



Placing Platform Limited Property & Casualty Engagement Plan

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1 Document purpose

The purpose of this document is to -

- Define the approach & activities that need to be undertaken to engage the Property & Casualty (P&C) market in the planning of going live on PPL
- Define the outputs of the discovery phase (as defined below)
- Define the activities of PPL and Ebix on commencement of market engagement
- Define the decision process of roll out by the PPL sub-committees, PPL Board and TOM Steering Board

2 Overall engagement approach

The PPL team and the Market Associations have engaged the relevant Committees to agree the scope of the Property & Casualty roll out and to ensure that suitable users are engaged during the initial phase.

The agreed scope is as follows -

Property

- Non-Marine Property*

Casualty

- General Liability
- Employers' Liability/WCA
- Public Liability
- Product Liability
- Product Recall
- Medical Malpractice**

* Note – Power, Construction, & Energy excluded

** To the extent this is not placed in the FinPro market

The initial phase will involve a 3 session engagement with the objective of gaining agreement on class specific configuration directly from practitioners to ensure their set up is correct on roll out. The sessions will encompass the following -

- An interactive demonstration of the PPL platform and an overview of the change roadmap incorporating questions and answers
- Hands-on session (click-a-longs). This session will enable the practitioners to use the platform so they can understand how it works and to feed back any potential changes.
- The output of these sessions will be documented, distributed and agreed in session 3.

The proposed dates, times and locations for the meetings are as follows –

Introduction session - Tuesday, 2nd May 2017

- 10:00am to 11:30am in the Boardroom on G11 at Lloyds

Carrier click-a-long session – Thursday, 4th May 2017

- 09:00am to 11:00am, Ebix Europe, Dashwood House, 69 Old Broad Street, EC2M 1QS

Broker click-a-long session – Tuesday, 9th May 2017

- 09:00am to 11:00am, Ebix Europe, Dashwood House, 69 Old Broad Street, EC2M 1QS

Feedback session – Tuesday, 23rd May 2017

- 9:00am to 11:00am in the Boardroom on G11 at Lloyds

3 Market Association(s) pre-engagement activity

To help PPL understand the size of the roll out so adequate planning can be achieved, each Market Association will assist PPL with the following –

- Identify in scope market firms and practitioners (including estimated users)
- Provide contact details for newly identified in scope market firms
- Determine the relevant P&C committees that need to be engaged and consulted

4 Association committees

4.1 Inputs

- Proposed scope document for P&C
- PPL road map. This will articulate the changes that are already planned for PPL and when they will be delivered
- Demonstration of the PPL platform (where possible)

4.2 Outputs

- Agreement on in scope markets and how they can be phased and in what order (where desired)
- Nomination of market users to attend practitioner meetings. Where the next Committee meeting to be held is after the Practitioner meetings, this activity will need to be conducted by email.

5 Practitioner meetings

The output from the practitioner meetings will be -

- A document setting out the outcomes of the initial engagement phase including
 - The placing and agreement of risks electronically on PPL, can be achieved without issue
 - Details of P&C specific configuration e.g. class of business descriptions
 - A list of platform enhancements (if any)
 - Prioritisation of identified enhancements (if any)
- Presentation of findings to be sent to the Association committees
- A document outlining the features and potential benefits of PPL

6 Conclusion of initial engagement

Where there are changes identified, these will be documented by the PPL team and presented to the PPL Design and Change Group for agreement and prioritisation. Once agreed, they will be presented to the User and Operations Sub-committee for sign-off.

Any changes that are required for the P&C roll out, will impact the current road map. PPL governance groups will decide any changes to the road map.

7 Market engagement & roll out

Once the scope of the roll out has been agreed, PPL will engage the in scope firms so that the process of configuring users can commence in readiness for the agreement to go live.

7.1 PPL roll out team

The activities undertaken by the PPL roll out team are as follows -

- Market engagement - PPL make contact with the market firms who have been identified by the Market Associations as in scope. Once participation has been agreed, each market firm will need to complete an onboarding form (repeatable by class) and sign the Market User Agreement (MUA), if not signed previously.
- PPL QA each returned onboarding form before sending to Ebix for configuration
- Work with each market firm to document their readiness against the onboarding criteria
- Track users set up by Ebix
- Coordinate pre go-live testing of user configuration
- Communicate to broker firms the readiness of their Market's.
- Communicate the broker roll out plan
- Ensure the appropriate training has been made available to the Market
- Report on readiness

7.2 The activities undertaken by the firm

- Meeting with the PPL Market Engagement team
- Complete the PPL onboarding form
- If an MGA/Coverholder, supply a letter confirming capacity is 100% LMA/IUA
- Dial in to the weekly PM call
- Test their company configuration and user accounts pre-go live

7.3 Ebix

- Configure all new users on PPL

7.4 Sub committees & PPL Board

The following table details the activities required by each sub-committee to inform the PPL Board of their decision on whether to roll-out a class of business.

Committee name	Inputs	Outputs
IT	<ul style="list-style-type: none"> ➤ Quality gate results (if the roll out is dependent on a technical release, Performance testing results etc.) 	<ul style="list-style-type: none"> ➤ Provide a go/no-go decision on class roll out to the User and Operations Committee
Finance & Compliance	<ul style="list-style-type: none"> ➤ Notified of intention to go-live if there is no technical release ➤ Documentation on the technical release (where applicable) detailing adherence to compliance and regulatory requirements ➤ Quality gate results 	<ul style="list-style-type: none"> ➤ If there is a technical release, then need to determine if any change requires sign off from a compliance/regulatory perspective ➤ Provide a go/no-go decision on class roll out to the User and Operations Committee
User & Operations	<ul style="list-style-type: none"> ➤ Visibility of user readiness (including onboarding forms/MUAs completed) ➤ Input from the Design and Change Group on functional readiness ➤ A go/no-go decision on class roll out from the IT sub-committee ➤ A go/no-go decision on class roll out from the Finance & Compliance sub committee 	<ul style="list-style-type: none"> ➤ Provide a go/no-go decision on class roll out to the PPL Board
PPL Board	<ul style="list-style-type: none"> ➤ A go/no-go decision on class roll out from the User & Operations committee 	<ul style="list-style-type: none"> ➤ Provide a recommendation on class roll out
TOM SB	<ul style="list-style-type: none"> ➤ PPL Board will recommend roll out to TOM SB 	<ul style="list-style-type: none"> ➤ Provide a go/no-go decision on class roll out

Once the TOM SB has given the decision to 'go', Ebix will be instructed to -

- Promote code to production (where the roll-out is combined with a technical release)
- Set users to live
- Send out logons and passwords to new users.