

First 120 days

	Who	May	Jun	Jul	Aug
Phase 1 - Transition					
Mr Price appoints Aon	MRP	●			
Aon mobilises its team	Aon	●			
MRP/Aon agree terms of Aon’s appointment including SLA, and KPI’s	MRP/Aon	●	●		
MRP/Aon agree lines of communication and key milestones in Transition plan	MRP/Aon	●			
Aon advises insurers of change of broker and starts information gathering process	Aon	●			
Aon agrees handover plan with incumbent broker including transfer of WIP	Aon	●	●		
Weekly WIP conference calls	MRP/Aon	●	●	●	●
Phase 2 - New Service Plan implemented					
Structure of team and on-going lines of communication agreed	MRP/Aon	●	●		
Discussions to understand culture, personalities and key service requirements and agree short/medium term goals	MRP/Aon		●	●	
Itinerary of visits agreed	MRP/Aon		●	●	
Implementation of Aon IT to streamline administration (e.g. cert issue)	Aon			●	●
Claims protocols agreed	Aon			●	
Phase 3 - Technical Review					
Obtain policies from existing insurers/undertake initial technical audit	Aon	●	●	●	
Review policies against lenders requirements	Aon		●	●	●
Submit initial high-level report on technical audit to Mr Price. Identify key deficiencies and enhancements available	Aon				●
Key amendments to existing policies submitted to insurers, if required.	Aon		●	●	●