

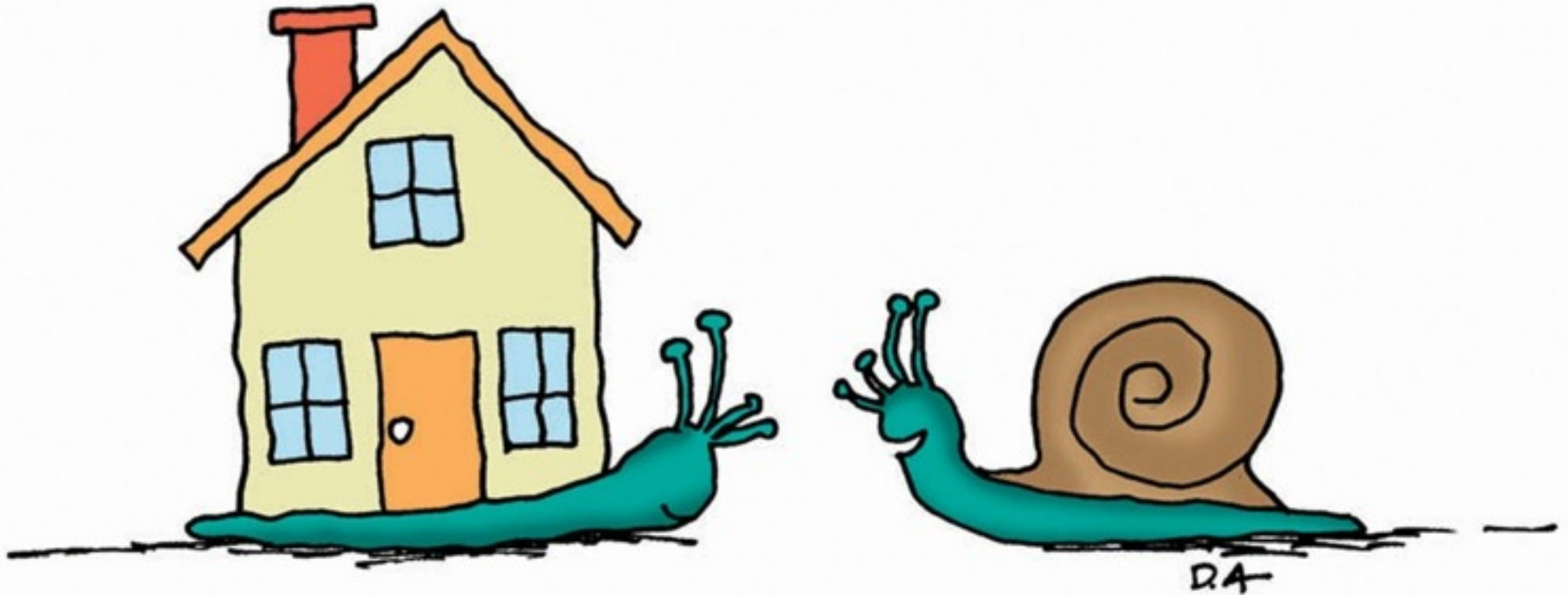
# Participative Change Management with **Openflexo** through Concurrent Visualization



Dominique Snyers  
Founder  
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**Agile Birds**  
Pulling the team together - [www.agilebirds.com](http://www.agilebirds.com)

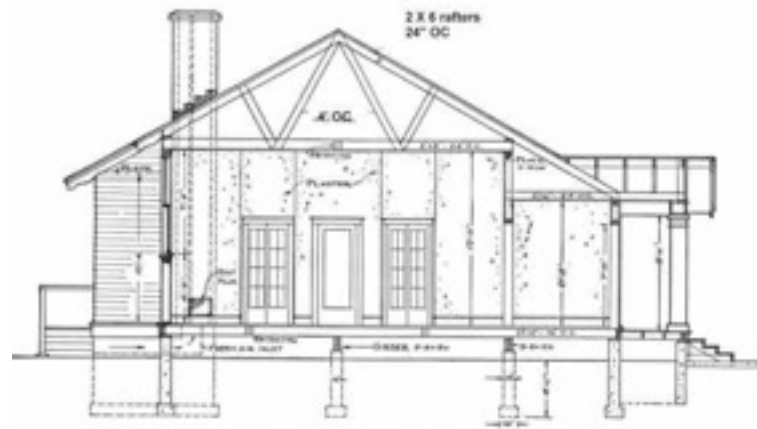
# How do we renovate a house ?



“Love your renovations.”



- **Ask an architect to map the existing house.**



Sections View



- **Iterate:**
  - Use the blueprint to move things around, add new parts, ....
  - Discuss the changes.
- **Reach an agreement.**
- **Start renovation.**

# To Be Successful Change Management Must



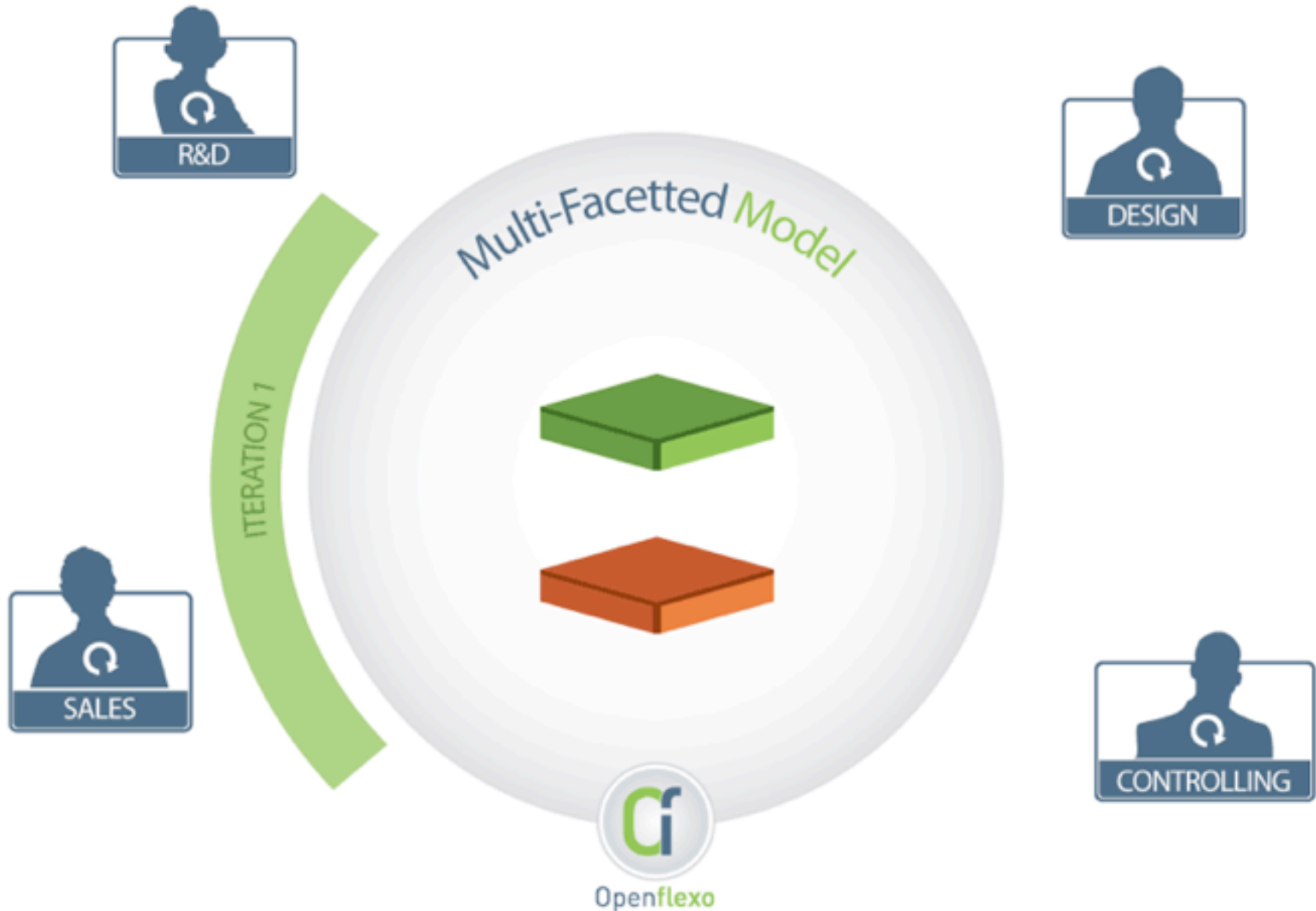
- Be participative
- Rely on cross functional internal forces.
- Share a visualization of the enterprise business changes.
- Define and communicate the objectives.
- Bring iterations of quick and visible results.
- Empower the individuals to initiate continuous changes.



- Successful Change Management
- **Change Management with Openflexo**
- Openflexo Platform
- Openflexo Deliverables
- Openflexo Mission Packages

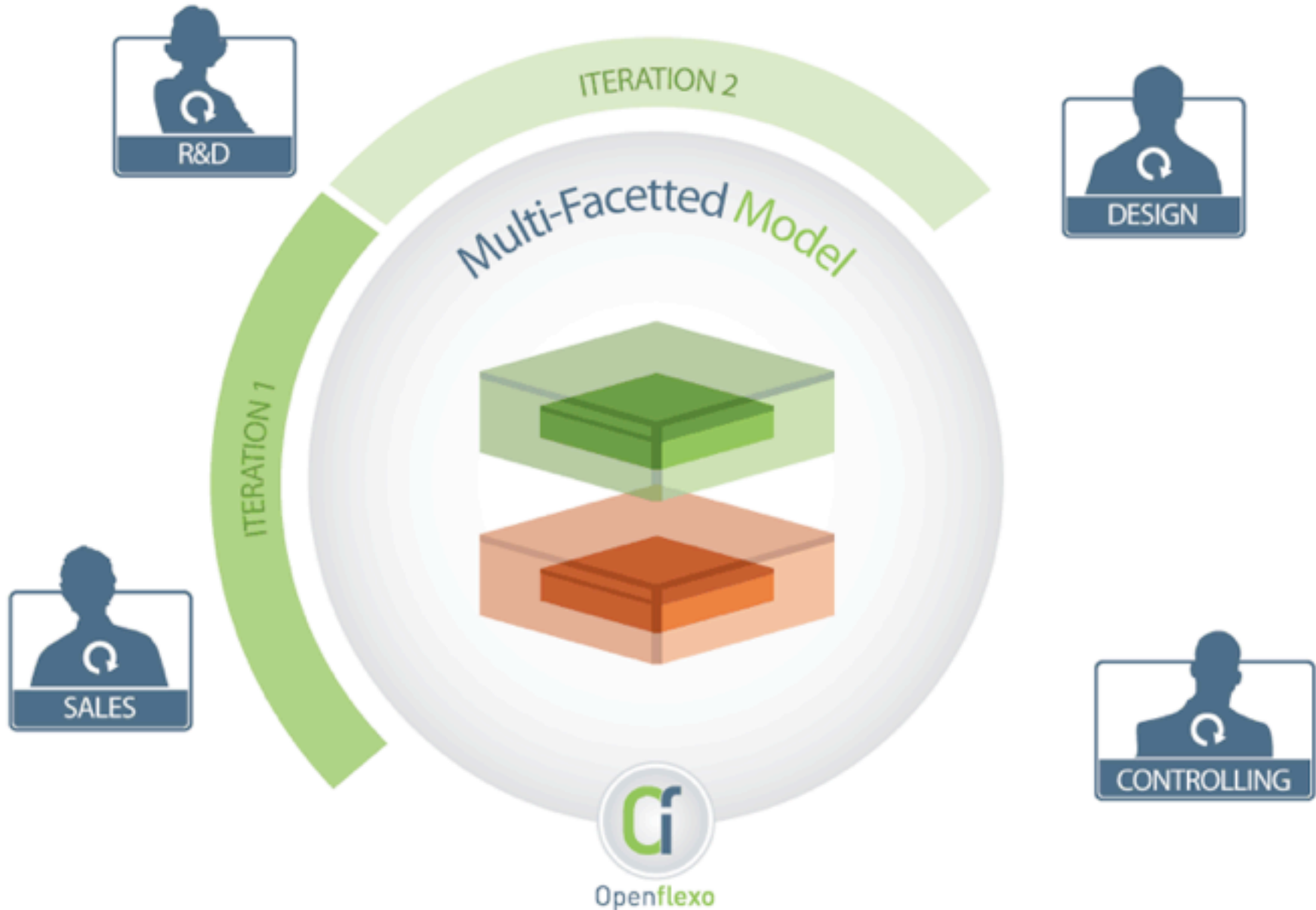


## A Shared Blueprint Visualization



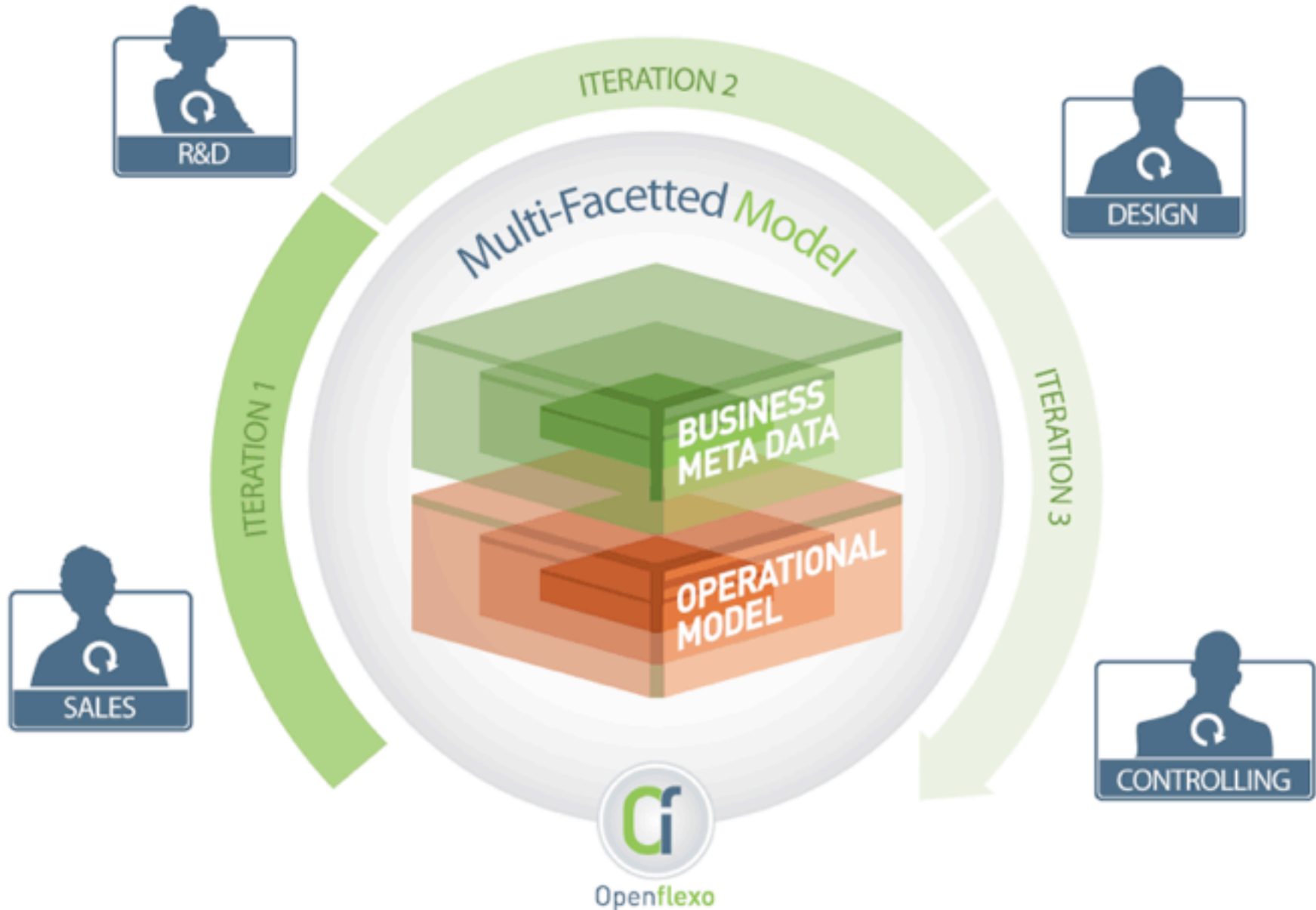


## A Shared Blueprint Visualization





## A Shared Blueprint Visualization





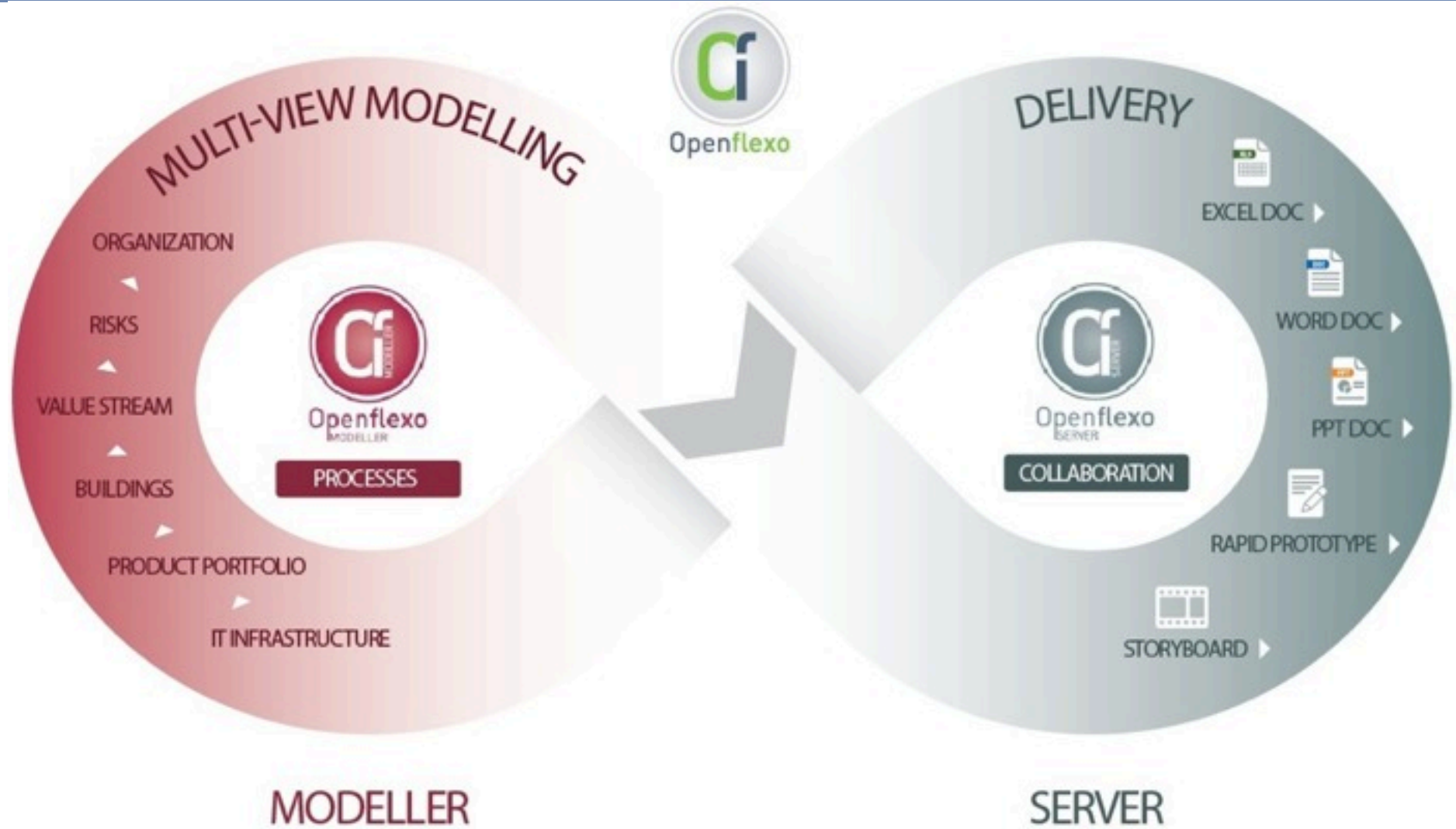


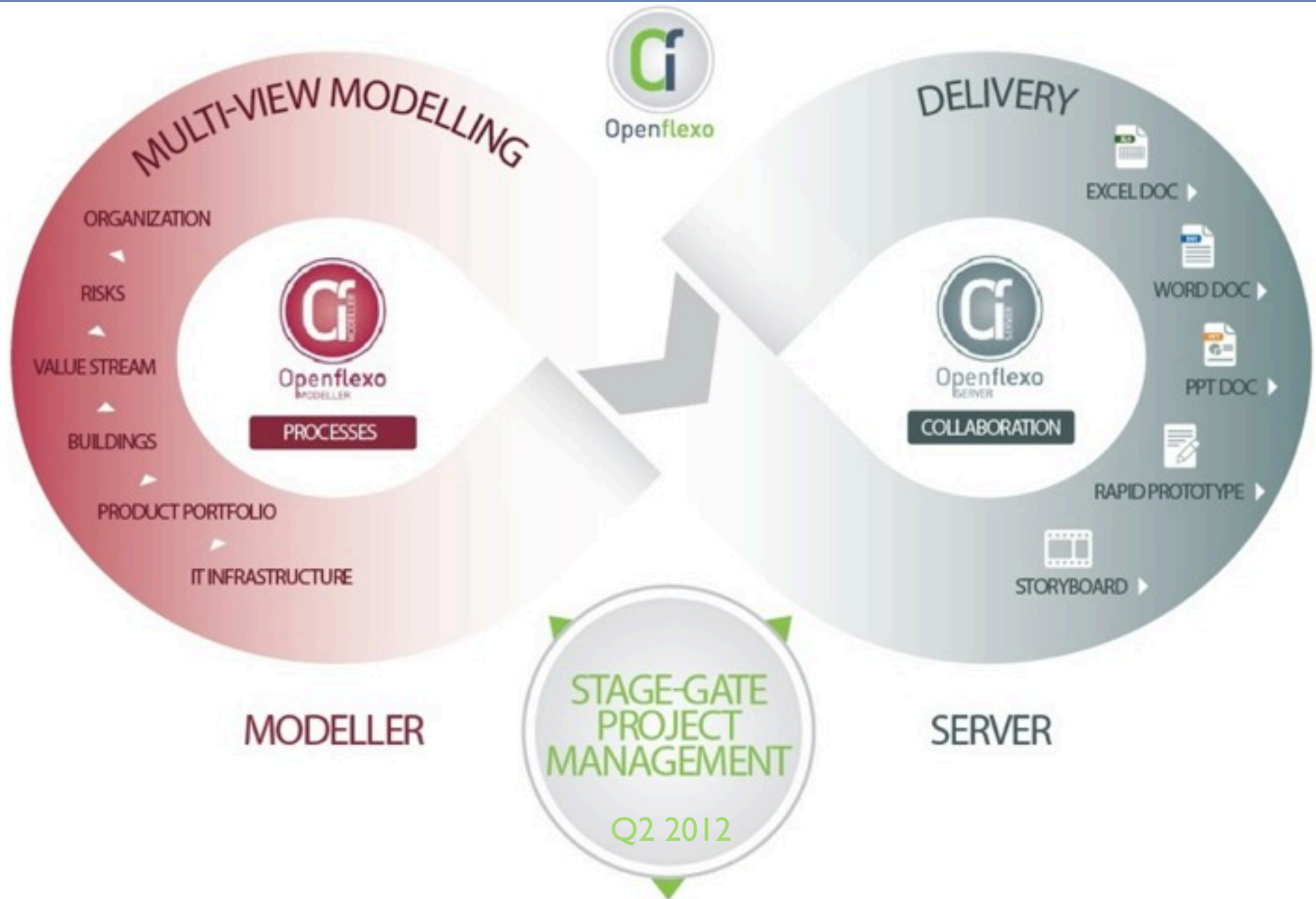
## From agile development or concurrent engineering to agile service delivery with Openflexo

- People engagement through short cycles of frequent deliveries.
- Coordination through shared visualization.
- Clear definition and communication of objectives.
- Business solutions preferred to expert solutions.

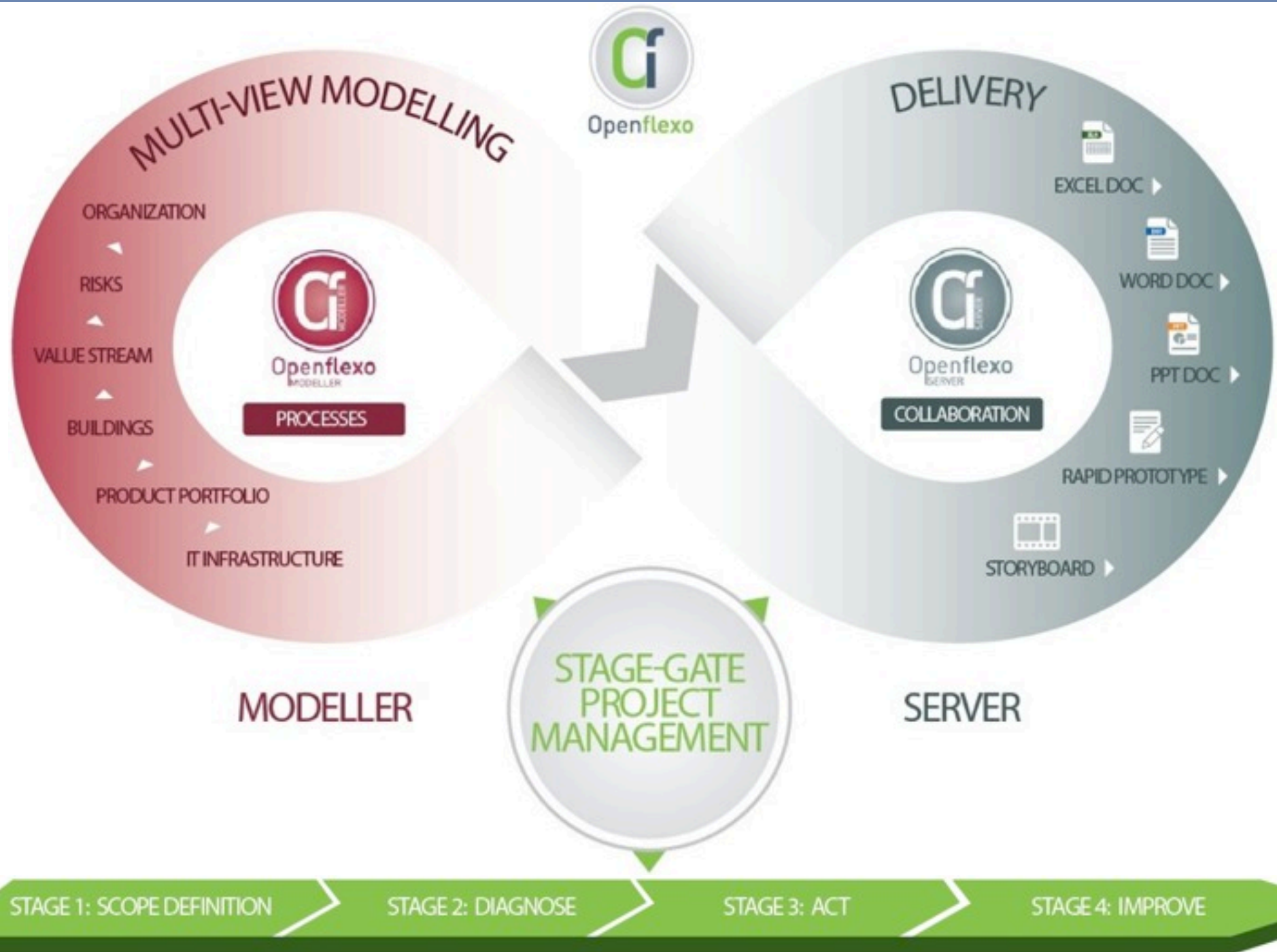


- Successful Change Management
- Change Management with Openflexo
- **Openflexo Platform**
- Openflexo Deliverables
- Openflexo Mission Packages





# Openflexo Platform to Deliver Services



# Openflexo is Now an Open Source Project



Download sources and executables at: [www.openflexo.com](http://www.openflexo.com)

Technology recognized by experts: **Gartner's BPM Cool Vendor 2009**

Example of current projects running on Openflexo:



BNP Paribas Fortis



## Why open sources?

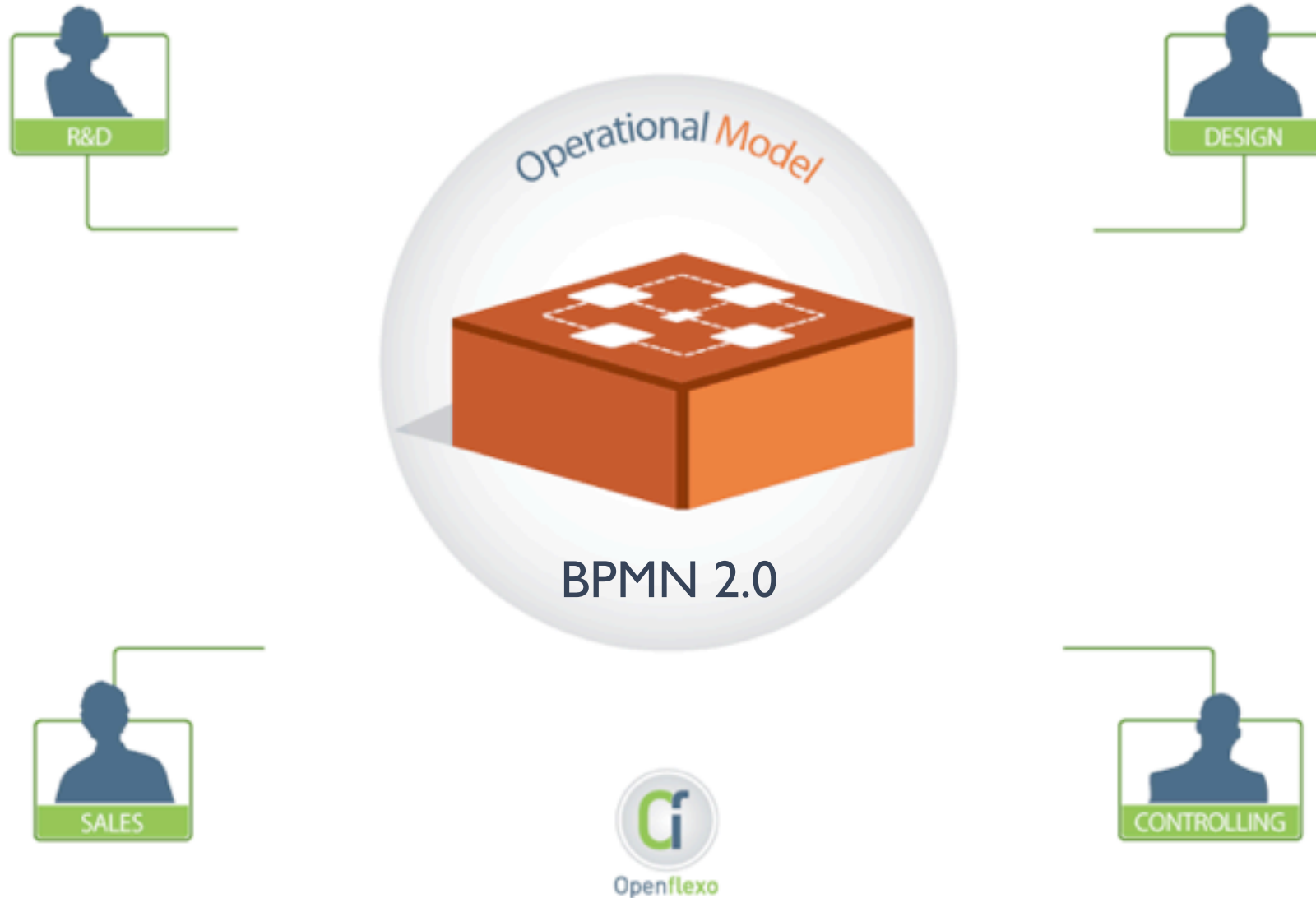
- Lower the entry barrier.
- Benefit from an ecosystem of users - partners - integrators.
- Enlarge developer basis.
- Focusing on content and change management missions.

Pulling the team together - [www.agilebirds.com](http://www.agilebirds.com)

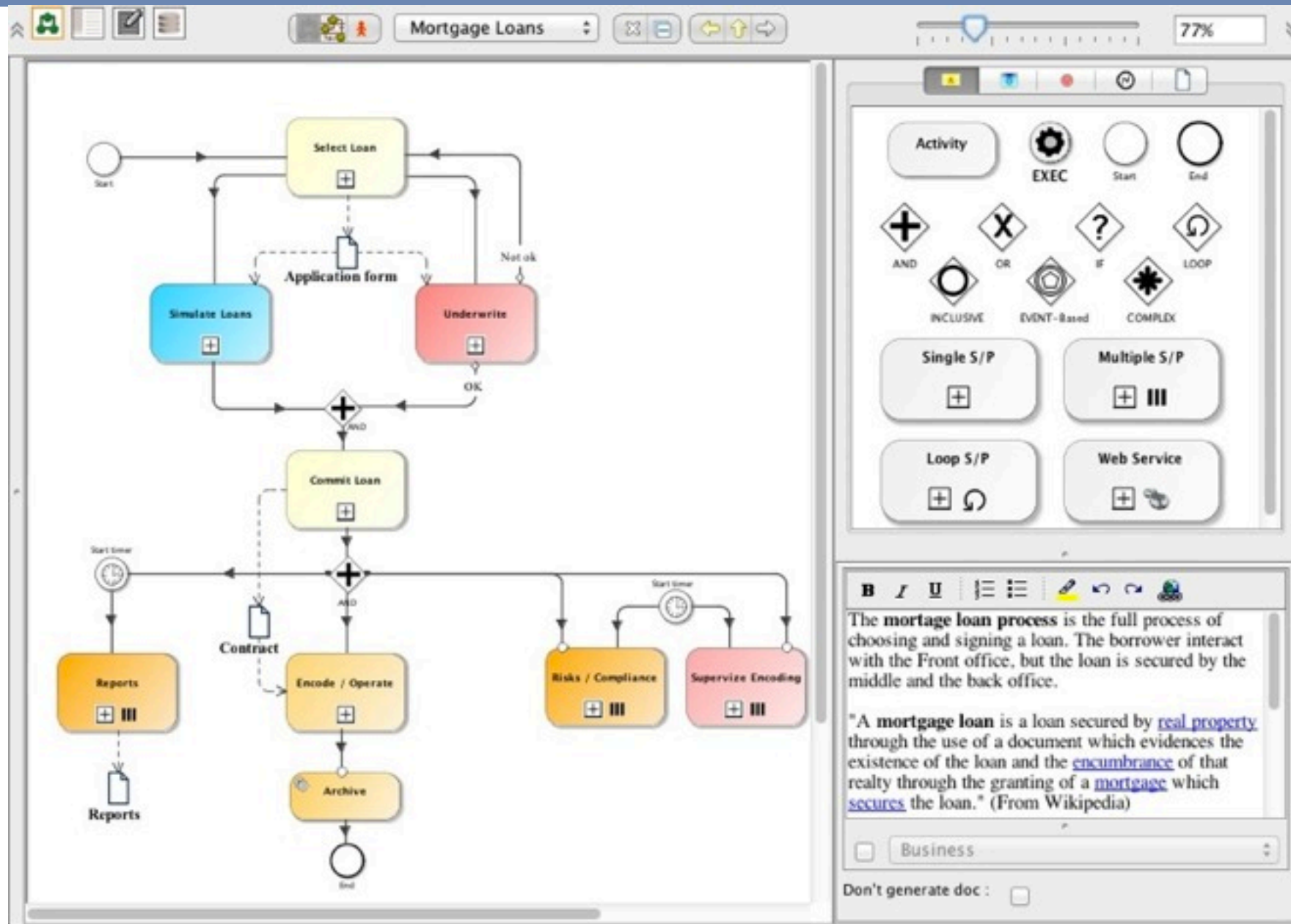




# The Multi-faceted Openflexo Model

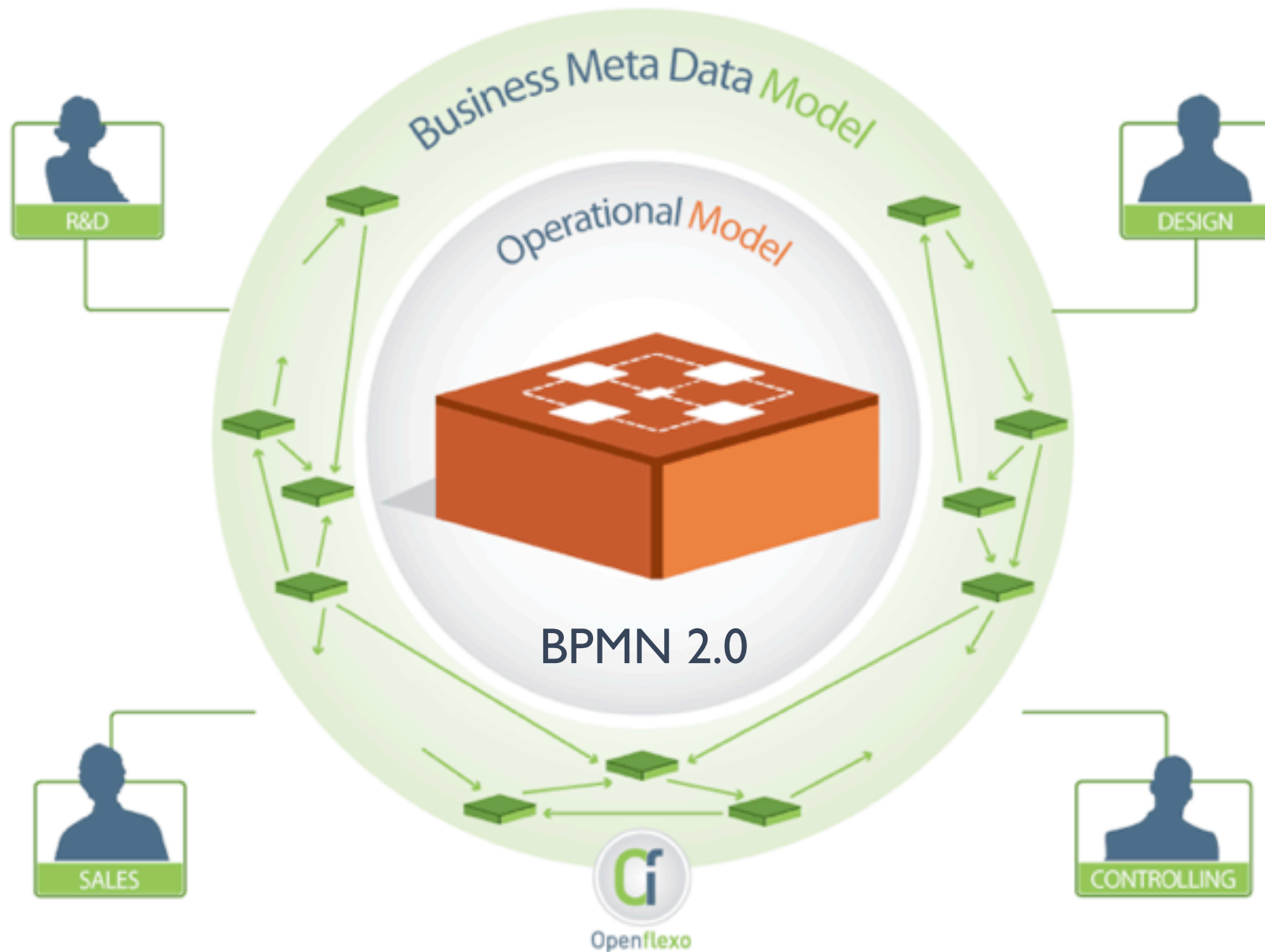


# Openflexo Workflow Editor

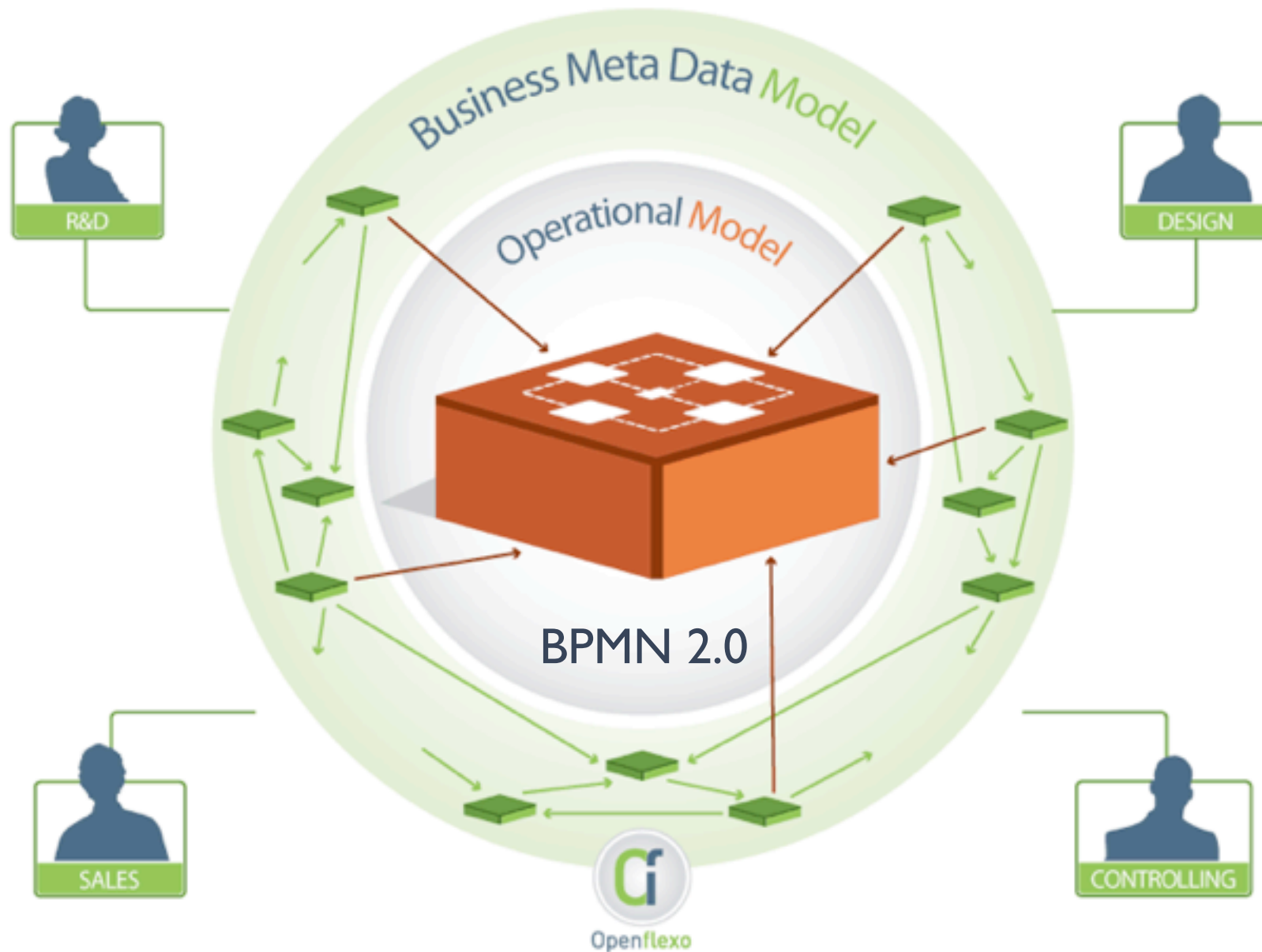




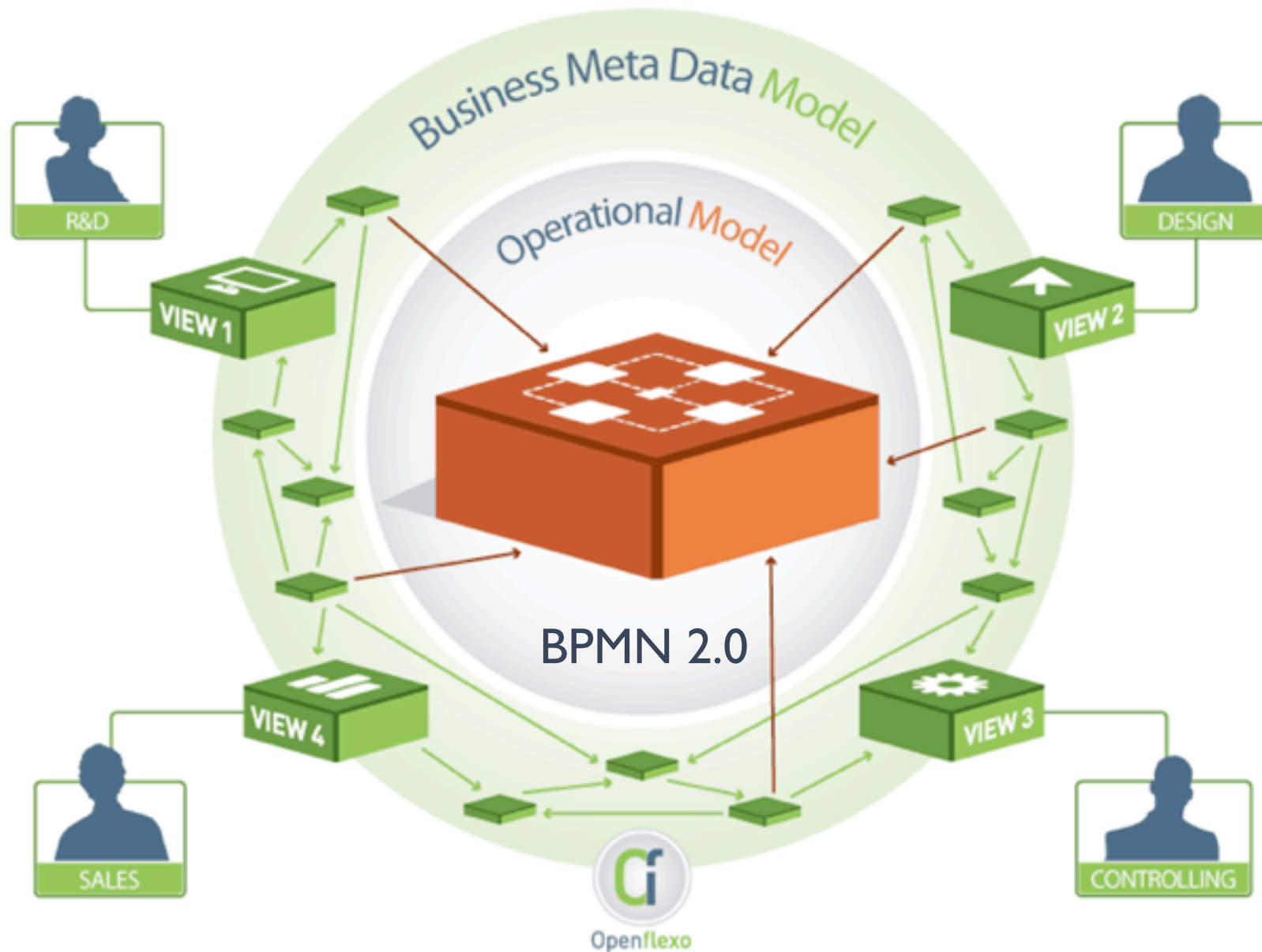
# The Multi-faceted Openflexo Model

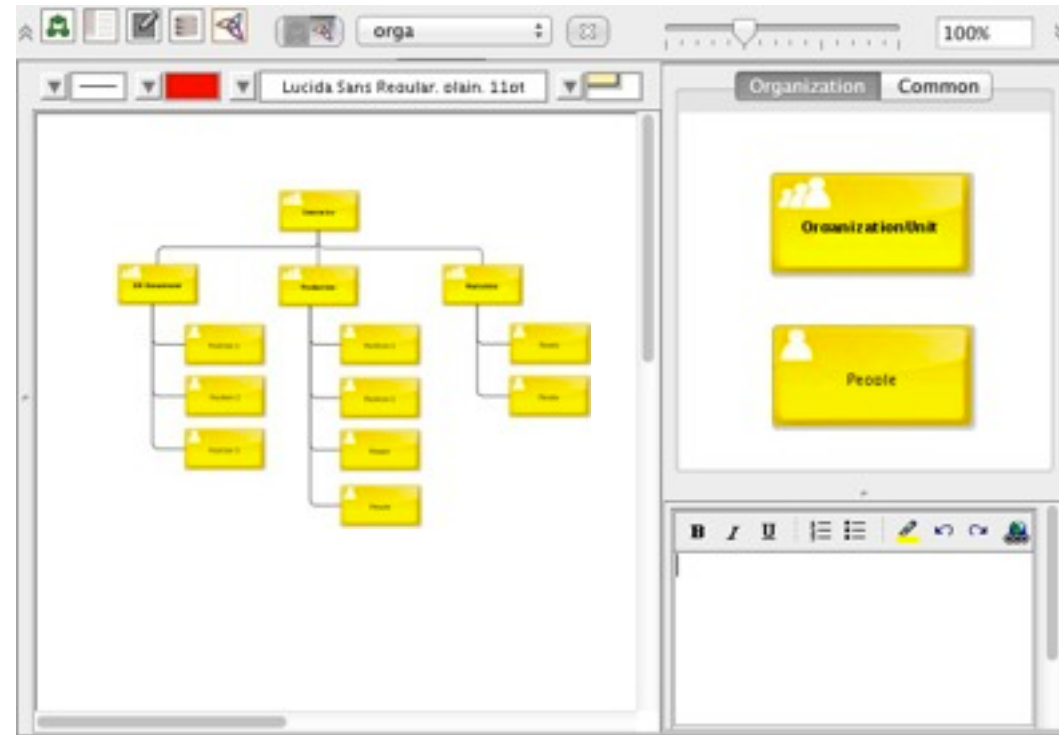


# The Multi-faceted Openflexo Model

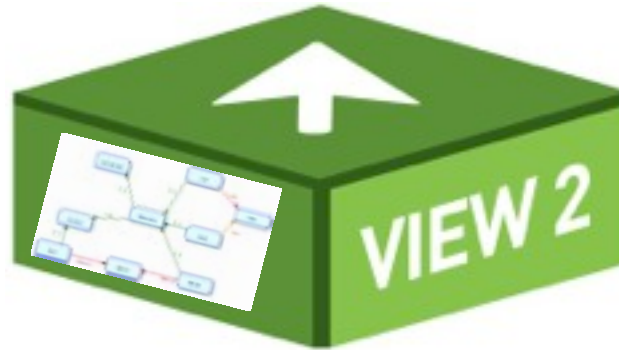


# The Multi-faceted Openflexo Model





- Visual representation of meta-data (underlying graph of concepts or ontologies)
- Instantiating meta-data by drag-dropping elements from a palette.
- Multiple interrelated views.



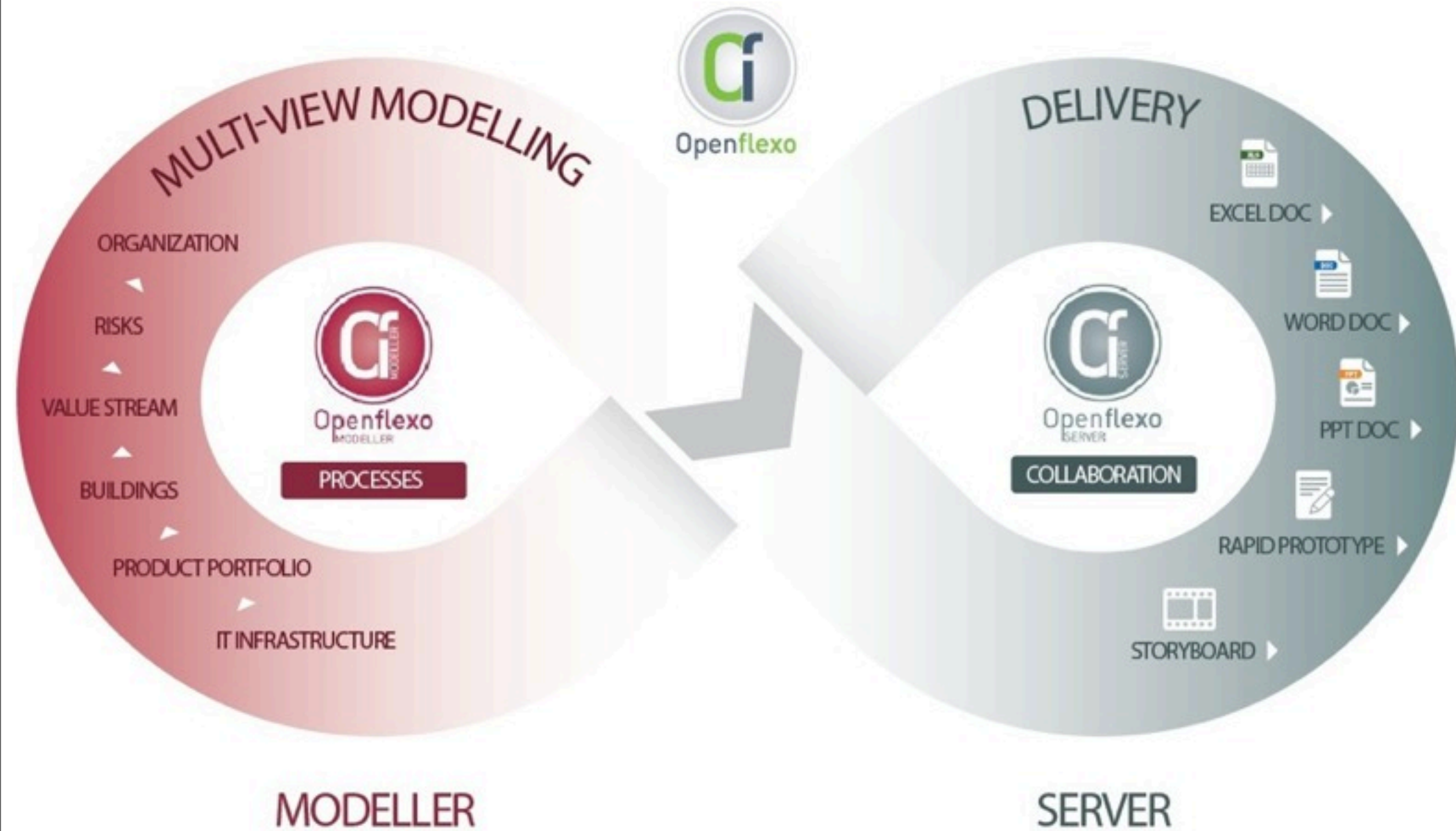
Viewpoints define the views by glueing together:

- Owl ontologies defining the meta model.
- Graphical representation of concepts.
- Actions between graphical objects and ontology.



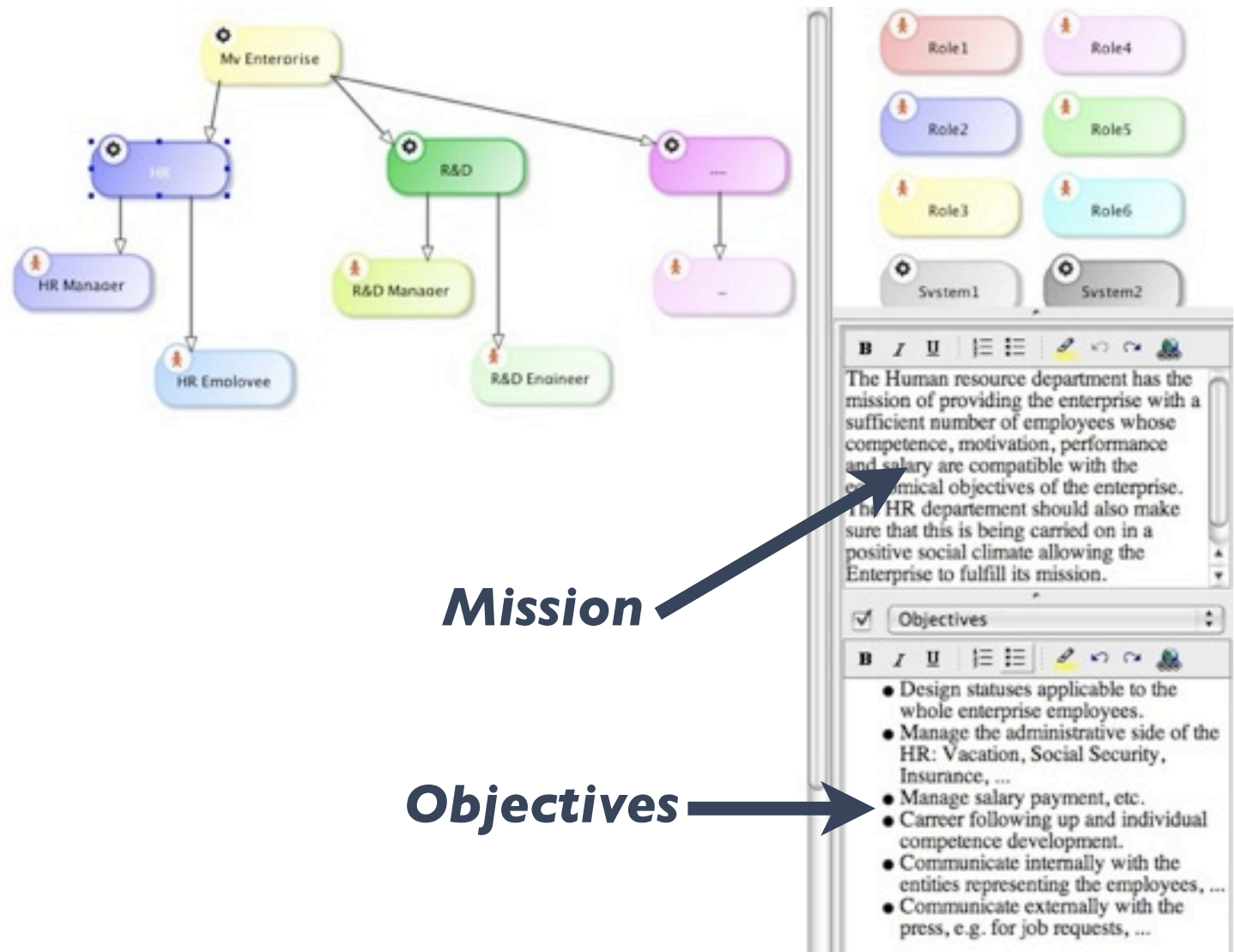
- Successful Change Management
- Change Management with Openflexo
- Openflexo Platform
- **Openflexo Deliverables**
- Openflexo Mission Packages







From Openflexo modelling .....







## From Openflexo modelling to MS Word Docs

Operational structure

### 5 Organizational Units and Roles

Table of roles used in processes associated with Organizational Units.

**Best practice:** always use a substantive for the role name sometimes associated with a complement (e.g. Writer, Project Manager, Order Manager, ...).



#### 5.1 Root: My Enterprise

##### Mission:

[Click here to fill the general description](#)

##### 5.1.1 ORGANISATIONAL UNIT: HR

##### Mission:

The Human resource department has the mission of providing the enterprise with a sufficient number of employees whose competence, motivation, performance and salary are compatible with the economical objectives of the enterprise. The HR department should also make sure that this is being carried on in a positive social climate allowing the Enterprise to fulfill its mission.

##### Objectives:

- Design statuses applicable to the whole enterprise employees.
- Manage the administrative side of the HR: Vacation, Social Security, Insurance, ...
- Manage salary payment, etc.
- Career following up and individual competence development.
- Communicate internally with the entities representing the employees, ...
- Communicate externally with the press, e.g. for job requests, ...

Y 0.1 Step: Process catalogue



Here is the list of associated roles:

Role	Mission
HR Manager	HR Manager develops and implements the HR policy. He/she also supervises the HR Employee in executing the HR mission.
HR Employee	HR Employee is practically performing HR tasks under the supervision of the HR Manager. <a href="#">Click here to fill the UserManual description</a>

##### 5.1.2 ORGANISATIONAL UNIT: R&D

##### Mission:

R&D Division is responsible for performing research and developing new products

##### Objectives:

- Discovering new knowledge about products, processes, and services,
- Applying that knowledge to create new and improved products, processes, and services that fill market needs.

Here is the list of associated roles:

Role	Mission
R&D Manager	<a href="#">Click here to fill the general description</a>
R&D Engineer	<a href="#">Click here to fill the general description</a>

##### 5.1.3 ORGANISATIONAL UNIT: ....

##### Mission:

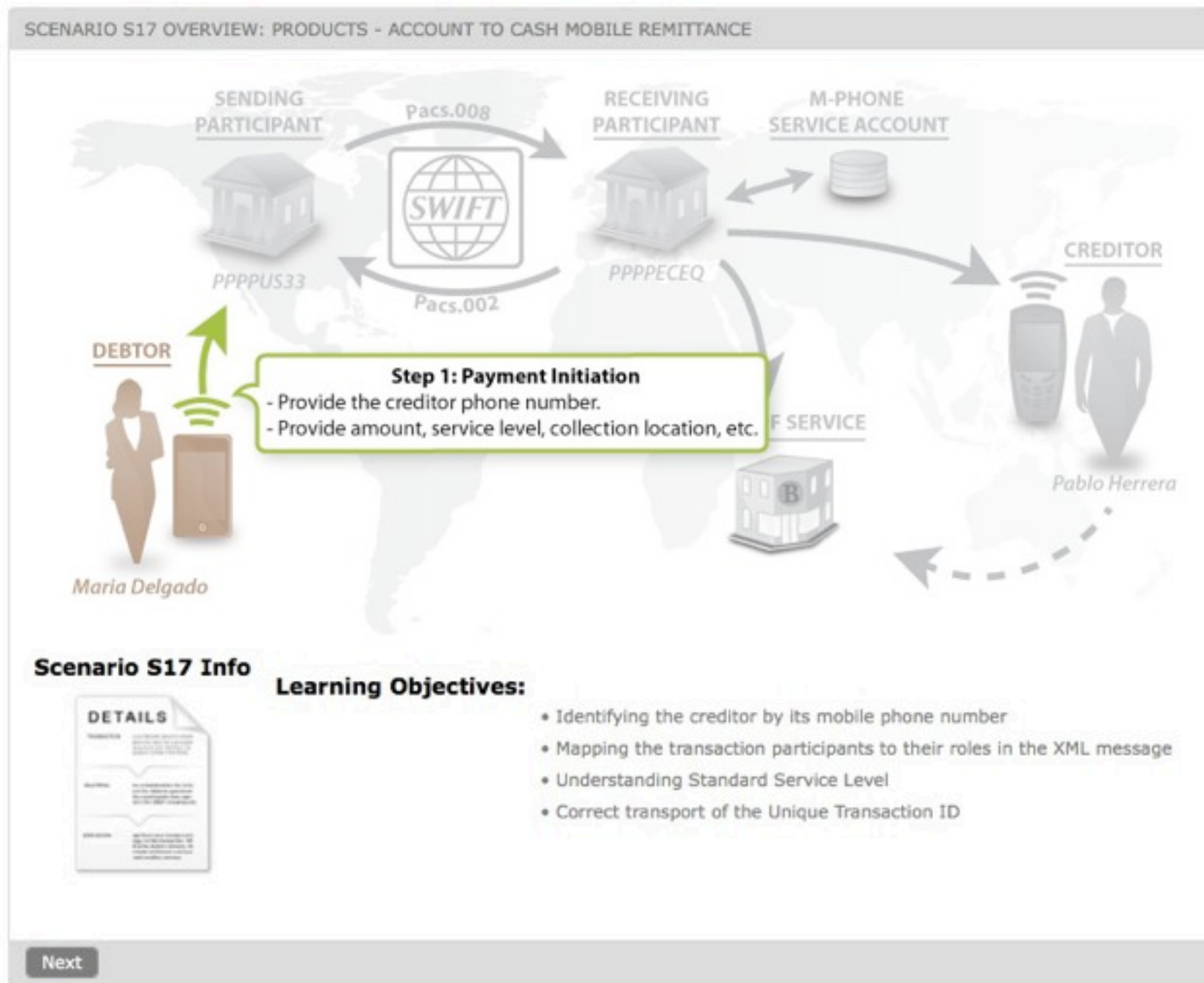
[Click here to fill the general description](#)

Here is the list of associated roles:

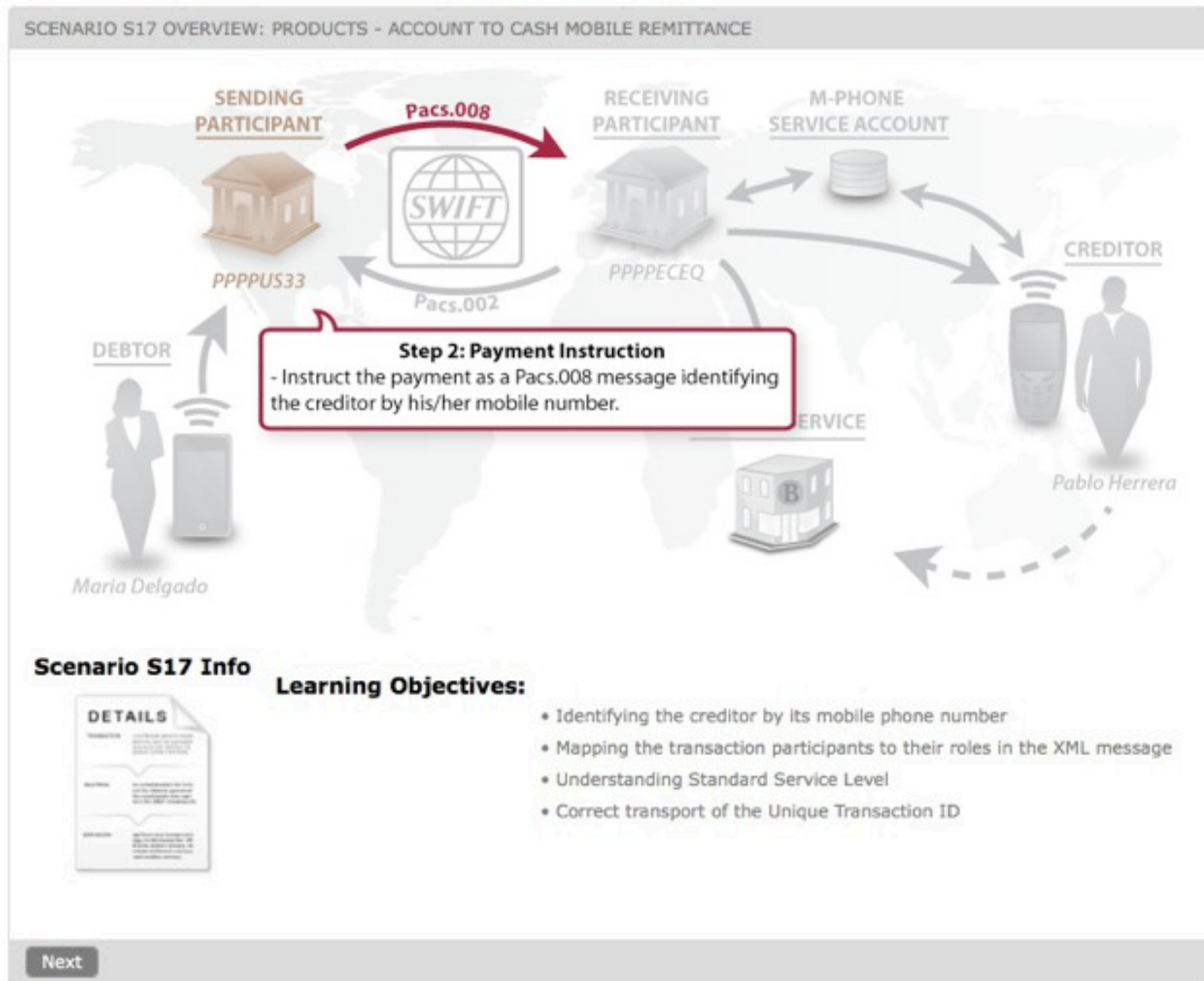
Role	Mission
..	<a href="#">Click here to fill the general description</a>



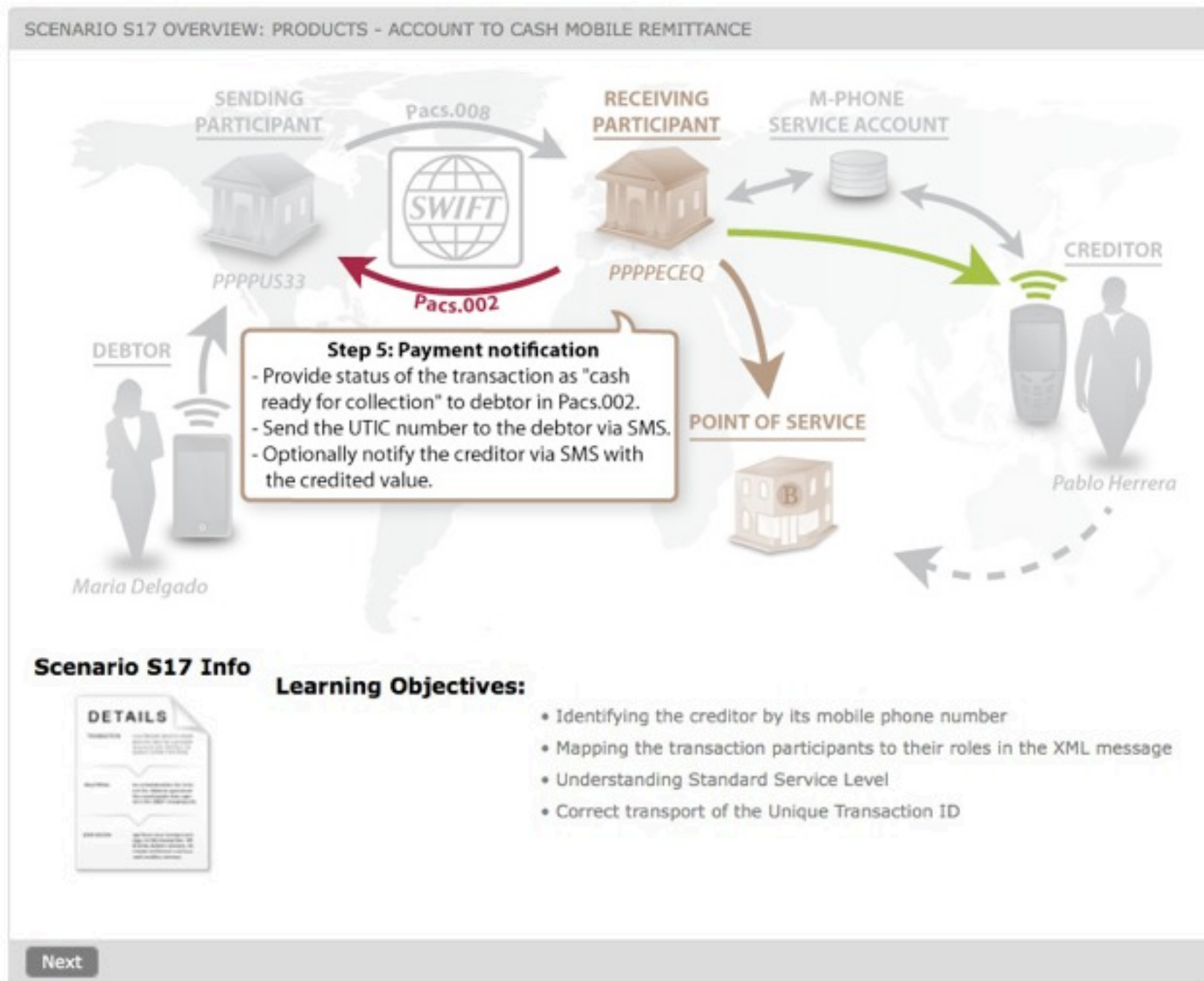
# Openflexo Deliverables: Storyboarding



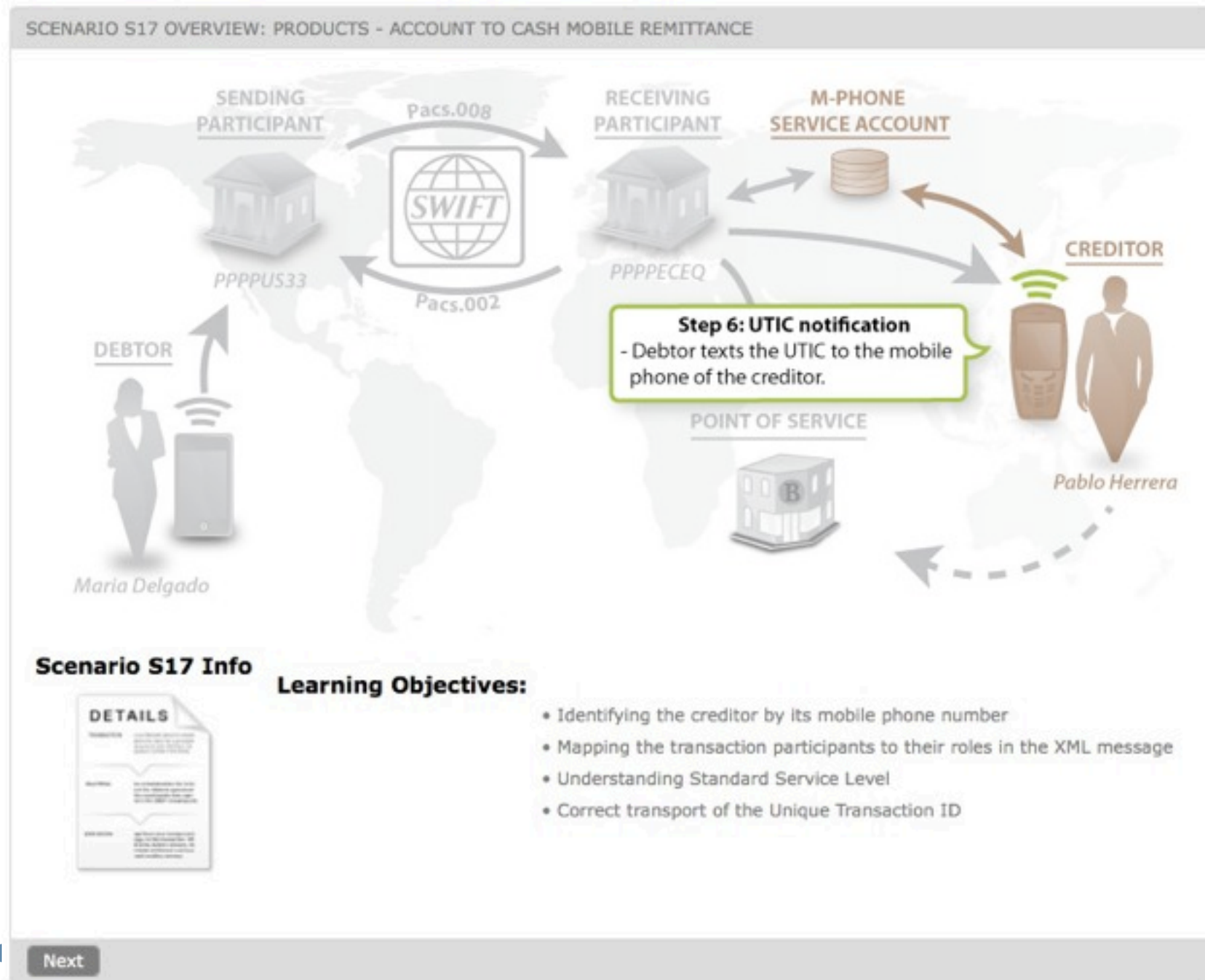
# Openflexo Deliverables: Storyboarding

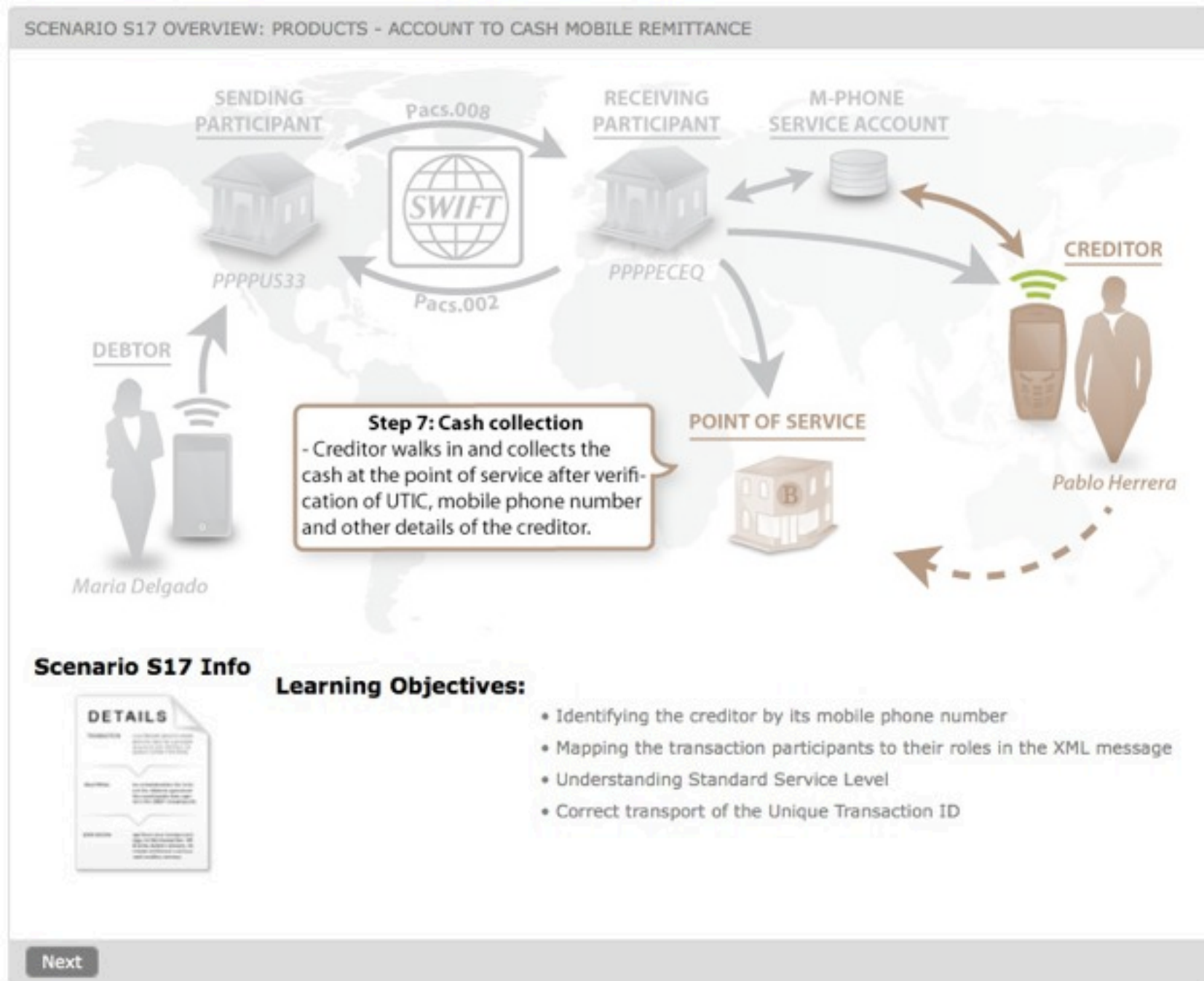




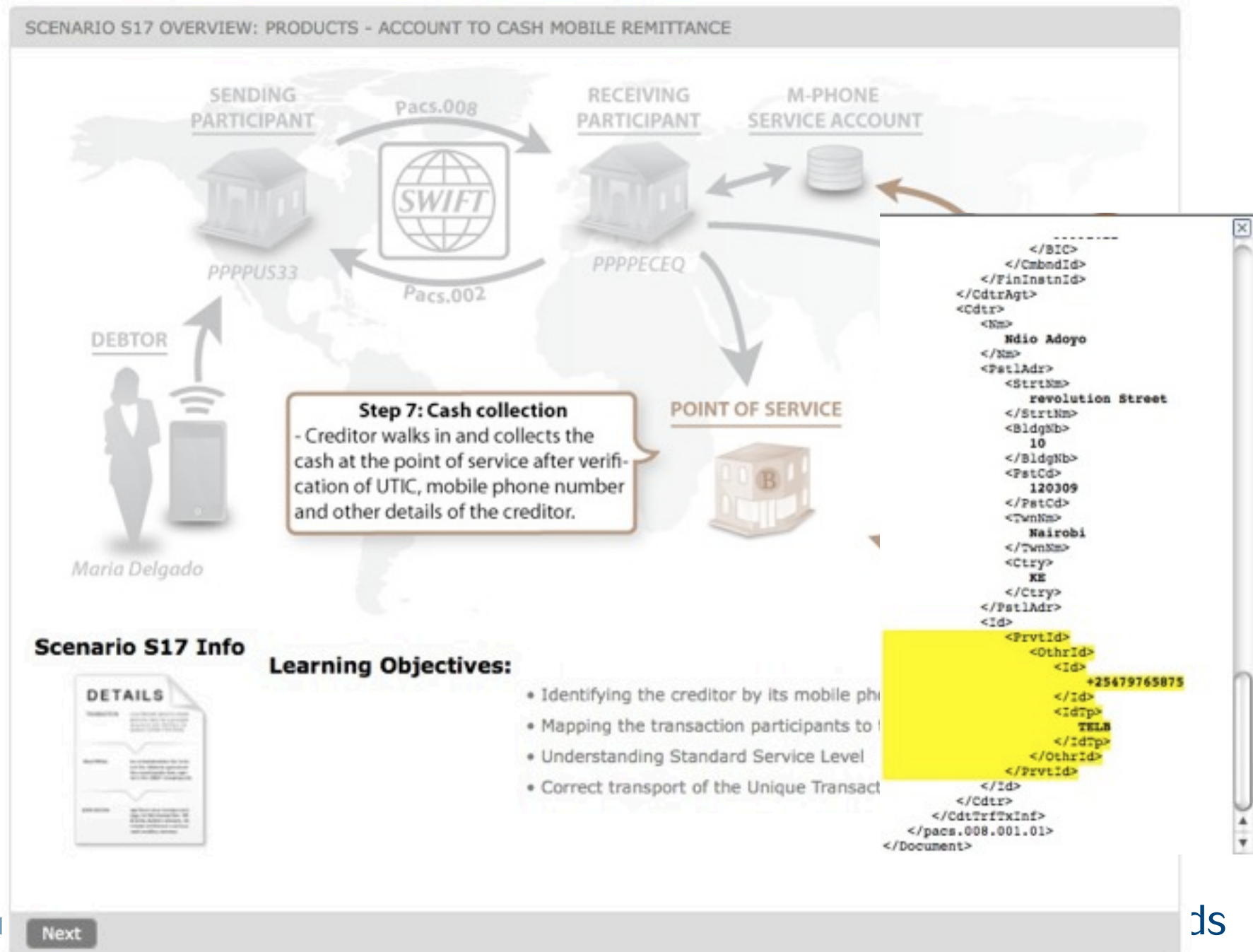


# Openflexo Deliverables: Storyboarding





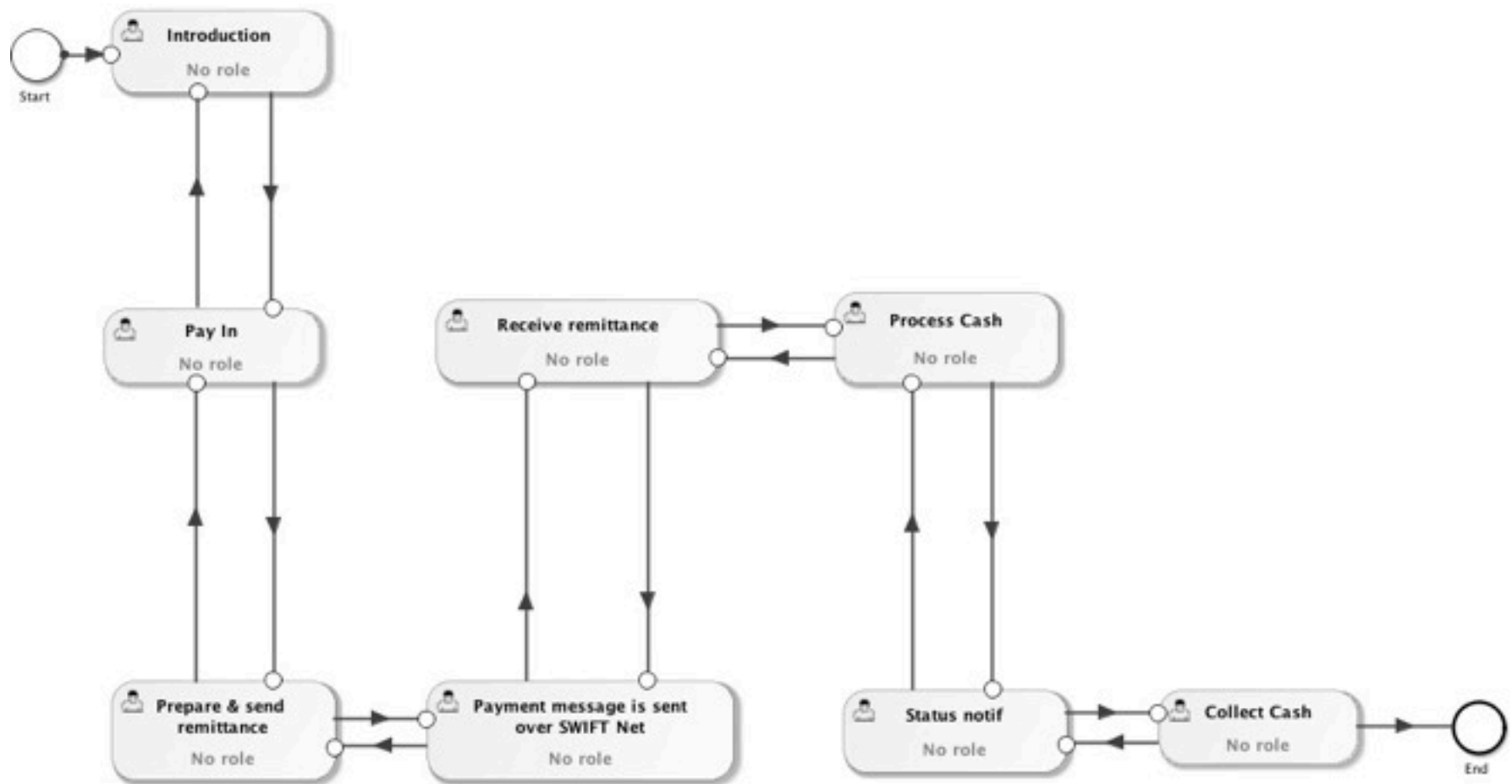
# More than just a PPT presentation



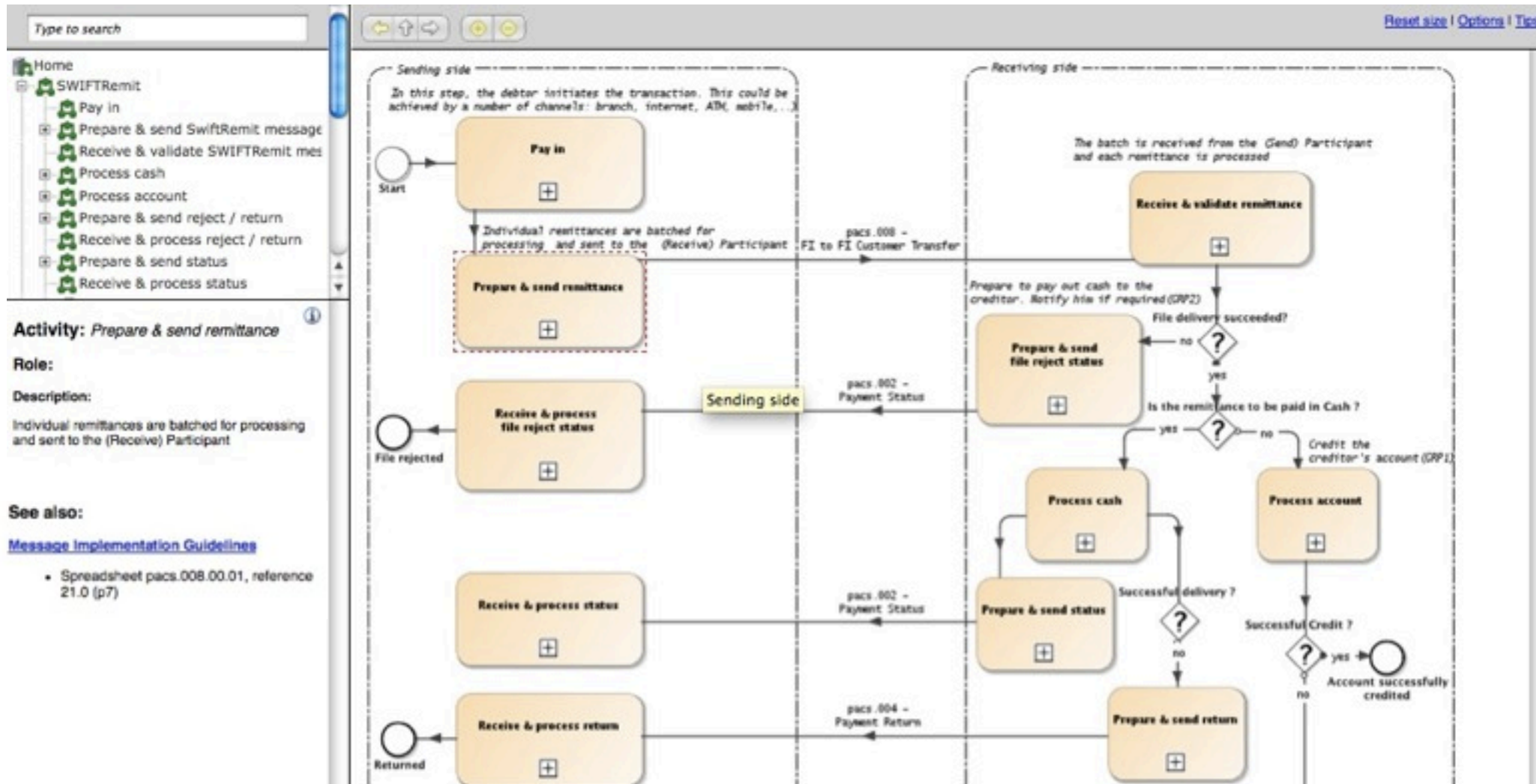




## From Openflexo modelling to communication

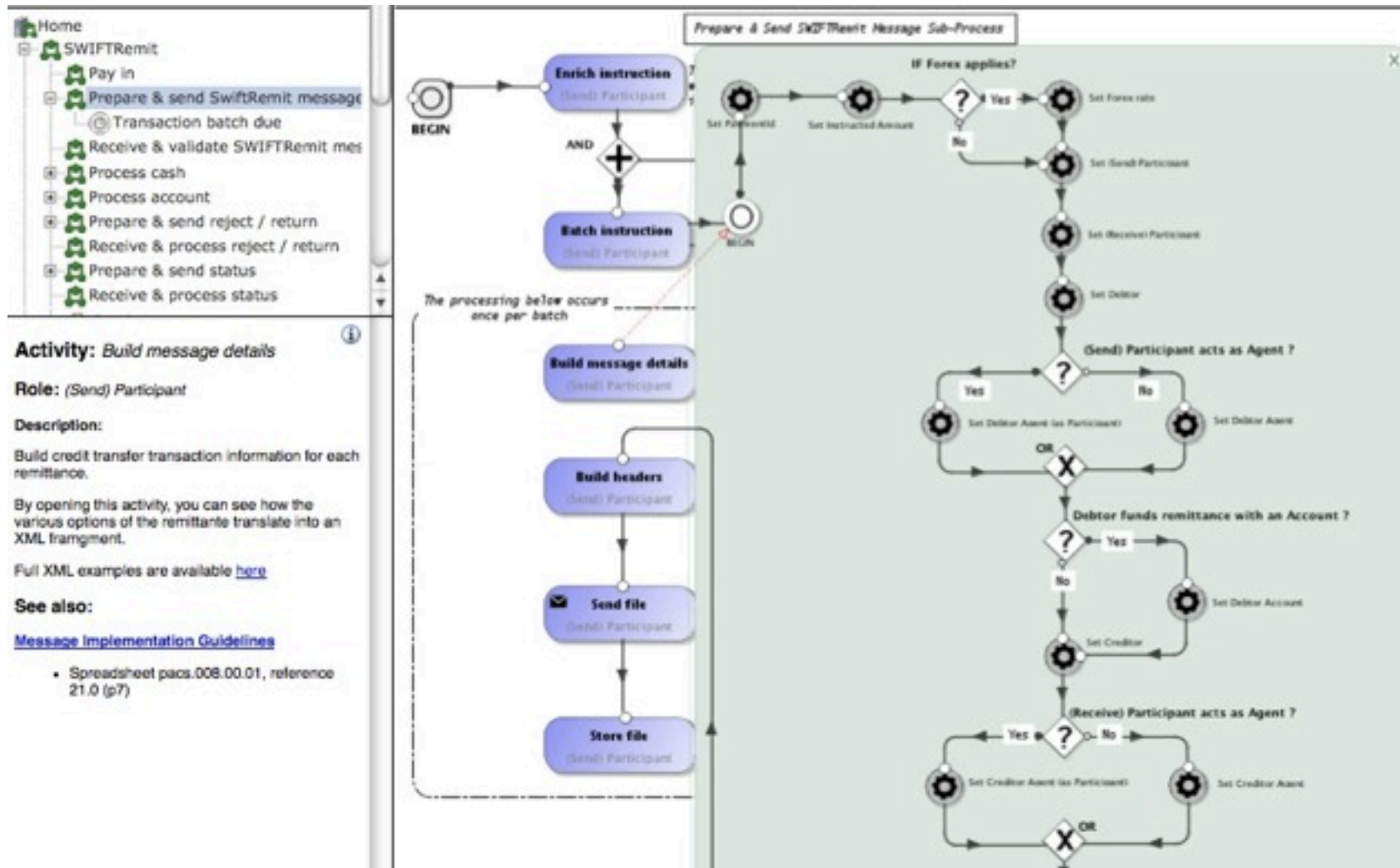


# Interactive Process Reader: SWIFT's example



Browsing through a catalogue of business scenarios

# Interactive Process Reader: SWIFT's example



Drilling down to map payment business logic  
into SWIFT messaging standard

# Interactive Process Reader: SWIFT's example



The screenshot displays the 'Interactive Process Reader' interface for a SWIFT message. On the left, a sidebar lists various operations, with 'Set Forex rate' selected. The main area shows a process flow diagram for 'Prepare & Send SWIFTRemit Message Sub-Process'. The flow starts with 'BEGIN', followed by 'Enrich instruction' (which includes 'Set Participant'), then 'Set Participant', 'Set Instructed Amount', and a decision point 'IF Forex applies?'. If 'Yes', it leads to 'Set Forex rate'. Below the flow, a detailed view of the message structure is shown, including fields like 'GroupHeader', 'CreditTransferTransactionInformation', 'PaymentIdentification', 'InterbankSettlementAmount', 'InterbankSettlementDate', 'SettlementTimeIndication', 'SettlementTimeRequest', 'AcceptanceDateTime', 'PoolingAdjustmentDate', 'InstructedAmount', 'ExchangeRate', 'ChargeBearer', 'PreviousInstructingAgent', and 'PreviousInstructingAgentAccount'. The 'ExchangeRate' field is highlighted, and its XML sample is displayed on the right.

**Operation: Set Forex rate**

Message Binding  
Set the Forex rate into the message.  
[See details](#)

**Set the Forex rate into the message.**

pcs.008.001.01: FIToFICustomerCreditTransferV01

- GroupHeader: GroupHeader2
- CreditTransferTransactionInformation: CreditTransferTransactionInformation2
  - PaymentIdentification: PaymentIdentification2
  - InterbankSettlementAmount: CurrencyAndAmount
  - InterbankSettlementDate: ISODate
  - SettlementTimeIndication: SettlementDateTimeIndication1
  - SettlementTimeRequest: SettlementTimeRequest1
  - AcceptanceDateTime: ISODateTime
  - PoolingAdjustmentDate: ISODate
  - InstructedAmount: CurrencyAndAmount
  - ExchangeRate: BaseOneRate
  - ChargeBearer: ChargeBearerType1Code
  - PreviousInstructingAgent: BranchAndFinancialInstitutionIdentification3
  - PreviousInstructingAgentAccount: CashAccount7

The ExchangeRate message component has been built in the following step:

- [Store Forex](#) (Variable ExchangeRate)

Xml sample :

```
<pcs.008.001.01>
  <GrpHdr>
    ...
  </GrpHdr>
  <CdtTrfTxInf>
    ...
    <InstAmt Ccy="USD">250.00</InstAmt>
    <XchgRate>0.9190</XchgRate>
    <ChrgBr>DEBT</ChrgBr>
    ...
  </CdtTrfTxInf>
</pcs.008.001.01>
```

Access to contextual technical details of SWIFT XML messages



## From modelling to **rapid prototyping**

Agenda de : Eric MACQUAIRE

UO : ENTITE HYERES

Poste type : DIRECTEUR ENTITE

Expertises : ASSU, JEUN, CRED

[Paramètre Aide](#)

La réunion "POINT DAPIN" a été supprimée.

**Octobre 2010**

Di	Lu	Ma	Me	Je	Ve	Sa
						1 2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Aujourd'hui

[Mon agenda](#)  
[Vues Agence](#)  
[Mes favoris](#)  
  
[Rechercher Agenda](#)  
  
[Afficher salles disponibles](#)

**Semaine 23**

	0098	0089	0089	0089	0089	0089
	Lundi 24 Août	Mardi 25 Août.	Mercredi 26 Août.	Jeudi 27 Août.	Vendredi 28 Août.	Samedi 29 Août.
08:00	DUPONT ERIC	PONT SEMAI		MARTIN MICH		
08:00			PROSPECT			
08:00						
08:00	FINALIS. AP					
08:00						





## From modelling to **rapid prototypes**

Verkoop | Klant

Commerciële benadering | Agenda | Mijn To Do's

[Mijn agenda](#)  
[Mijn Favorieten](#)  
[Opzoeken agenda](#)  
[Zaalbeschikbaarheid](#)

Versie : 10.2.0

### Evenement aanmaken

Eventype : Activiteit

Activiteit

Datum : 27/4/11  
Uur : 9 : 45  
Plaats : Gent-Centrum  
Duur : 1 : 0  
Onderwerp : Activiteit  
Vertrouwelijke  
Commentaar :  
Occupatie herhaling

Occupatie herhaling

# Openflexo Deliverables: Rapid Prototyping



ClientCommercialApproach - Microsoft Internet Explorer

Address: https://rem33.banfactory.net/5002POC\_9.11/WebObjects/5002POC\_9.11-ws4/va/17.0.9.7

BNP PARIBAS FORTIS | Dossier Kient

John McGregor (WIK, 222823) | Franky Cleys (MIL, 2) | +32 495 57 58 96 | Verspreiding (TIT11) | Adreswijziging (18/5/11)

Commerciële benadering | Details klant | Persoonlijk | Verkoop | Afrekenen | Beoordelen

Acties voor John McGregor | Acties voor het team | Historiek

Legende acties (3)

Type	Doel	Via	Geldig tot	Status
OKL	<a href="#">Baan- en leningsplanningen</a>	Contact Center	10/9/11	Uit te voeren
LOC	<a href="#">Levensverzekeringen - Particulieren</a>	Contact Center	11/9/11	Uit te voeren
LIC	<a href="#">BANKING</a>	Contact	18/9/11	Uit te voeren

Geplande afspraken (2)

Batum/oor	Doel	Adviseur	Gemaakt door
03/09/11 11:00	Financiële optimalisatie	Franky Cleys	Franky Cleys
03/09/11 11:00	Fondsen/Obligaties/Randalen	Franky Cleys	Franky Cleys

Reactive acties (2)

Doel	Status
<a href="#">Consumentencrediet</a>	Uit te voeren
<a href="#">Levensverzekeringen - Particulieren</a>	Uit te voeren

Projecten (2)

Doel	Gemaakt door	In Hijn Te Do op	
<a href="#">Fondsen/Obligaties/Randalen</a>		4/12/11	
<a href="#">Consumentencrediet</a>	Franky Cleys	18/9/11	

Klantinformatie (1)

Doel	
<a href="#">Fondsen/Obligaties/Randalen</a>	

Service aanvragen

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## From Rapid Prototyping to E-Learning

The screenshot shows a web application titled "ECA - Salesforce Workstation" with a navigation bar containing "Accueil", "Mes TO DOs", "Mon agenda", and "Rechercher Client". The main content area is divided into several sections: "Actualité commerciale" with a list of news items, "Actions commerciales en cours" with a list of ongoing campaigns, "Actualité commerciale" (repeated) with another list of news items, "Avis importants" with a list of important notices, "Agenda - Lundi 15/01/2010" with a list of events, "Gestion des salles" with a link to "Gérer les salles", and "Mes TO DOs (33)" with a list of tasks. A woman character in a white top and red skirt stands in the center, pointing towards the interface. A large yellow speech bubble contains the text: "Bonjour, je suis votre formatrice pour ce module. M. Fabritius, Relationship Manager, démarre sa nouvelle Workstation. La page d'accueil s'ouvre. Il consulte rapidement sur son business desktop les dernières nouvelles sur l'actualité commerciale". A smaller orange speech bubble at the bottom right contains the text: "Veuillez suivre les instructions dans le texte d'explication. Cliquez sur l'hyperlien Les Journées de". The interface also features a "MY BANK" logo, a "DEPARTIEU 1" button, and a "Session Client" button.

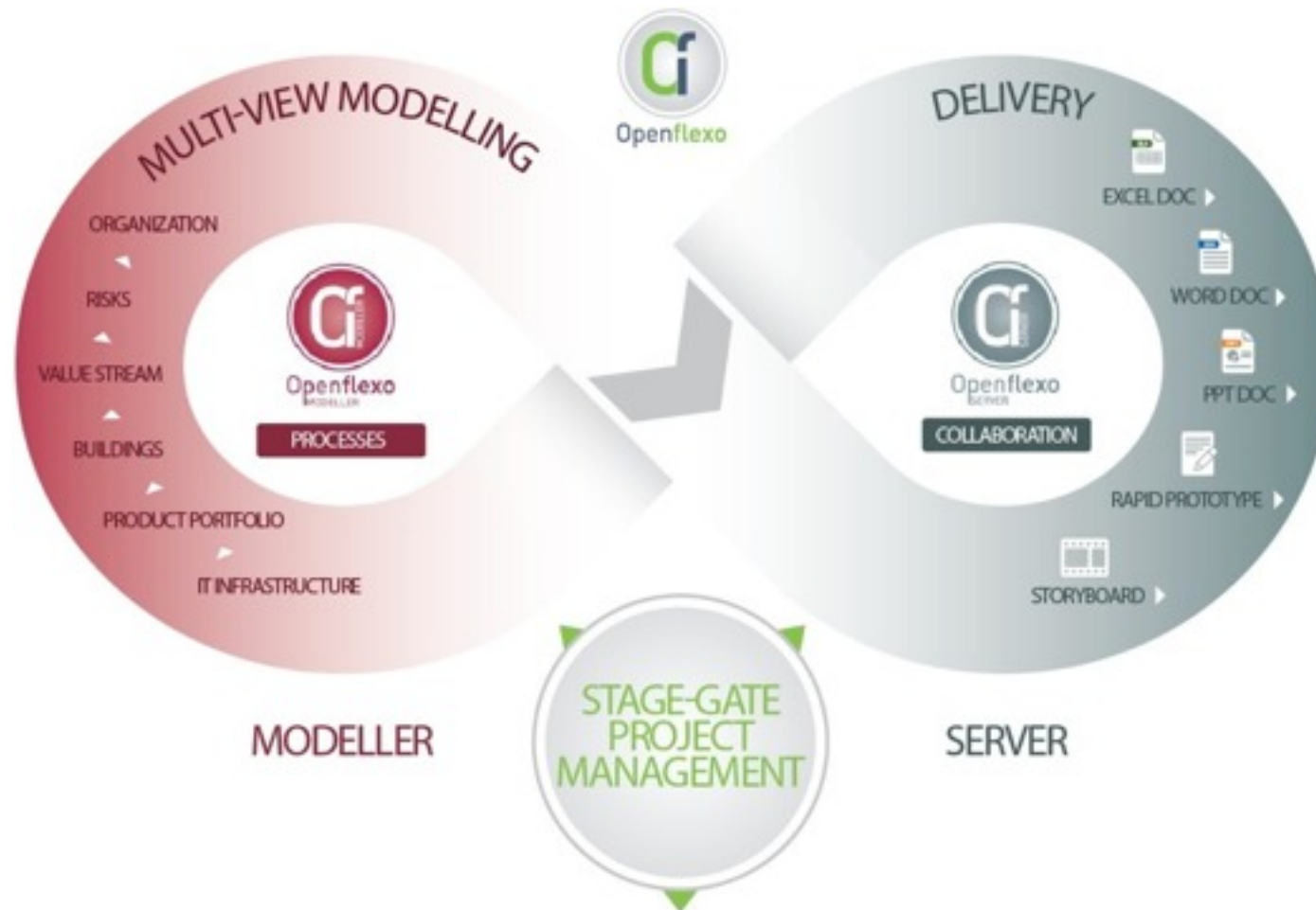




- Successful Change Management
- Change Management with Openflexo
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- Openflexo Deliverables
- **Openflexo Mission Packages**



## Model Driven Business Service Delivery





STAGE 1: SCOPE DEFINITION

STAGE 2: DIAGNOSE

STAGE 3: ACT

STAGE 4: IMPROVE

## ACTIVITIES:

- Understand organization
- Understand operation
- Scope and key resources
- Communicate

- Collect data
- Consolidate data
- Plan actions

- Distribute Actions
- Act
- Control quality

- Gather periodic data
- Validate
- Communicate
- Improve

## OPENFLEXO CONFIGURATION:

- Organization viewpoint
- Operation viewpoint
- Report templates
- Storyboard templates

- Form templates
- Excel templates
- Report templates

- Todo templates
- Report templates

- Form templates
- Report templates
- Storyboard templates

## OPENFLEXO DELIVRABLES:

- Scope report
- Storyboard

- Encoding forms
- Excel sheet
- Action plan

- Implementation report

- Excel sheet
- Storyboard
- Continuous improvement
- Action plan



## From Open Framework

## to Openflexo Mission Package

### **Bilan Carbone™** **Companies and Local Authorities Version**

Methodological Guide

(Version 5.0) :

Objectives and Principals for the Counting of  
Greenhouse Gas Emissions

JANUARY 2007



**BILAN CARBONE**



French Agency for the Environment  
and Energy Management



Interministerial Mission  
on the Greenhouse Effect

#### Mission Road Map

	Define Scope Assign resources	Collect Activity data and drivers	Consolidate data	Define change action	Act	Reflect
<b>Activities</b>	<ul style="list-style-type: none"> <li>Understand business model &amp; value chain</li> <li>Define operational &amp; organizational boundaries</li> <li>Validate activity data availability</li> <li>Assign key resources</li> <li>[OPTIONAL] Provide team training</li> </ul>	<ul style="list-style-type: none"> <li>Setup data collection process</li> <li>Develop customized tools and collection sheets</li> <li>Collect activity data (Option: Site visits)</li> <li>Ensure data quality</li> <li>Collect major activity drivers information</li> <li>Validate key assumptions with data owners</li> </ul>	<ul style="list-style-type: none"> <li>Consolidate activity data</li> <li>Identify gaps &amp; double counts</li> <li>Collect Emission Factors information</li> <li>Calculate GHG emissions</li> <li>Calculate carbon intensity ratios</li> <li>Evaluate accuracy level</li> </ul>	<ul style="list-style-type: none"> <li>Identify scenarios for GHG drivers</li> <li>Validate assumptions</li> <li>Build Business-as-Usual scenarios</li> <li>Setup realistic GHG emissions targets with smart KPIs</li> <li>Benchmark industry to highlight best practices</li> </ul>	<ul style="list-style-type: none"> <li>Highlight emissions reduction opportunities</li> <li>Quantify major reductions actions</li> <li>Cost-abatement curves</li> <li>Rank actions and setup plan to reach objectives</li> <li>Action plan implementation</li> <li>Carbon Offsetting strategy</li> </ul>	<ul style="list-style-type: none"> <li>Validate results &amp; get team buy-in</li> <li>Identify best internal and external communication strategy</li> <li>Develop &amp; share project report</li> <li>Develop public reporting (Corporate CSR, GRI &amp; CDP)</li> </ul>
<b>OpenFlexo Deliverables</b>	<ul style="list-style-type: none"> <li>Scope defined</li> <li>Team in place</li> <li>Data availability list</li> </ul>	<ul style="list-style-type: none"> <li>Activity data database completed</li> <li>Activity drivers &amp; assumptions validated</li> </ul>	<ul style="list-style-type: none"> <li>Carbon footprint results &amp; accuracy</li> </ul>	<ul style="list-style-type: none"> <li>Forward looking footprint estimated</li> <li>Realistic targets in place</li> </ul>	<ul style="list-style-type: none"> <li>Emission reduction action plan in place</li> </ul>	<ul style="list-style-type: none"> <li>Internal &amp; external communication (reports)</li> </ul>
<b>OpenFlexo Configuration</b>	<ul style="list-style-type: none"> <li>Scope template</li> <li>Storyboard template</li> <li>Organisation &amp; value stream viewpoints</li> </ul>	<ul style="list-style-type: none"> <li>Encoding form template</li> <li>Monitoring template</li> </ul>	<ul style="list-style-type: none"> <li>Carbon footprint template</li> <li>Excell sheet template</li> </ul>	<ul style="list-style-type: none"> <li>Action plan template</li> </ul>	<ul style="list-style-type: none"> <li>Todo list template</li> <li>Monitoring template</li> </ul>	

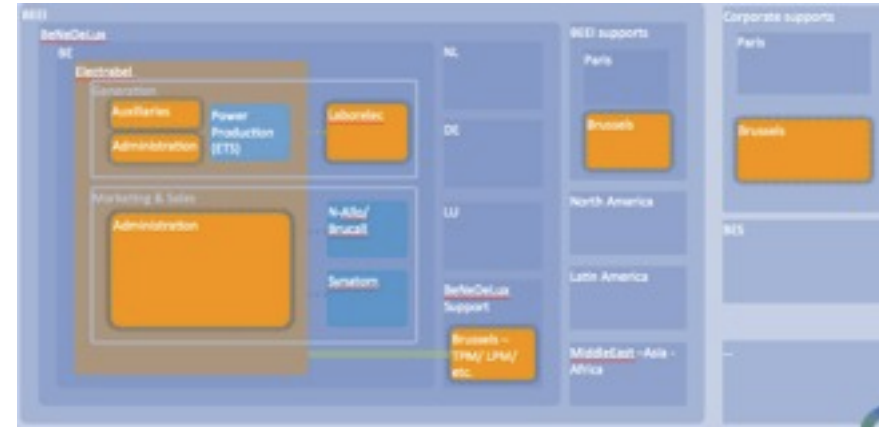
Standardization

Expertise

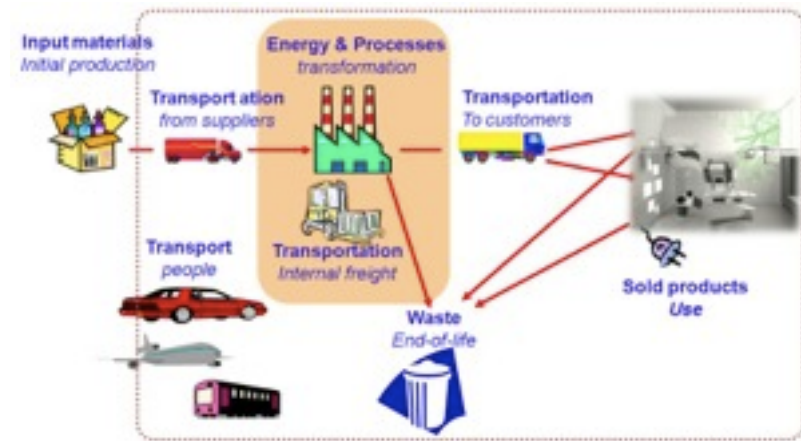
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## Organisation View



## Operational View

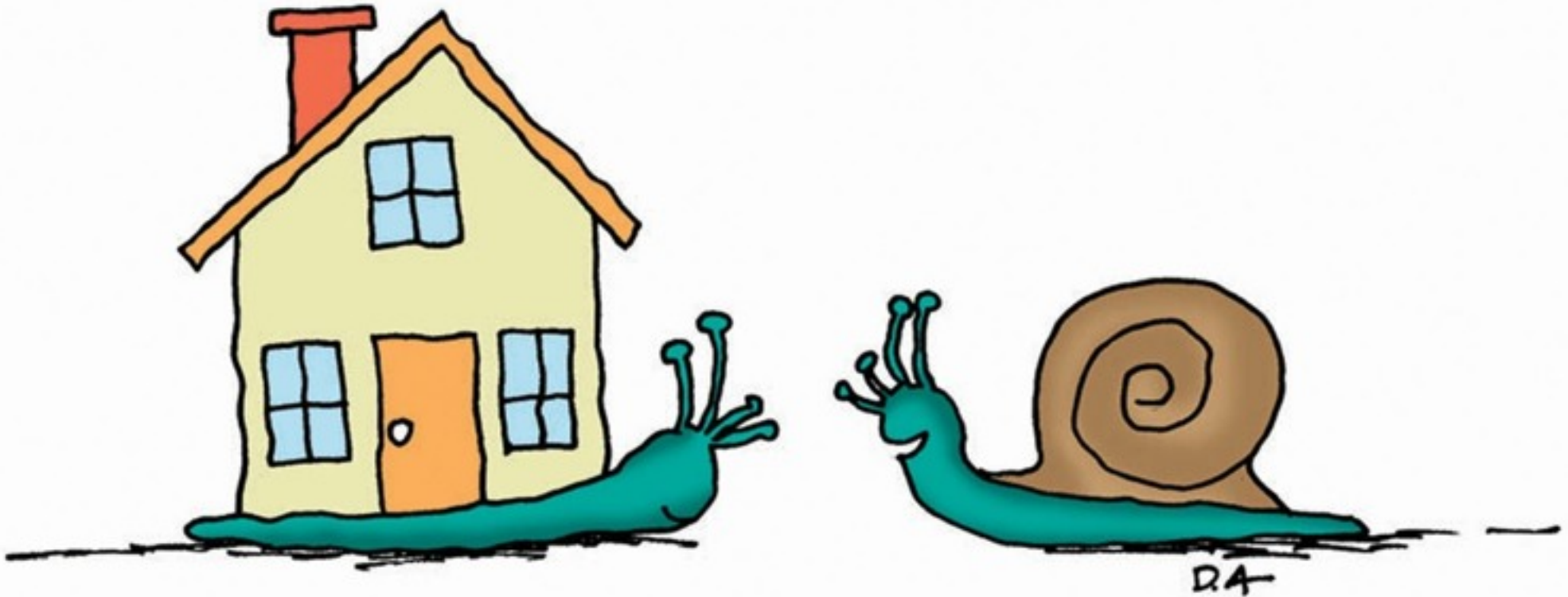


Value stream mapping: (SIPOC, ...)



- Defining owners at the organizational/operational cross road.
- Sending forms for data capture.
- Task management.
- Data consolidation.
- Online data warehouse.
- Periodic report.
- ...





“Love your renovations.”



Openflexo

# Thank you !



Do not hesitate to contact us:

[dominique.snyers@agilebirds.com](mailto:dominique.snyers@agilebirds.com)

[www.openflexo.com](http://www.openflexo.com)

[www.agilebirds.com](http://www.agilebirds.com)

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