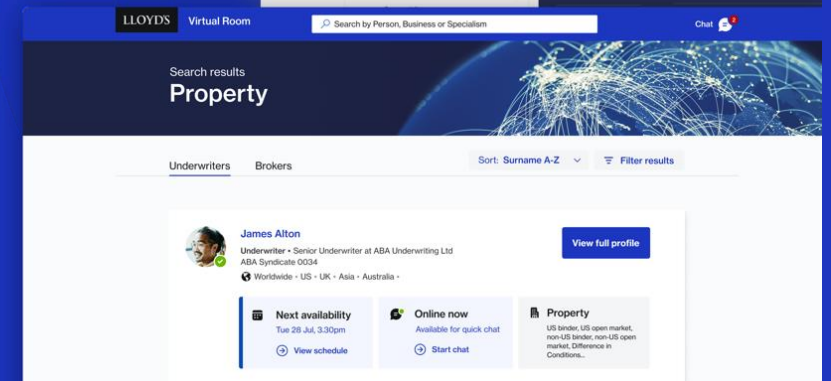
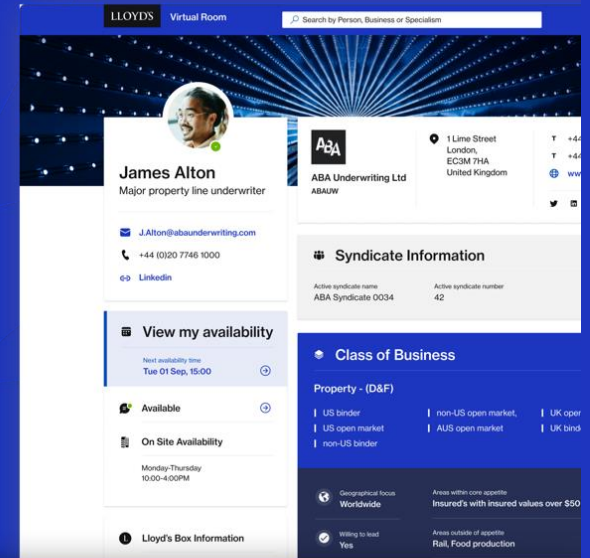


Virtual Room onboarding pack

To the Organisational Administrator

Welcome to Lloyd's Virtual Room. Thank you for being the main point of contact for onboarding your organisation. We hope this pack guides you easily through the process. If you have any questions please email us at virtualroom@Lloyds.com and we will be happy to help you.

April 2021



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- What is the role of the organisational administrator?
- What is the role of the COB administrator?
- What is the role of the Cronofy administrator?

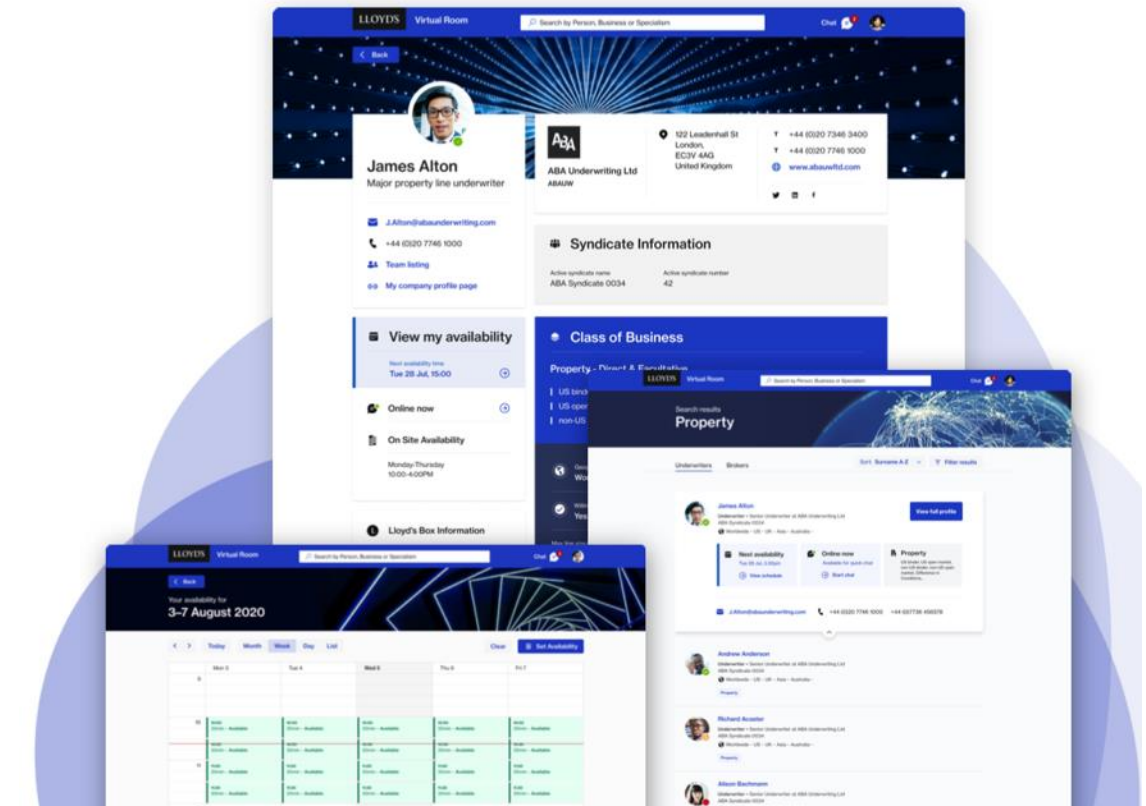
3. Working together

- Onboarding session
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- Enable calendar integration at the user level
- Use the Virtual Room for meetings

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Joining the Virtual Room

1 Organisational stage Assign administrative roles to your teams

At this stage...

...you've already accepted the terms of use for the Virtual Room. We'll reach out to you to gather key administrative contacts in your organisation.

We will...

Send you a company contact sheet to find out all the key contacts in your organisations.

Then you can...

Complete the company contact sheet, and send it back to us, identifying your Class of Business, and calendar integration admins.

2 Team stage Identify users and set-up calendars

At this stage...

...we have a list of your chosen Class of Business and calendar integration admins. We'll reach out to your COB admins to work out who will sit within these teams and reach out to your calendar integration admins.

We will...

Get in touch with the people you identified to find out VR users, and sort out the system integrations.

Then you can...

Complete the team sheets and send them back to us and work with our IT team to integrate the calendar integration plugin.

3 User stage Access the Virtual Room

At this stage...

...calendar integration is approved for use within your organisation, and we know all the users who need access. We'll host an onboarding session and then share access to the Virtual Room.

We will...

Invite all users to an introductory onboarding session, and share a registration link to all your users..

Then you can...

Log in and start using the VR.

What are the onboarding steps?

Steps 2 and 3 explained

1. To start the onboarding process, the organisational administrator needs to complete the Company Onboarding form to identify key contacts within the organisation who we can contact to set up access to the Virtual Room.
 2. We will then contact the COB administrators to ask each of them to complete a COB onboarding form. This information will be used to set up their business class team (such as team members, and profile details including: team contact number, class of business, sub-class and geographical territory focus).
 - As soon as COB administrators return their forms, we will start setting up accounts.
 3. We will contact your Cronofy administrator to ask them to approve Cronofy (to enable calendar integration for your organisation).
 - Once Cronofy is approved your organisation will be ready to access the Virtual Room access and we can proceed to the final stage of onboarding.
 4. For the final stage, the COB administrator and their business class team will receive an invitation to an onboarding session (where we will offer help with logging into the Virtual Room for the first time), and a New User Registration email providing access to the platform.
 - Note: Team level onboarding will operate as and when COB administrators return their team forms. For example, we will give access to the Virtual Room and provide an onboarding session where the Cyber COB administrator completes the COB onboarding form, while the Marine administrator for the same organisation may be delayed in returning their forms.
- ✓ Onboarding to the Virtual Room is complete.

Role of administrators: the organisational administrator

Role: a representative of the organisation, to act as a main point of contact for onboarding to the Virtual Room. This person will be the voice of the organisation, leading their organisation's involvement in the Future at Lloyd's. They will have the opportunity to shape the development of the Virtual Room, by being a key channel for their organisation to deliver feedback to the Virtual Room.

Primary responsibility: this person is responsible for completing a Company onboarding form.

Tasks: there are three tasks involved in completing the Company onboarding form to:

1. Verify organisational information that we will provide to you.
2. Identify someone in the IT department of your organisation for us to contact to ensure your organisation enables the calendar integration feature in the Virtual Room. We refer to this individual as a 'Cronofy administrator', because Cronofy is the name of the calendar integration service in the Virtual Room.
3. Identify representatives from each business class that would like access to the Virtual Room. We refer to these individuals as 'COB administrators' because they will be the main point of contact for onboarding their business class team. We will contact the COB admins individually for onboarding.

Skill set: appropriate knowledge of the organisation to be able to identify representatives for each business class that would like access to the Virtual Room, and to identify an IT contact to act as a Cronofy admin.

Time commitment: once the Company onboarding form is completed, the organisational administrator distributes onboarding responsibilities to the 'COB administrators'. From that point onwards the organisational administrator will be contacted only to update the organisation if there are changes or new releases to the Virtual Room that the organisation should be aware of.

Company onboarding form

This form is to be completed by your organisational admin, to set up your company and employees to the Virtual Room.

1. Company Information

Data field	Data	Notes
Company name		Mandatory
Company logo		Mandatory
Company pseudonym		Mandatory
Primary Company dialling code		Mandatory
Primary Company contact number		Mandatory
Secondary Company phone dialling code		Optional
Secondary Company contact number		Optional
Company address		Mandatory
Link to company website		Mandatory
Link to company social/s - LinkedIn		Optional
Link to company social/s - Twitter		Optional
Link to company social/s - Facebook		Optional
Class of business		Mandatory

2. Company admins

Organisational admin

Responsible for	Name	E-Mail address	Phone number	Job title
Onboarding the company				

COB admins

Responsible for	Name	E-Mail address	Phone number	Job title	Team name
Onboarding their business class team					e.g. Marine
					e.g. Terrorism
					e.g. Cyber

*Insert more rows if necessary

Cronofy admin

Responsible for	Name	E-Mail address	Phone number	Job title
Enabling calendar integration				

Role of administrators: the Cronofy administrator

Role: to enable the organisation to access calendar integration in the Virtual Room. Cronofy is the name of the calendar integration service.

Primary responsibility: this person is responsible for approving their organisation's use of the calendar integration service delivered by Cronofy.

Tasks: there are four tasks involved in approving Cronofy's calendar integration service:

1. Review the model for how Cronofy's Enterprise Connect service works.
2. Review the provided materials and take this through any internal review processes (this may be through an Infosec or architectural board).
3. Approve the use of Cronofy OR have a clear plan of approval to enable Cronofy within your organisation.
4. Once Cronofy has been approved, follow a **Calendar Integration Walk through** pack, showing you how you can set up Calendar integration in less than 30 minutes (by enabling Enterprise Connect for Cronofy for your organisation).

Skill set: usually someone from IT or Operations, with a technical background and Exchange tenant admin privileges.

Time commitment: 1-2 weeks, depending on how fast the Cronofy administrator is able to progress through the calendar integration steps. Once Cronofy is approved, and diary integration is enabled for the organisation, the Cronofy administrator's role expires.

The screenshot displays the Cronofy interface for 'James Alton's availability for 30 November – 4 December 2020'. The calendar view shows the following availability slots:

Day	Available Slots
Mon 30	10:00 - 10:30, 10:30 - 10:40, 10:40 - 10:50, 10:50 - 11:00
Tue 1	10:00 - 10:30, 10:30 - 10:40, 10:40 - 10:50, 10:50 - 11:00
Wed 2	10:30 - 10:40, 10:40 - 10:50, 10:50 - 11:00
Thu 3	10:30 - 10:40, 10:40 - 10:50, 10:50 - 11:00
Fri 4	10:00 - 10:30, 10:30 - 10:40, 10:40 - 10:50, 10:50 - 11:00, 11:20 - 11:30

Calendar integration

Role of administrators: the COB administrator

Role: a representative from a business class team acting as a main point of contact for onboarding.

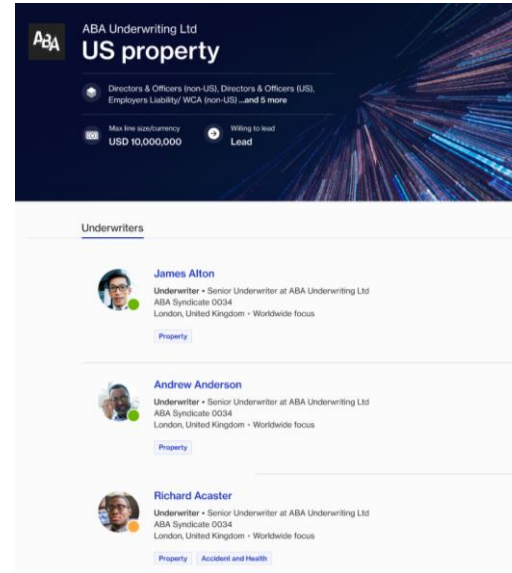
Primary responsibility: this person is responsible for completing a COB onboarding form. Champion the Virtual room within the team.

Tasks: there are two tasks involved in completing the COB onboarding form:

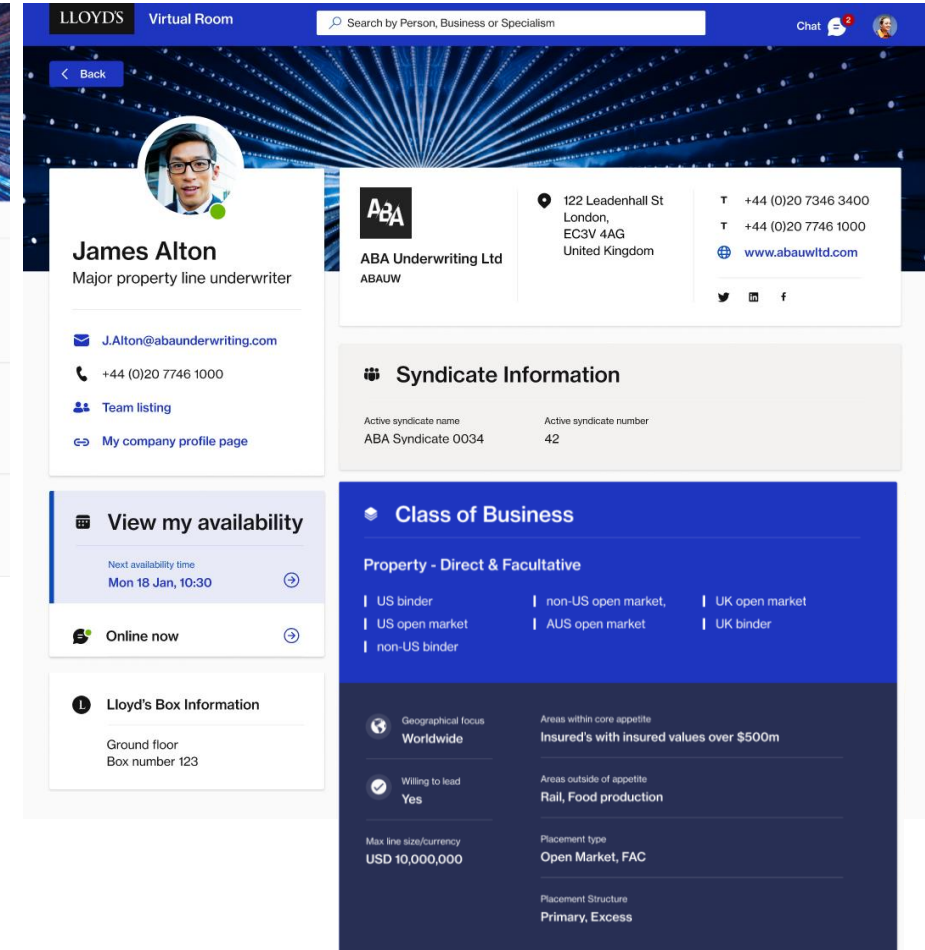
1. To list the members of your business class team.
2. To provide information about your team to be displayed on your Virtual Room profiles (such as class of business, sub-class and geographical territory focus, etc).

Skill set: appropriate knowledge of your business class team to be able to provide a list of team members, and business class details.

Time commitment: the time commitment is simply the time taken to complete the COB onboarding form, review and update Team information based on what you want the Lloyd's community to see.



Business class team view



Team insights shown on individual profiles

Working together: onboarding session

The final stage of onboarding is an invitation to an onboarding session. The purpose of the session is to welcome new users to the Virtual Room, and ensure a smooth experience when logging in for the first time.

Key details

- On the morning of the session you will receive a New User Registration email, once you receive this email you will have access to the Virtual Room.
- In the session we will help new users access their accounts for the first time and give a demonstration of the key features of the Virtual Room.
- Note: attendance is optional, however you may wish to attend so that you can support users the first time they go live.

Working together: research sessions

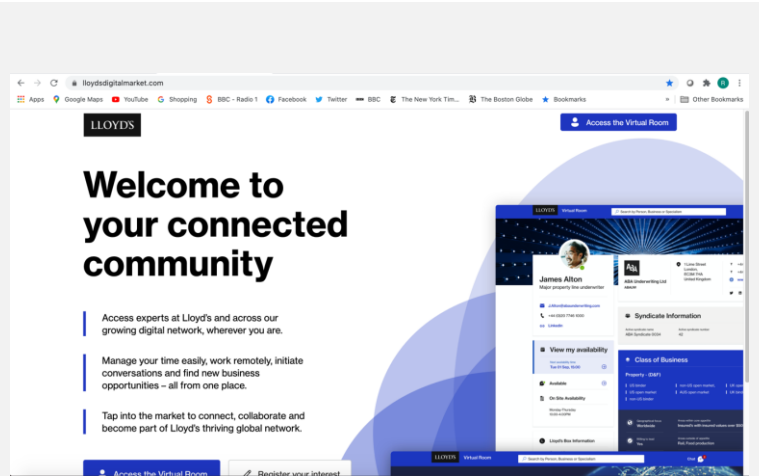
Being part of the Virtual Room means you can shape and influence its future. We invite you to provide ideas and feedback via our research sessions, giving us focus to new priorities or functionality that you'd like to see.

Key details

- Our research sessions are held on a weekly basis with users, to test new features and functionality for the Virtual Room.
- We test prototypes of new features and potential scenarios that users could find themselves in when using features. This test and learn approach helps us to continuously drive value to you.
- Sessions usually last around 45 minutes, and are one to one with a facilitator to ensure the best testing experience for participants. We don't hold group sessions as we find it's not enough time to get quality, unbiased answers from multiple people.
- If you're interested in shaping the Virtual Room, to get involved please contact virtualroom@lloyds.com

How to...log into the Virtual Room for the first time

Step 1



Open the Virtual Room access page

- ✓ Copy and paste into Chrome browser www.lloydsdigitalmarket.com
- ✓ Click on the blue button 'Access the Virtual Room'

Step 2

Enter your log in details

- ✓ **Username:** enter your lloydsdigitalmarket email address **NOT** your company email address
- ✓ **Password:** enter the first-time password (find this in the second set-up email we sent you)

Step 3

Enter your profile details

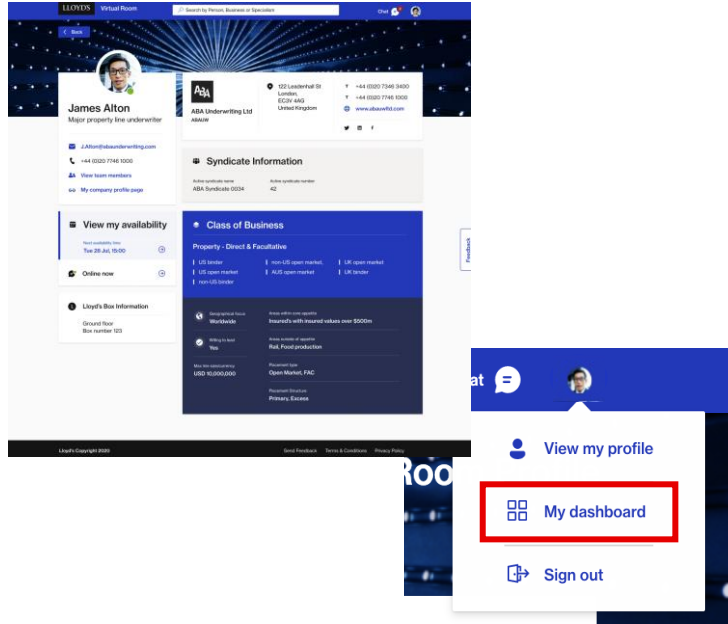
- ✓ Enter your company email for others to contact you
- ✓ Check the box in the bottom left-hand corner to agree with the privacy policy
- ✓ Click 'Complete my profile' to complete sign up!

Having issues? Try these quick fixes

1. Check you're using Google chrome or Edge - Internet Explorer will not work.
2. Check you're using your Lloyd's digital market email address- your company email will not work for log ins.
3. Use a laptop or computer to log in - a mobile device will not work.

How to...enable calendar integration at the user level

Instructions if your company has approved calendar integration *(For those who have already been onboarded)*



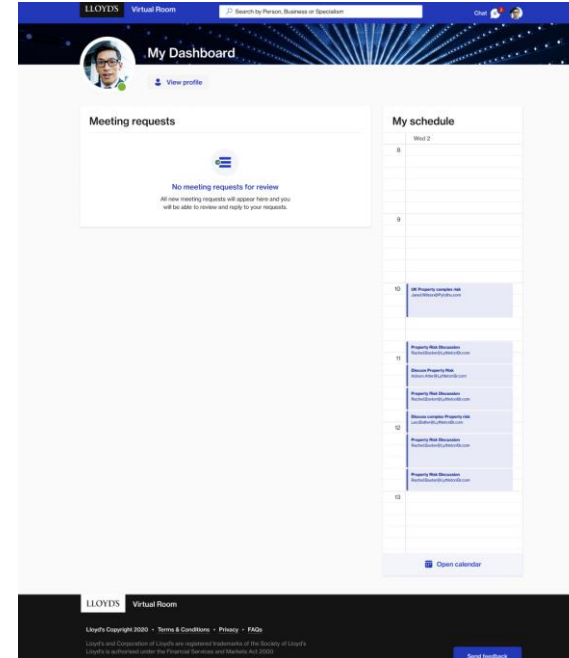
Connect your calendar

Your work calendar is now connected. As a final step select one of the following options

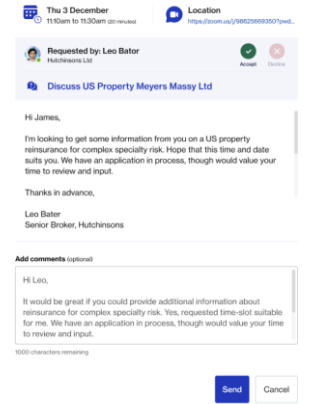
Select your calendar

- My Calendar
- UK Holidays
- Birthdays
- None

Connect Cancel



Meeting details



- Log onto the Virtual Room at www.lloydsdigitalmarket.com and you'll land on your profile page
- Go to the upper right hand corner where your icon is and go to 'My Dashboard' - which is in a dropdown option

- You will see a list of calendars
- Select 'My calendar' and press complete

- You'll be taken to your dashboard where you will be able to view and manage any requests and see your weekly calendar

How to...enable calendar integration at the user level

Instructions if your company has approved calendar integration *(For those who are being onboarded)*

Profile - COMPLETE - Final - Release 2 - For Development

LLOYDS Virtual Room

Welcome

Create your Virtual Room profile
Take a moment to fill in your details below. Once your profile is complete, you'll be ready to get started.

Personal details Connect calendar

Tell us about you Upload a new image

Include a photo of yourself to boost your profile

First name

Surname

Direct phone numbers (optional)
+44

Email

Job Title

LinkedIn Profile (optional)

I've reviewed and agree to the Privacy Policy Continue

Profile - COMPLETE - Final - Release 2 - For Development

LLOYDS Virtual Room

Welcome

Creating your Virtual Room profile
Take a moment to fill in your details below. Once your profile is complete, you'll be ready to get started.

Personal details Connect calendar

Connect your calendars

We've already connected your organisation Exchange calendar, now you just need to select your personal calendar to use the Virtual Room.

Select your calendars

My Calendar

UK Holidays

Birthdays

Complete

LLOYDS Virtual Room

James Alton
Major property line underwriter

ABU Underwriting Ltd
ABU Underwriting Ltd
ABU Underwriting Ltd

Syndicate Information

Class of Business

Property - Direct & Facultative

View my profile

My dashboard

Sign out

LLOYDS Virtual Room

My Dashboard

Meeting requests

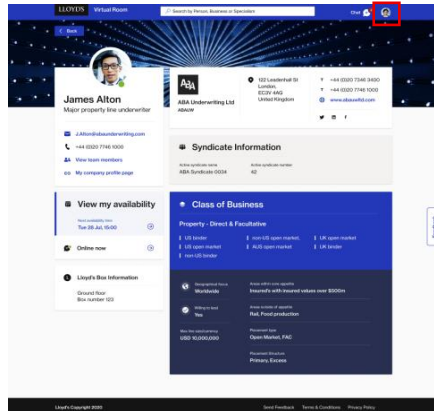
My schedule

Open calendar

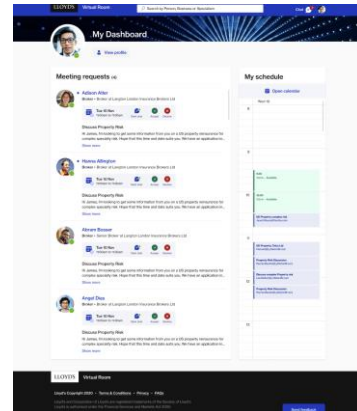
- Log onto the Virtual Room at www.lloydsdigitalmarket.com
- Log in with the details provided by the Virtual Room and add your onboarding information
- Confirm you've read the Privacy Policy by checking the box in the lower left hand corner and press "confirm"
- As your organisation has enabled Cronofy Enterprise Connect, you will be presented with the option to connect your calendar
- Select "My calendar" and press complete
- You'll be taken to your profile page
- Go to the upper right hand corner where your icon is and go to "My Dashboard" - which is in a dropdown option
- You'll be taken to your homepage where you will be able to view and manage your requests and see your weekly calendar

How to...use the Virtual Room for meetings

With this feature you can book and accept meeting requests in the Virtual room. Even if your organisation is in the process of enabling calendar integration, you can still book in slots with other users of the Virtual Room.



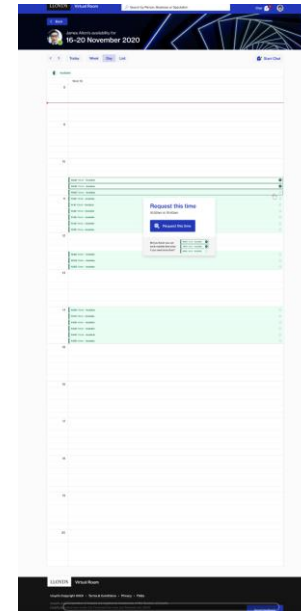
- Log onto the Virtual Room at www.lloydsdigitalmarket.com and you'll land on your profile page
- Go to the upper right hand corner where your icon is and go to "My Dashboard" - which is in a dropdown option



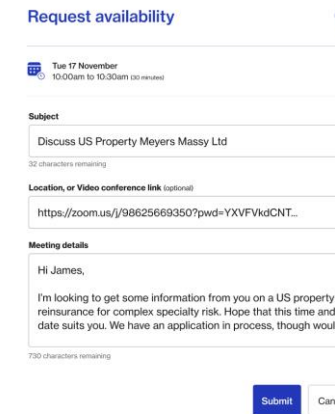
- On your dashboard, you can review any meeting requests or look at your weekly calendar to create a meeting
- To create a meeting, under my schedule click "open calendar"



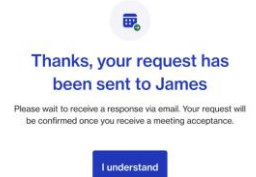
- On you schedule view, you can see the times you're available and busy



- Click the time you would like, if you want multiple time slots, just click the check mark to secure the slot.
- Then click "request this time"



- A pop up window will appear where you can input the meeting details and a voice or video link. Once you're done, press "submit"

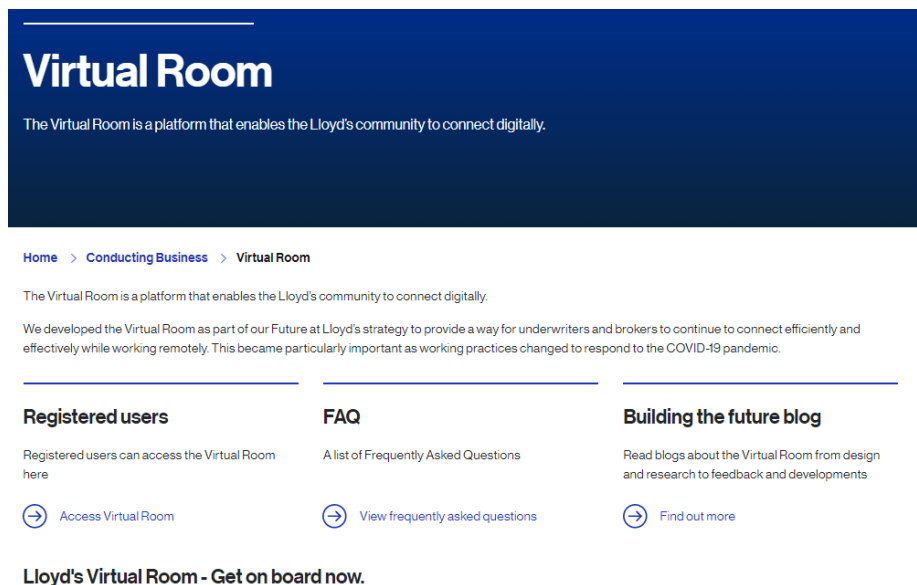


- You will get another pop up confirming your meeting request has been sent

Further information and resources

Please email virtualroom@lloyds.com if you have any questions, suggestions or feedback – we are here to listen and help.

The [Virtual Room webpage](#) has useful information and resources, including videos and Frequently Asked Questions. It also includes a list of organisations using the Virtual Room to which we look forward to including your organisation.



Virtual Room
The Virtual Room is a platform that enables the Lloyd's community to connect digitally.

Home > Conducting Business > Virtual Room

The Virtual Room is a platform that enables the Lloyd's community to connect digitally.

We developed the Virtual Room as part of our Future at Lloyd's strategy to provide a way for underwriters and brokers to continue to connect efficiently and effectively while working remotely. This became particularly important as working practices changed to respond to the COVID-19 pandemic.

Registered users Registered users can access the Virtual Room here → Access Virtual Room	FAQ A list of Frequently Asked Questions → View frequently asked questions	Building the future blog Read blogs about the Virtual Room from design and research to feedback and developments → Find out more
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Lloyd's Virtual Room - Get on board now.

