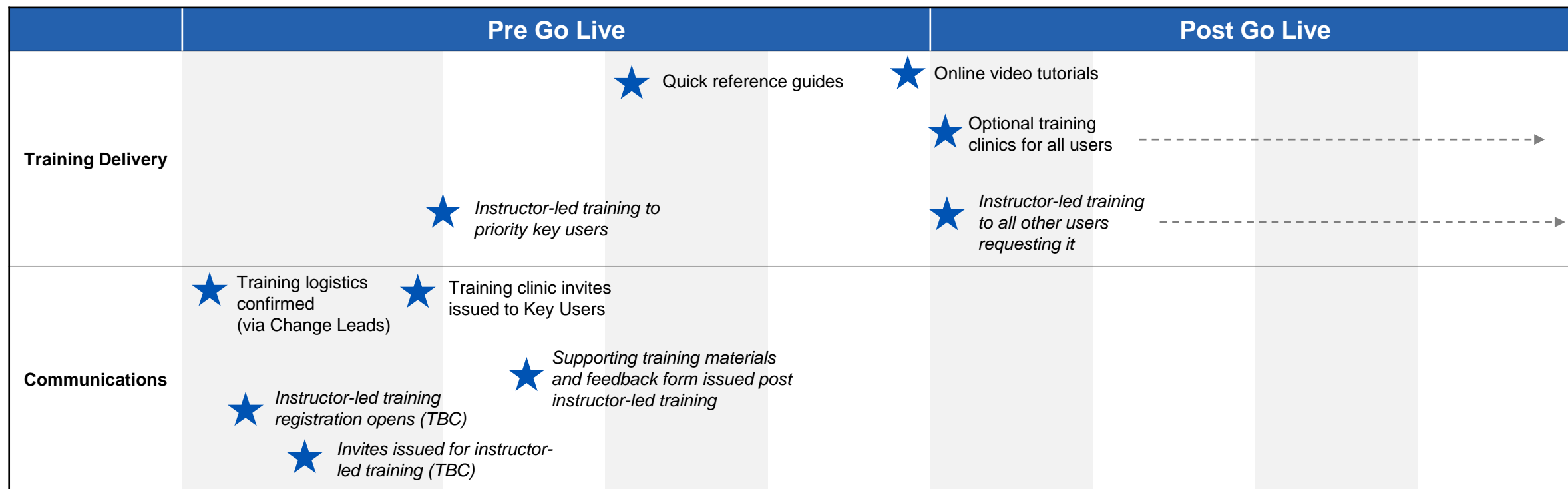
Delegated Data Manager Conditions of Trade

Current status and plan as of 13 October **(subject to change)**:

- Working towards final governance sign-off by Monday 19 October.
- Informal 2-hour consultation/Q&A drop-in sessions for DA Change Leads focused on Conditions of Trade for Managing Agents on Wednesday 21 October (TBC).
- Plan to formally communicate the Conditions of Trade to the market by Friday 23 October.
- **Note:** Invitations to attend these sessions will be sent 1-2 days prior, given sensitive nature of governance processes.

Lloyd's plans to give DA Change leads the opportunity to understand and ask questions prior to formal communication to the market – regardless of whether governance outcomes are delayed.

Delegated Contract Manager Training Approach



Delegated Contract Manager Training Approach

Training will combine self-service and instructor-led training to cater for all users' preferences:

Instructor-led training	Quick Reference Guides	Video Tutorials	Training Clinics
<ul style="list-style-type: none">• To be conducted remotely via MS Teams• Training to consist of live interactive demos and Q&A• Feedback form and supporting training materials to be issued on completion of training• Lloyd's recommend that key users participate ahead of Release 1 go-live	<ul style="list-style-type: none">• Suite of comprehensive guides, including step-by-step instructional content and images of DCM screens• Accessible via Lloyd's new Service Now Knowledge Base	<ul style="list-style-type: none">• Online tutorials to be made available in time for go-live• 2-5 minutes in length• Covering specific components of the system, such as creation and registration of binders• Accessible via Lloyd's new Service Now Knowledge Base	<ul style="list-style-type: none">• Virtual 'drop in' clinics run by Lloyd's training team• Opportunity for end users to raise any system queries for support• Plan to continue these after go-live – at duration and frequency that will evolve in response to feedback from the market

Access to a 'sandpit' environment to support system familiarisation will be available to all users

Delegated Contract Manager Training of Key Users

Objective: Ensure market firms' key users are familiar with DCM ahead of go-live, so they can also support colleagues who *are less frequent users*

Recommended Key User Responsibilities:

- Participate in virtual instructor-led training ahead of go-live (optional)
- Share knowledge of DCM within DA department(s) and supporting functions
- Provide support to other DCM users – helping them navigate and use the system

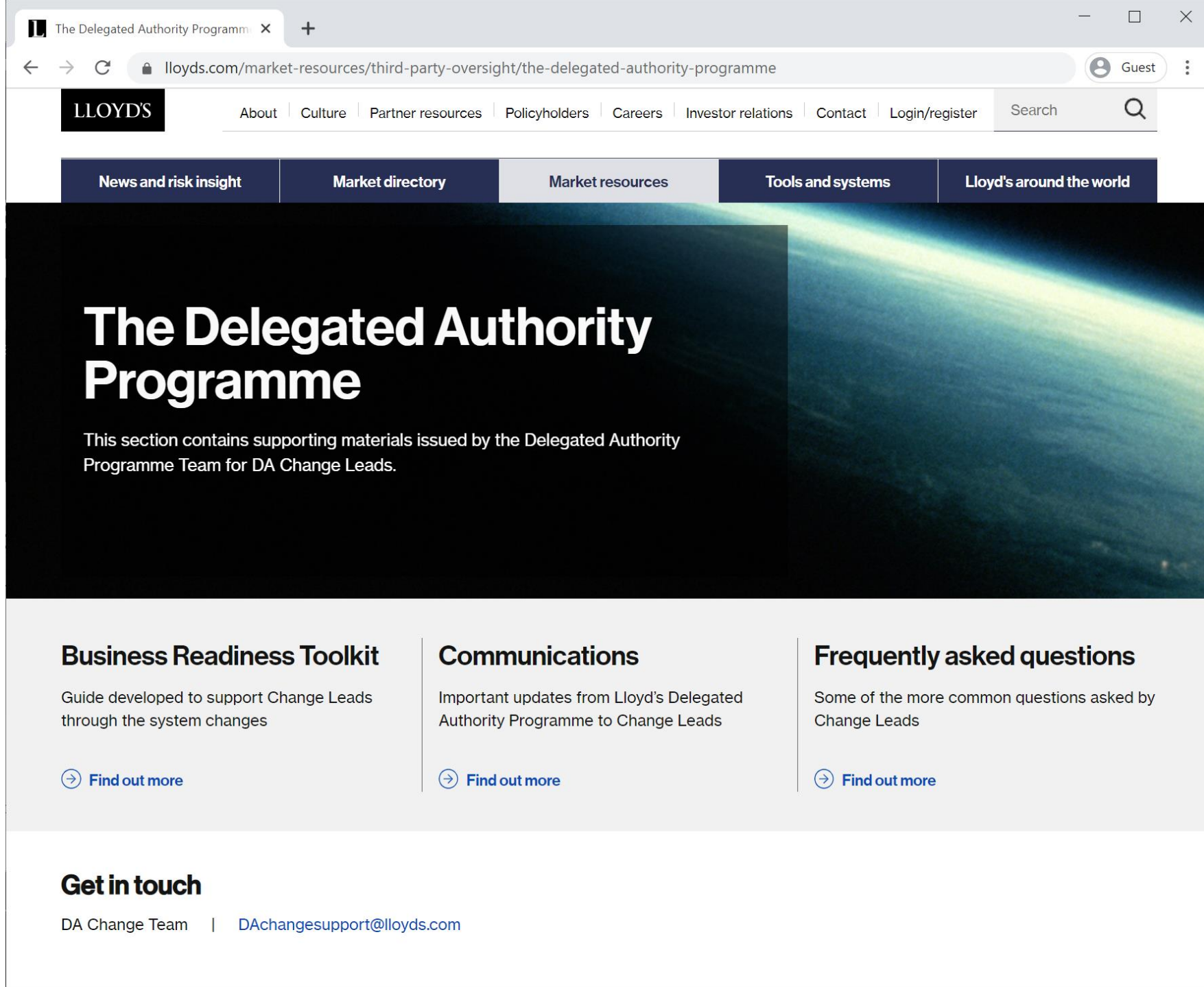
Delegated Contract manager Training Survey

To help us prioritise training resources as effectively as possible, we will be asking you to confirm:

1. For your organisation, how many key DCM users do you estimate must be prioritised for live instructor-led training before go-live?
2. How many of your DCM users requiring live instructor-led training do you estimate could be trained *after* go-live? (*given frequency of BAR usage*)
3. How many of your DCM users do you estimate would prefer to rely on self-service training options (videos and quick reference guides), instead of live training?
4. What's the total number of DCM users you expect for your organisation in 2021?

Have you seen the latest guidance on our site for DA Change Leads?

lloyds.com/dachangeleads



The screenshot shows a web browser displaying the Lloyd's website. The browser's address bar shows the URL lloyds.com/market-resources/third-party-oversight/the-delegated-authority-programme. The page features a dark header with the Lloyd's logo and navigation links: About, Culture, Partner resources, Policyholders, Careers, Investor relations, Contact, and Login/register. A search bar is also present. Below the header is a horizontal menu with five categories: News and risk insight, Market directory, Market resources (which is highlighted), Tools and systems, and Lloyd's around the world. The main content area has a dark background with a bright, curved light effect on the right. It features the title "The Delegated Authority Programme" in large white text, followed by a subtitle: "This section contains supporting materials issued by the Delegated Authority Programme Team for DA Change Leads." Below this, there are three columns of content, each with a title, a brief description, and a "Find out more" link with a right-pointing arrow icon. The columns are: "Business Readiness Toolkit" (Guide developed to support Change Leads through the system changes), "Communications" (Important updates from Lloyd's Delegated Authority Programme to Change Leads), and "Frequently asked questions" (Some of the more common questions asked by Change Leads). At the bottom of the page, there is a "Get in touch" section with the text "DA Change Team" and the email address DAchangesupport@lloyds.com.

The Delegated Authority Programme

This section contains supporting materials issued by the Delegated Authority Programme Team for DA Change Leads.

Business Readiness Toolkit
Guide developed to support Change Leads through the system changes
[Find out more](#)

Communications
Important updates from Lloyd's Delegated Authority Programme to Change Leads
[Find out more](#)

Frequently asked questions
Some of the more common questions asked by Change Leads
[Find out more](#)

Get in touch
DA Change Team | DAchangesupport@lloyds.com

Recent updates to the business readiness toolkit

1. Improved future workflow overviews for contract creation and contract registration
2. Release 1 and 2 scope for Delegated Contract Manager
3. Information about API Design Programme for Delegated Contract Manager
4. Clarifications about Delegated Contract Manager data migration approach and requirements
5. Revision to view of 'change impacts' over time (addition of Q3 2021 transition state)
6. Exemplar internal communication and engagement plan



<https://www.loyds.com/market-resources/third-party-oversight/the-delegated-authority-programme/business-readiness-toolkit>

Next steps

- **Review and share** this presentation and the business readiness toolkit with all DA Managers within your group
- **Share feedback** on the latest business readiness guidance with Lloyd's DA Change Team (by 30 October)
- **Complete** training survey, to be emailed to Change Leads w/c 19 October (by 6 November)
- **Attend** next business readiness workshop in November

