



## C360 LOMBARD TO HOLLARD BOOK MOVE – PROCESS DOCUMENT

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## Document History

Version	Date	Author	Status	Description of Document
0.1	2025-08-25	Adelle Johnston & Nadine Reinecke	Complete	Initial Draft
0.2	2025-08-27	Paul Marshall	Complete	Updated Hollard Changes

## Executive Summary

This document outlines the steps required to facilitate the migration of policies from Lombard to Hollard within the C360 platform. The process is to be executed in collaboration with Hollard, the client (broker), and the Cardinal C360 Team.

## Type of Document

### Process & Execution

## Reviewers

Name	Role	Company
Paul Marshall	Executive – Operations	Cardinal
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Tanya Massyn	Hollard Partnerships and Data	Hollard

## Approvers

Name	Role	Company
Paul Marshall	Executive – Operations	Cardinal
Geevashini Naidoo	Strategic Operational Lead – Servicing and QA	Cardinal
Tanya Massyn	Hollard Partnerships and Data	Hollard

## Business Requirements

To assist with the migration of policies the Bulk Copy/Move (Playpen) functionality will be used, this is to be initiated by a Cardinal C360 team member and the client, this is designed to assist with the mass transfer of policies from one insurer/product to another within the same brokerage.

This process guide should be used in conjunction with the C360 Bulk Copy to Quote (Playpen) User Manual.

## Strategic Value

This migration process is a critical enabler of business continuity and operational efficiency within the brokerage environment. By leveraging the C360 Bulk Copy/Move (Playpen) functionality, the transition of policies from Lombard to Hollard is streamlined, reducing manual effort, minimising risk of error, and ensuring data consistency.

The collaboration between Hollard, the client (broker), and the Cardinal C360 Team ensures alignment across stakeholders, supporting a smooth and auditable migration. Ultimately, this process supports the brokerage's ability to adapt quickly to insurer changes while maintaining high levels of service to policyholders.

## Migration Process Steps

### Step 1: Project Planning

A project kick-off meeting must be arranged with the Client, Insurer (Hollard), and Cardinal to:

- Define the timelines and expectations.
- Confirm the insurer and product(s) to be moved.
- Identify any required involvement from the C360 Products Team.

Note: For optimal results, it is recommended to migrate to a product with a replicated structure.

Hollard will address the Barnowl related requirements in a separate Questions and Answers (Q&A) document.

## Step 2: Insurer & Product Setup

Responsible: Cardinal Products Team

A Jira ticket must be created to initiate the following actions:

1. Create New Insurer Profile
  - o Add The Hollard Insurance Company Limited (LB) to the Products Database.
2. Copy Existing Lombard Products
  - o From: Lombard Insurance Company Limited (Binder)
  - o To: The Hollard Insurance Company Limited (LB)

### Products to be copied include:

- o Lombard Body Corporate 2024.8
  - o Lombard Commercial 2024.10
3. White Label / Bespoke Products
    - o Client and Hollard to confirm if any such products exist.
    - o These products will be copied directly within the client's C360 environment, if applicable.

## Step 3: Testing & UAT – Product Setup Sign-off

Responsible: Cardinal Products Team & Clients (Brokers)

- Deploy the new Hollard (LB) insurer and associated products to the client's UAT environment, if available.
- All white label/bespoke products to be copied within the client's own C360 system.
- Client/broker must review and sign off on all newly created products, including:
  - o Fees
  - o Sub-agent commissions
  - o Wordings
  - o Disclosures
  - o Attachments
  - o etc

#### Step 4: Bulk Copy/Move (Playpen) Executable

Responsible: Cardinal Client Experience Executive (CEE)

Ensure the client has access to the correct version of the Bulk Copy/Move (Playpen) executable compatible with their C360 version.

- The .exe file is available via the Cardinal FTP site.
- Ensure the relevant users have access to the folder containing the executable.

#### Step 5: Bulk Policy Transfer – Lombard to Hollard

Responsible: Cardinal Client Experience Executive (CEE) & Client (Broker)

- Preparation
  1. Print a full list of all policies to be migrated.
  2. Confirm new products are activated and available under the relevant brokerages.
  3. Conduct an initial test migration by copying a single policy to a quote and manually moving it to the new insurer/product to verify accuracy.
  4. Launch the Bulk Copy / Playpen executable.
- Check List (Pre Migration)
  1. Create the insurer profile - The Hollard Insurance Company Limited (LB)
  2. Copy all relevant products from Lombard to Hollard
  3. Conduct product testing and validations.
  4. Signoff of the product setup in the Client's C360 Database
  5. Hollard to provide the new Barnowl code that will be linked to the new Hollard Insurer and products for their data extracts.

Important: It has been agreed that all Lombard policies will be moved to Hollard by 1 October 2025.

All annual renewals effective from 1 October onwards must be reloaded under the approved Hollard Binder or Outsourced products.

Note: The Lombard Insurer and associated products will be deactivated in C360 effective 1 October 2025 to prevent new business or renewals from being processed.

- Check List (Post Migration)

Responsible: Client (Broker)

Users must conduct live tests by transferring a small batch of policies, effective 1 October 2025. The original policies must be cancelled as part of this process.

1. Premiums on copied policies must match 100% including Sasria with those of the cancelled policies. The only exceptions to this would be pro rata annual policies, where differences may apply due to proration.
2. Excess, Wordings, Fees and Commissions are correct.
3. Policies have been cancelled correctly under the Lombard Insurer (No pro-rata refund)
4. If selected, ensure that VAPS are correctly linked to the new policy and deactivated on the cancelled policy.

- Target Completion

The entire migration process must be finalised by ~22 September 2025, to allow for a seamless go-live date of 1 October 2025.

## Dependencies

1. Client Readiness: The broker must confirm the list of policies to be migrated and provide necessary approvals.
2. Product Mapping: Accurate mapping between the existing Lombard product and its corresponding Hollard version must be completed prior to initiating the migration.
3. Platform Access: All involved parties (The client, and Cardinal C360 team) must have appropriate access to the C360 platform and Playpen functionality.

4. Data Integrity: Source policy data must be verified and up to date to ensure successful migration.
5. C360 Environment Stability: The C360 platform, including the Playpen environment, must be fully operational during the migration process.
6. User Availability: The users in conjunction with the Cardinal CEE must avail themselves for the process along with the C360 Bulk Copy to Quote (Playpen) User Manual for reference throughout the process.

## Out of Scope

Anything not stipulated in this document will be deemed out of scope and will result in a change request.

- Policy Data Clean-Up: Any required data cleansing or correction of policy information prior to migration must be completed by the client before initiating the process.
- Manual Policy Adjustments: Individual policy edits or adjustments post-migration are not covered under this process and are the responsibility of the client.
- System Enhancements or Development: This process does not include any custom development, feature changes, or enhancements to the C360 platform.
- Training or End-User Support: User training beyond what is provided in the C360 Bulk Copy to Quote (Playpen) User Manual is not part of this initiative.
- Third-Party System Integration: Integration with or updates to external systems outside of C360 are not included in this process.