Project Vanguard
Onboarding

November 2023

This material has been produced by Velonetic for the London insurance market as part of the Blueprint Two programme.

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Contents

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Overview

The Vanguard Project is an initiative which will identify & engage a small number of early adopters of the London Market Digital Processing Services (DPS) and deliver these services and products in a dedicated environment for testing and evaluation.
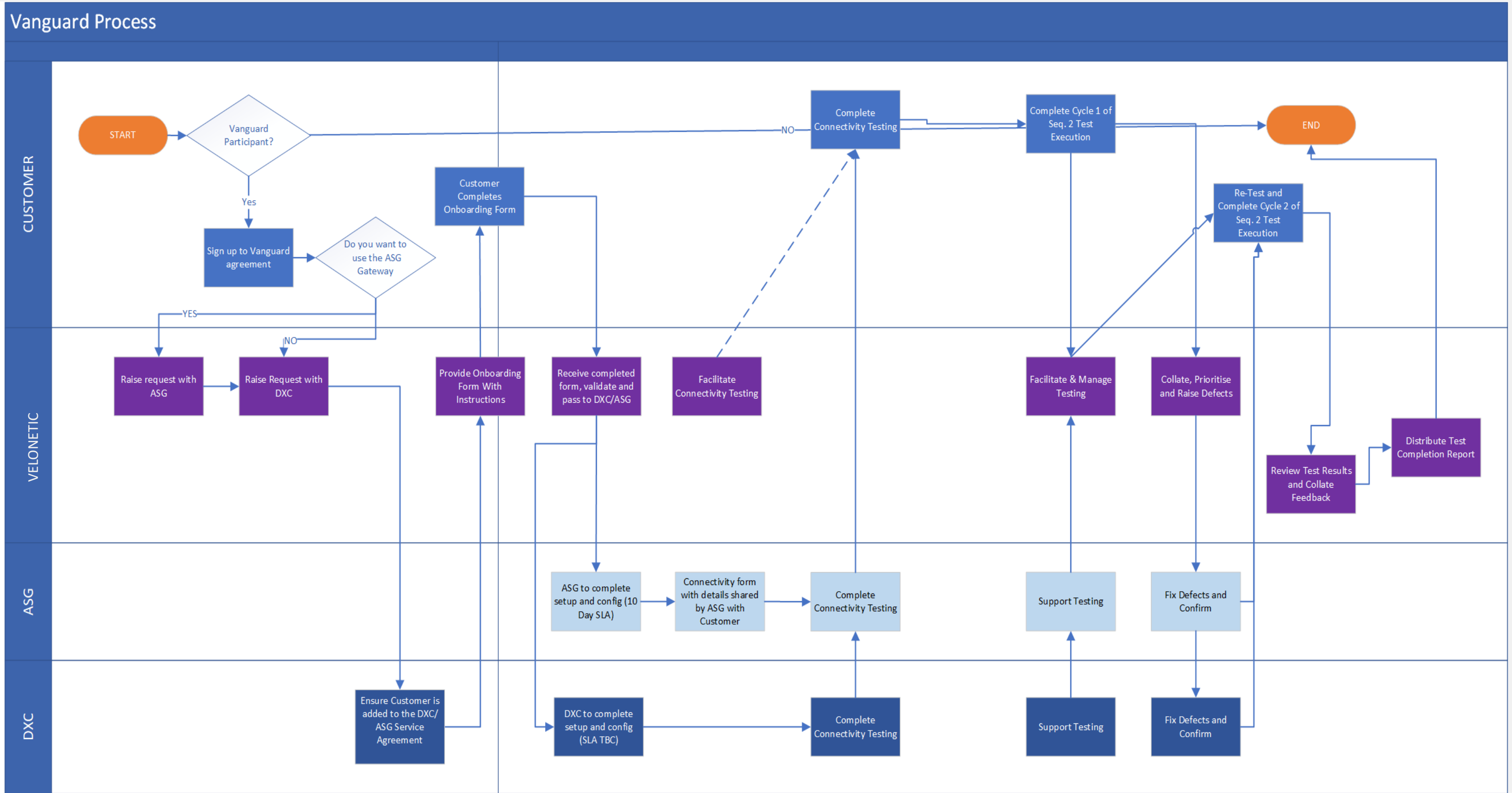
Main objectives
- Allow early access to the London Market DPS through a discreet, secure environment
- Facilitate seamless communication of digital and transitional messages between brokers and carriers
- Gather feedback and learnings on:
  - Performance
  - Usability
  - Functionality

Key features
- A dedicated Vanguard environment exclusively for testing: no live data and PII considerations
- Optional collaboration with Velonetic for testing using simulated messages
- Free services for participants, with future plans for paid services and self-service options
- Availability during UK business hours
- A phased rollout of service function and feature from May 2023 to January 2024
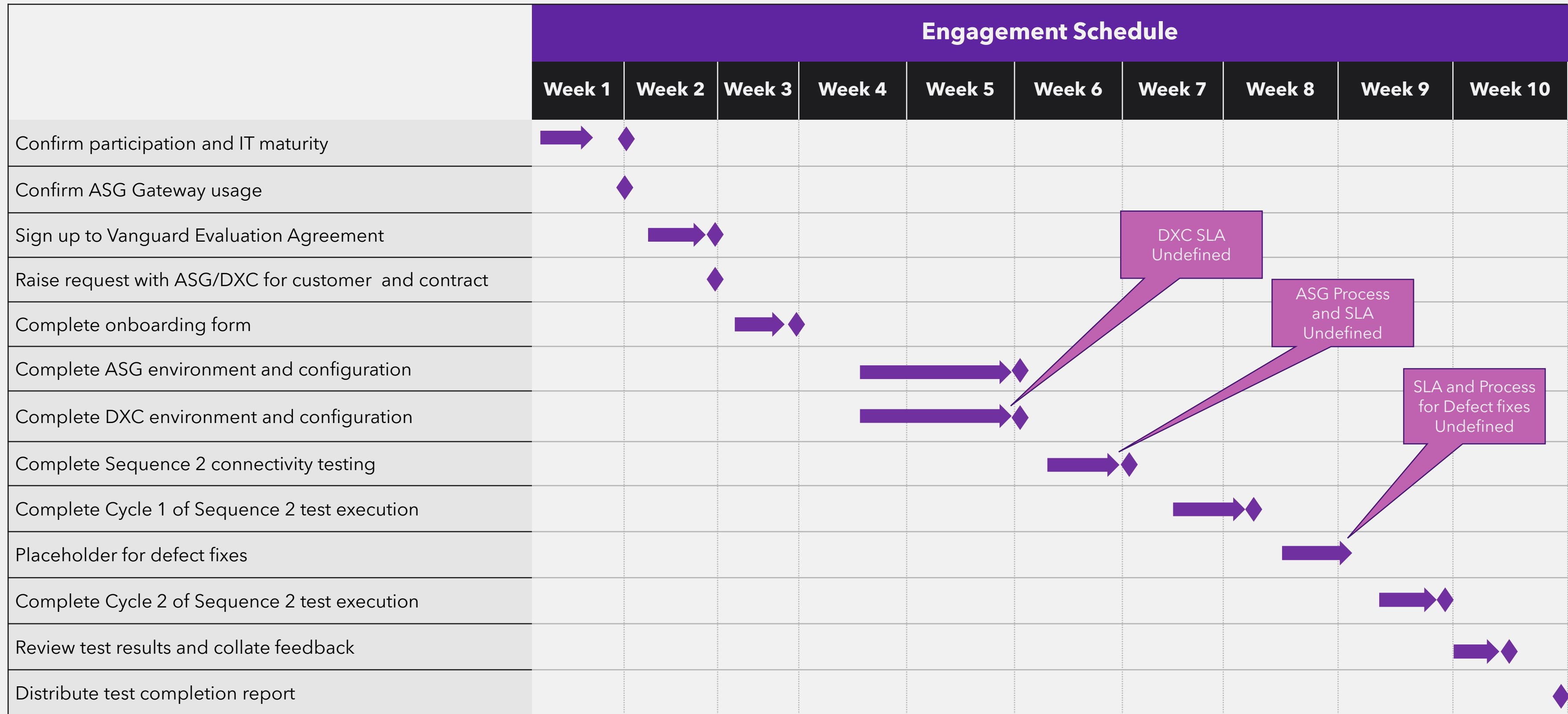- Targeting non-bureau (not using XIS or XCS services) digital insurance transactions

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Onboarding process flow

Onboarding steps and SLAs

STEPS	ACTION	OWNER	DESCRIPTION	SLA
1	Confirm customer participation in Vanguard testing	Velonetic	Vanguard Project Team will confirm customer's participation in Vanguard Testing Gather details from customer such as organisation details, market details, IT setup and maturity, ASG Gateways etc.	5 business days
2	Ensure customer signs up to Vanguard agreement	Velonetic	Vanguard Project Team will share the 'Vanguard Evaluation Agreement' for review and signatures	N/A - depends on customer's internal legal processes
3	Confirm if customer wishes to use the ASG Gateway	Velonetic	Vanguard Project Team will explain the role of the ASG Gateway and share guidance on how to access the ASG documents	N/A (Part of Step 1)
4	Raise request with DXC/ASG for customer onboarding	Velonetic	Vanguard Project Team will raise service requests with DXC and ASG on customer onboarding	1 business day
5	Ensure customer is added to the DXC/ASG service agreement	DXC	DXC to ensure customer is added to the DXC/ASG agreement addendum	1 business day
6	Send onboarding form to customer	Velonetic	Vanguard Project Team will provide instructions and share onboarding forms with customer and ensure customer completes the ASG section in the onboarding form (If applicable)	1 business day
7	Customer returns onboarding form to the Vanguard Project Team	Velonetic	Vanguard Project Team will verify the completed form and share with DXC and ASG teams as appropriate	1 business day
8	ASG to complete environment configuration	ASG	ASG will complete the environment configuration for the customer	10 business days from receipt of onboarding form

Onboarding steps and SLAs

STEPS	ACTION	OWNER	DESCRIPTION	SLA
9	DXC to complete environment configuration for customer	DXC	• DXC will complete the environment configuration for the customer • Includes party creation for portal users – actors, roles and an admin user for the customer	Estimate 10 business days
10	Share connectivity form containing details with customer	ASG	ASG will complete the environment configuration for the customer and share details	Estimate 10 business days
11	Complete Sequence 2 connectivity testing	DXC/ASG	DXC and ASG will test connectivity with the customer	Estimate 3 business days
12	Complete Cycle 1 of Seq. 2 Test Execution with Customer	Velonetic / Customer	Complete Cycle 1 of executing business test scenarios (see slide 8) with support from DXC and ASG teams	6 business days
13	Fix Defects discovered during Cycle 1 of Seq. 2 Test Execution	DXC/ASG	DXC and ASG to work with customers to fix defects (as applicable)	Defects prioritised within project backlog
14	Re-Test Fixes and Complete Cycle 2 of Seq. 2 Test Execution with Customer	Velonetic / Customer	Re-test fixes and complete Cycle 2 of executing business test scenarios (see slide 8) with support from DXC and ASG teams	5 business days
15	Review Test Results and Collate Feedback	Velonetic / Customer	Review test results, discuss intended functionality and usability requirements. Collate user comments, suggestions, and identified issues	3 business days
16	Distribute Test Completion Report	Velonetic	Distribute test completion including test coverage, defect details, recommendations, and conclusions	1 business day

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Engagement schedule for Sequence 2

	Engagement Schedule									
	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10
Confirm participation and IT maturity	➡◆									
Confirm ASG Gateway usage		◆								
Sign up to Vanguard Evaluation Agreement		➡◆								
Raise request with ASG/DXC for customer and contract			◆							
Complete onboarding form			➡◆							
Complete ASG environment and configuration				➡◆						
Complete DXC environment and configuration				➡◆						
Complete Sequence 2 connectivity testing					➡◆					
Complete Cycle 1 of Sequence 2 test execution						➡◆				
Placeholder for defect fixes							➡			
Complete Cycle 2 of Sequence 2 test execution								➡◆		
Review test results and collate feedback								➡◆		
Distribute test completion report									◆	

DXC SLA Undefined

ASG Process and SLA Undefined

SLA and Process for Defect fixes Undefined

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Business test scenarios

Business Scenario Title	Parties Broker (B), Carrier (C) Velonetic (V)	Test Data	Description
Original Premium (TA) by Broker (B)	B -> C	Risk details to be shared with Carrier	Original premium is generated, and is pushed through ASG, the EBOT passes through V to the carrier where the TA can be acknowledged by the carrier
Financial Accounting of TA	B -> C	FA EBOT with Carrier DUNS	An FA is generated by the broker, this is pushed through ASG, passes through V through to the carrier who can then acknowledge it
Adjustment Premium (AP)	B -> C	AP EBOT with Carrier as Insurer	The broker generates an adjustment premium and submits it. This EBOT is passed through ASG to the carrier where the carrier acknowledges it
Query Response & Resolution	B -> C	Carrier Query details, Broker Response	A query EBOT is generated by the carrier, this is pushed through ASG, passes through V through to the broker who can then acknowledge it
Financial Accounting for AP & Query	B -> C	Broker to have FA EBOT with Carrier DUNS as Insurer	An FA is generated by the broker, this is pushed through ASG, passes through V through to the carrier who can then acknowledge it
Original Premium (TA) by Velonetic	V -> C	V to share risk details with Carrier	Original premium is generated by V test broker, and is pushed through ASG by the V, the EBOT passes through V to the carrier where the TA can be acknowledged by the carrier
Financial Accounting of TA by Velonetic	V -> C	V to have FA EBOT with carrier	An FA is generated by V test broker, this is pushed through ASG, passes through V through to the carrier who can then acknowledge it
Claim Notification (FNOL)	V -> C	V to have Claim Movement (ECOT) for FNOL	The V test broker generates a Claim Movement (FNOL), the ECOT then passes through ASG then onto the carrier where the carrier can acknowledge the claim
Claim Movement Reserve	V -> C	V to have Claim Movement (ECOT) for Reserve	The V test broker generates a Claim Movement (Reserve), the ECOT then passes through ASG then onto the carrier where the carrier can acknowledge the claim
Claim Movement (Partial Settlement)	V -> C	V to have Claim Movement (ECOT) for partial settlement	The V test broker generates a Claim Movement (Partial Settlement), the ECOT then passes through ASG then onto the carrier where the carrier can acknowledge the claim

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