



# Getting Started

## Life, Annuity & Health Implementation

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# Getting Started

- What are you doing?
- Who are you doing it with?
- How did you decide to use ACORD?
- What do I do next?
- Let's hear some examples...

We are not alone 😊

# Agenda

- Getting Started
- Implementation Process Guideline
  - Practical Steps: 3 Step Approach
- From the Beginning
- Resources: ACORD / Other
- Project Perspectives
  - Start-Up / Implementation / Maintenance
- Lessons Learned & Planning Ahead

# Getting Started

- I have an idea...
- Decisions made - now what?
- Moving from concept to reality

# Implementation Process Guide

- Practical Steps
- Getting Started / Internal Prioritization
- Make Contact
- Three Step Approach
  - Organizational Steps
  - Functional Steps
  - Technical Steps
- [http://www.acord.org/Standards/implementation\\_guidance.aspx](http://www.acord.org/Standards/implementation_guidance.aspx)

# Step 1 of 3: Organizational

- Validate joint objectives & goals
- Identify “business champions”
- Involve Business & IT
- Define Shared Schedule
- Establish schedule for work & status
- Estimate resource requirements

## Step 2 of 3: Functional

- Define business scope of implementation
- Develop & maintain business case
- Develop functional spec
- Validate data requirements
- Map data
- Refer to ACORD resources for guidance

# Step 3 of 3: Technical

- Conformance to ACORD
- Agree to protocols (e.g. SOAP, etc.)
- Non-structured data (e.g. FTP, etc.)
- 3 Phase Delivery
  - Test Period (controlled environment)
  - Pilot Period (concurrent to production)
  - Production / Maintenance

# From the beginning...

- Seriously considering ACORD
- Using ACORD for the first time
  - One transaction
  - One business partner
- Planning Ahead (Re-Use of prior work)
  - Adding other partners
  - Adding other ACORD transactions
  - Building ACORD into the architecture



# Stepping through the process

- Defining objectives and scope
- Identify ACORD resources
- Getting the project under way
- Implementing the solution
- Ongoing maintenance and follow-up

# Defining objectives and scope

- Objectives
  - Seriously considering the use of ACORD Standards
  - One message, one business partner, using ACORD for the first time
  - Adding another ACORD message
  - Building ACORD standards into the architecture

# Defining objectives and scope

- **Scope**
  - One or two people submitting a recommendation
  - Small project team delivering a closed system
  - Multiple project teams across divisions and/or companies
  - Major ongoing effort

# Defining objectives and scope

- Two examples
  - Example 1: A small to medium project
    - Objective
    - Scope
  - Example 2: A large to medium project
    - Objective
    - Scope

# Defining objectives and scope

- **Two examples**
  - **Example 1: A small to medium project**
    - Objective: One file translated to ACORD
    - Scope: Small project team
  - **Example 2: A large to medium project**
    - Objective: Transform proprietary formats to the ACORD format
    - Scope: Several different corporate areas involved with business and technical specialization

# Identify ACORD resources

- An introduction to ACORD resources
- Resources for the occasional user
- Resources for the daily user
- Other resources

# Resources: ACORD

- **Documentation**
  - Standards & Guides (Forms, AL3, XML)
- **Education / Training Materials**
- **Experience / Insight**
  - Case Studies
  - Implementation Reports (OARS)
- **Services & Support**
  - Testing & Certification Facility (TCF)
  - ACORD Staff / Industry Counterparts



# Resources: [www.acord.org](http://www.acord.org)



Insurance Data Standards

[Register](#) [Why Register](#) [Sign In](#)

[About](#) [Standards](#) [Advocacy](#) [Publications](#) [News](#) [Events](#) [Global Markets](#) [Education](#) [Contact](#)

 [Get Forms](#)

- Value of Standards
- Intellectual Property Rights Policy
- Life, Annuity & Health
- Property & Casualty/Surety
- Reinsurance & Large Commercial
- Forms
- Implementation Guidance
- Governance Committees
- Working Groups
- Download Standards
- Testing & Certification Facility (TCF)
- Standards Maintenance & Process
- Standards Calendar

- Cross Domain
- Life, Annuity & Health
- P&C/Surety AL3
- P&C/Surety XML
- Reinsurance and Large Commercial
- Tech Talk
- Human Resources

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# Resources: ACORD Documentation

- **Standards & Implementation Guides**
  - Forms
  - XML
- **Delivery / File Access**
  - Public
  - Members' Only

# Resources Within ACORD

- **ACORD Staff**
  - **Cliff Chaney – LAH Program Director**
  - **Yolanda Austin – Program Manager**
  - **Brian Marable – Program Manager and Member Relations**

# Resources Beyond ACORD

- ACORD Teams (collaboration area)
- Solution Provider Directory
  - [http://www.acord.org/spd/spd\\_search.aspx](http://www.acord.org/spd/spd_search.aspx)
- Tools
  - XML “aware” tools (e.g. editors, etc.)
  - Validation tools (e.g. XSLT, etc.)
  - Search Engine “XML tools”

# Project Start-Up

- Using ACORD resources to get the job done...during:
  - Project inception
  - Requirements gathering and definition
  - Choosing a standard and version
  - Programming and testing
  - Discovering gaps in the standard

# Implementation

- **Certification**
  - ACORD
  - Non-ACORD
- **Communication**
  - Sharing your success story
  - Leading the industry
  - More attractive trading partner

# Maintenance and Follow-up

- Keeping up with the times
  - Changes from within...
  - And without...
- Handling the postponed tasks

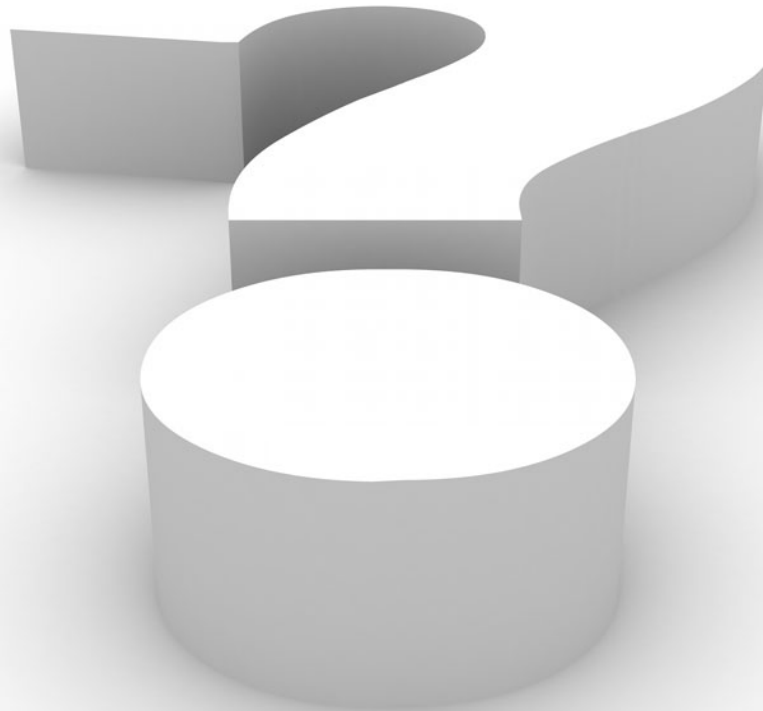
# Lessons Learned & Planning Ahead

- Staying up to date with ACORD
  - Version control
- Monitoring industry trends
- Shaping the future

# Conclusion

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[www.acord.org](http://www.acord.org)





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