Deliverable

redefining / standards

Pragmatic Model for Lead Management

Multi-Access

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1 Introduction

Definition: The pragmatic aspect is about organization, activities and practices.
It is described mainly in terms of processes and use cases.
A use case is an elementary working situation, while a process shows the cooperation among many actors.

Modeling decision:
Among the motivations of this modeling exercise, the convergence concern put the stress on the way of defining the organization. Wherever it is possible, the roles described in the model are maintained in the limit of a logical construct. That is to say that they don't imply any specific organization. A specific organization (for a company) may be obtained by assembling these logical roles.
The modeler seeks the more generic description that is possible, so as to preserve the liberty of adaptation.

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3 Package "Pragmatic aspect"

from Package AXA Transversal Repository

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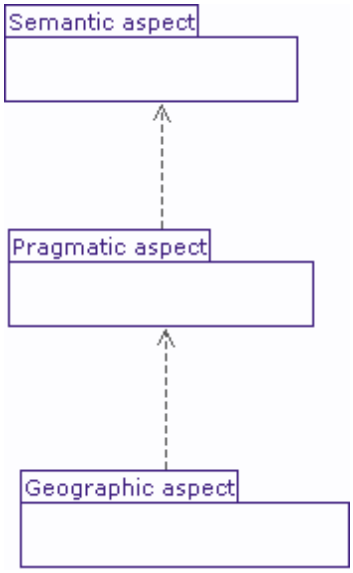

Figure 1 Positioning the Pragmatic aspect

According to the Enterprise System Topology, the business description is established through three aspects:
- semantic aspect: the core business knowledge (made up of business objects, notions and concepts);
- pragmatic aspect: the organization and business activity (represented by means of processes and use cases);
- geographic aspect: the deployment of the organization in terms of sites.

The description of the business activity refers to the business objects found in the semantic aspect. That explains the dependency of this package to the package representing the semantic aspect.

Once an organization has been defined with its roles and processes, the next question is how it will be deployed physically. The answer is provided inside the geographic aspect.

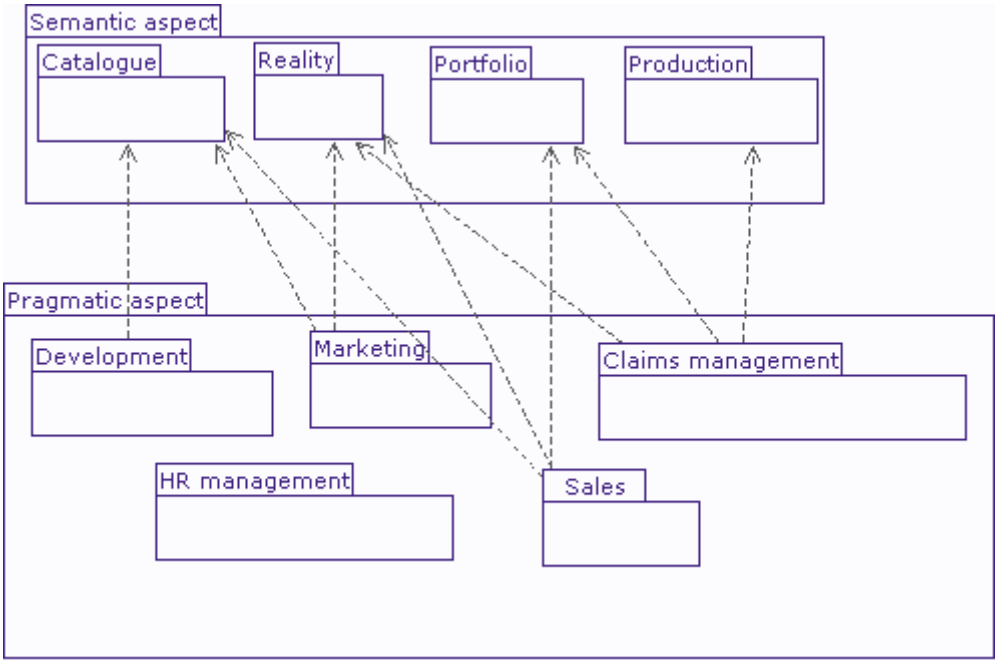

Figure 2 Structure of the Pragmatic aspect

There is no dependency among the functional domains (with the exception of the "General Activities" package which factorizes facilities).
The rationales are:
a) We want to reduce the coupling.
b) The interactions between organizational entities are actualized via business objects. These have been expelled from the business activity description and concentrated inside the object domains of the semantic aspect.
c) When an activity involves many actors or activities from various functional domains, it is represented as a process. Such a process is deemed inter-functional and attached to the package that represents the pragmatic aspect. There exists a handful of inter-functional processes. Each one is motivated by one of the deep and major objective of the enterprise.

Activity "Lead management"

Lead management is the activity that aims to gain the most value from contacts and sales opportunities.

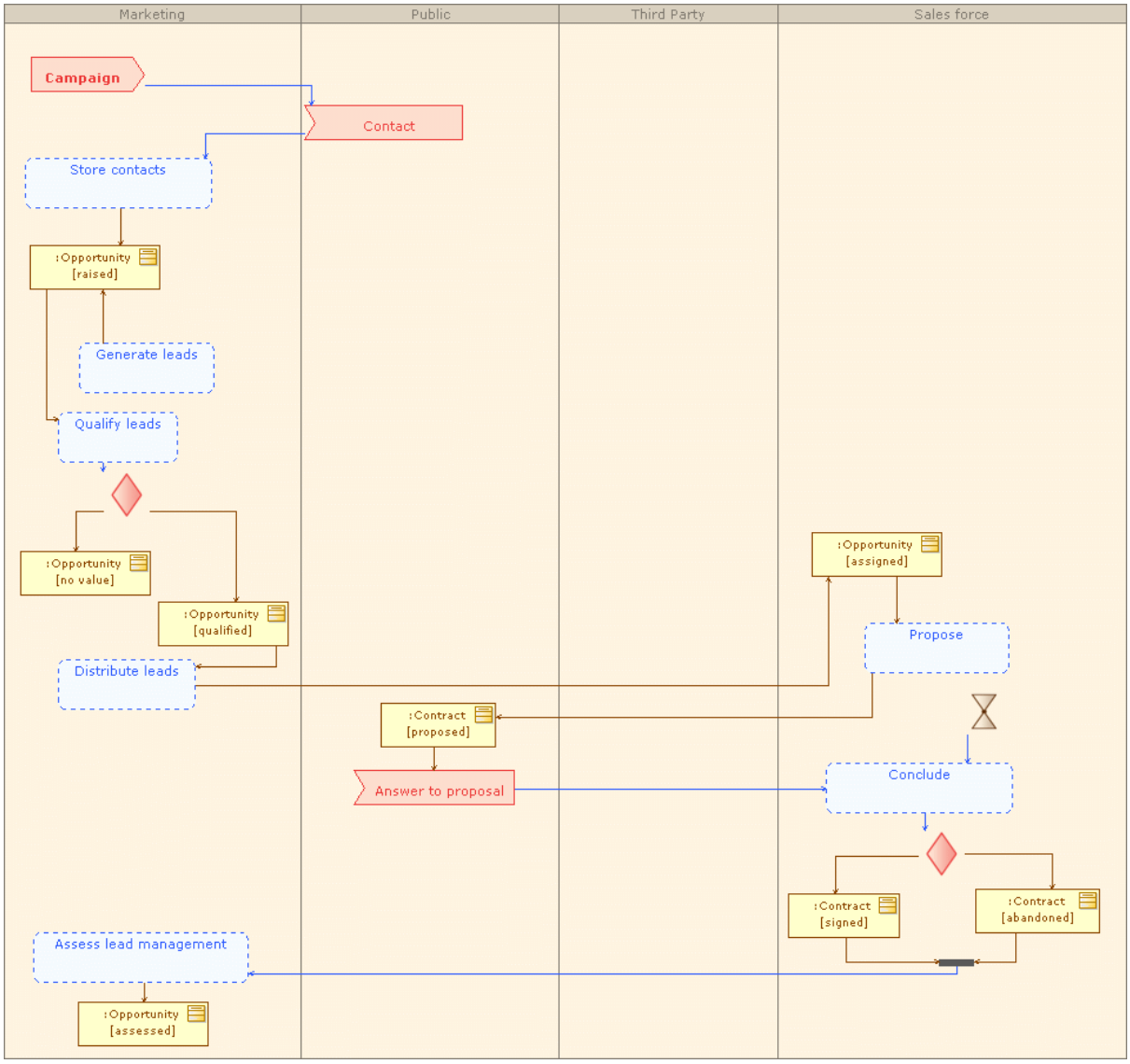

Figure 3 SIPOC

This diagram is based upon the SIPOC (a representation showing Suppliers, Inputs, Process steps, Outputs, Customers.
According to the notation and the method, this diagram only retains:
- the actors involved in the process;
- the events and objects, which the actors exchange and which circulate among the activities;
- the activities that produce or transform information and objects.

In the pragmatic model, the representation focuses on actors and activities, regardless of the physical and technical conditions in which they operate. That explains why this activity diagram differs from the SIPOC. The question of the medium (Internet, phone, mail...) is introduced in other aspects.

Owned Packages	Summary
Development	
Marketing	

Owned Packages	Summary
Sales	
Claims management	
HR management	
General activities	
Public interactions	

Table 1 Owned Packages of Package "Pragmatic aspect"

4 Package "Development"

from Package AXA_Transversal_Repository.Pragmatic aspect

<< out of scope >>

5 Package "Marketing"

from Package AXA_Transversal_Repository.Pragmatic aspect

Functional domain encompassing the marketing activity.

Owned Classes	Summary
Campaign	Modeling decision: The sales people need to know of the campaigns. As a result, we need either to add a dependency from "Sales" domain to "Marketing" domain or position the class elsewhere.

Table 2 Owned Classes of Package "Marketing"

Owned Use-Cases	Description
Launch a campaign	
Specify a lead generation	
Generate leads	
Assess the results of an operation	
Analyze the opportunities generated	
Dispatch opportunities	
Allocate an opportunity	

Table 3 Owned Use Cases of the package "Marketing"

5.1 Class "Campaign"

from Package AXA_Transversal_Repository.Pragmatic aspect.Marketing

Inherits from: EventInherits from: Event

Modeling decision:
The sales people need to know of the campaigns. As a result, we need either to add a dependency from "Sales" domain to "Marketing" domain or position the class elsewhere.

5.2 Use case "Launch a campaign"

<< Out of scope >>

5.3 Use case "Specify a lead generation"

This use case describes the interaction of a marketing person with the system before launching the generation itself. The lead generation is a batch program that can be scheduled under constraints

independent of the actor will.
Through the "Specify a lead generation" use case, the marketing person defines a target and fixes the conditions that will be applied in the automated process later on.

When the generation has been specified, the actor may launch or schedule the automated generation. This action occurs inside the same use case.

State Machine "State machine for the use case"

State Name	State Description
FinalState	
offer identified	The operation is defined for a specific offer or set of offers: - a product may be designated; - it may be linked to certain conditions in the situation of the targeted population (segment, category, event of the party life cycle...); - it may be related to an event (catastrophe, upcoming period, scholarship...)...
scheduled	The actor in charge of the operation has specified the moment for the lead generation and ordered it.
specified	The operation is fully specified. Thus, the generation can be launched.
specifying	The use case is under way for providing a full description of the operation. This set of information will constrain the further generation of leads. Modeling decision: This modeling implies that information is stored regarding every dimension of the operation. The context may be specified via an object. The Campaign class is a good candidate for this purpose. In case this solution is chosen, the states of the use case ought to be formally expressed in terms of the Campaign states.
target defined	A population has been identified as the target for the operation, whatever criteria may apply.
time conditions specified	The time conditions of the operation are specified: - validity period of the offer; - time window for optimal effect; - instructions to the sales force...

Table 4 State machine for the use case

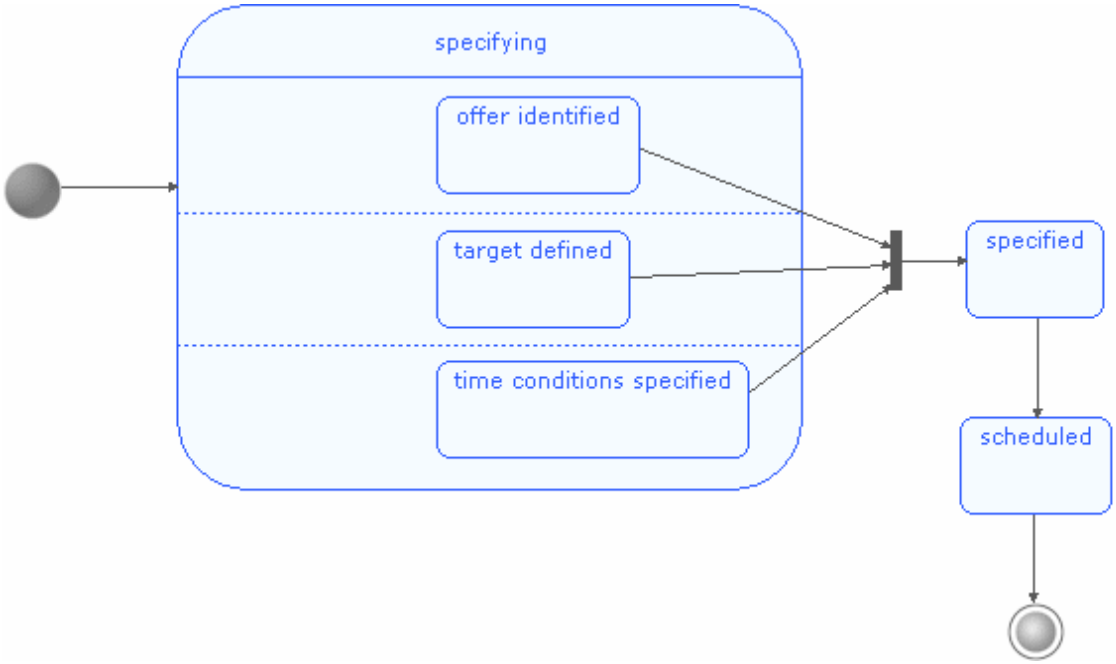

Figure 4 State machine for the use case

<< this diagram is not completed >>

The state machine controls the actions that are provided inside the use case.
Only when all the dimensions of the campaign are specified, the operation is deemed well defined and the generation can start.

It is worth noticing that, because the use case is equipped with a state machine, it may be executed several times for the same operation. The state machine is part of the execution context for the use case.

Modeling decision: <<to be improved>>
NB: Despite the shape of the state machine, the use case can be stopped at any time during the execution. The actor will find the same context again, thanks to the persistent objects that constitute the context of the operation.

5.4 Use case "Generate leads"

Batch program that exploits the specification of the operation and create new leads.
The objects created are instances of the Opportunity class.
The program includes automatic qualification of the opportunities.

Communication Interaction "Communication"

5.5 Use case "Assess the results of an operation"

"Operation" as a term covers more than campaigns. For instance, a datamining analysis which has entailed communication or sales actions may be considered as an operation.
This use case allows for evaluating the process, the context and results of an operation.

Modeling decision:
When specifying this working situation, the modeler will certainly have to come back to other use cases or to the semantic model in order to specify indicators or status that this use case needs for establishing the conclusions of the operation.

5.6 Use case "Analyze the opportunities generated"

This use case enables the marketing people to examine the results of a lead generation.
It encompasses:
- statistic overview (number of leads generated, features...);
- detailed display of selected leads.

Suggestion:
This use case may include the "Specify a lead generation" so that the marketing person instantly corrects the operation specification, depending on the analysis.

5.7 Use case "Dispatch opportunities"

The use case allows for stating the routing rules, and then it launches the asynchronous dispatching of the opportunities among the distributors.
See requirements linked to the use case.

Results include:
- assignment of opportunities to distributors (the assignment is established at the collective level - i.e. Party -; it will then be refined in the agencies through individual allocation - cf. "Allocate an opportunity" use case);
- communication of directives and related material (e.g. campaign documentation).

5.8 Use case "Allocate an opportunity"

This use case allows for allocating or reallocating opportunities to distributors.
Unlike the "Dispatch opportunities" use case, which operates on bunches of opportunities, "Allocate an opportunity" enables the marketing people to individually examine an opportunity and assess the distributor's performance.

6 Package "Sales"

from Package AXA_Transversal_Repository.Pragmatic aspect

"Sales" is a functional domain. It covers the activities of the sales force.

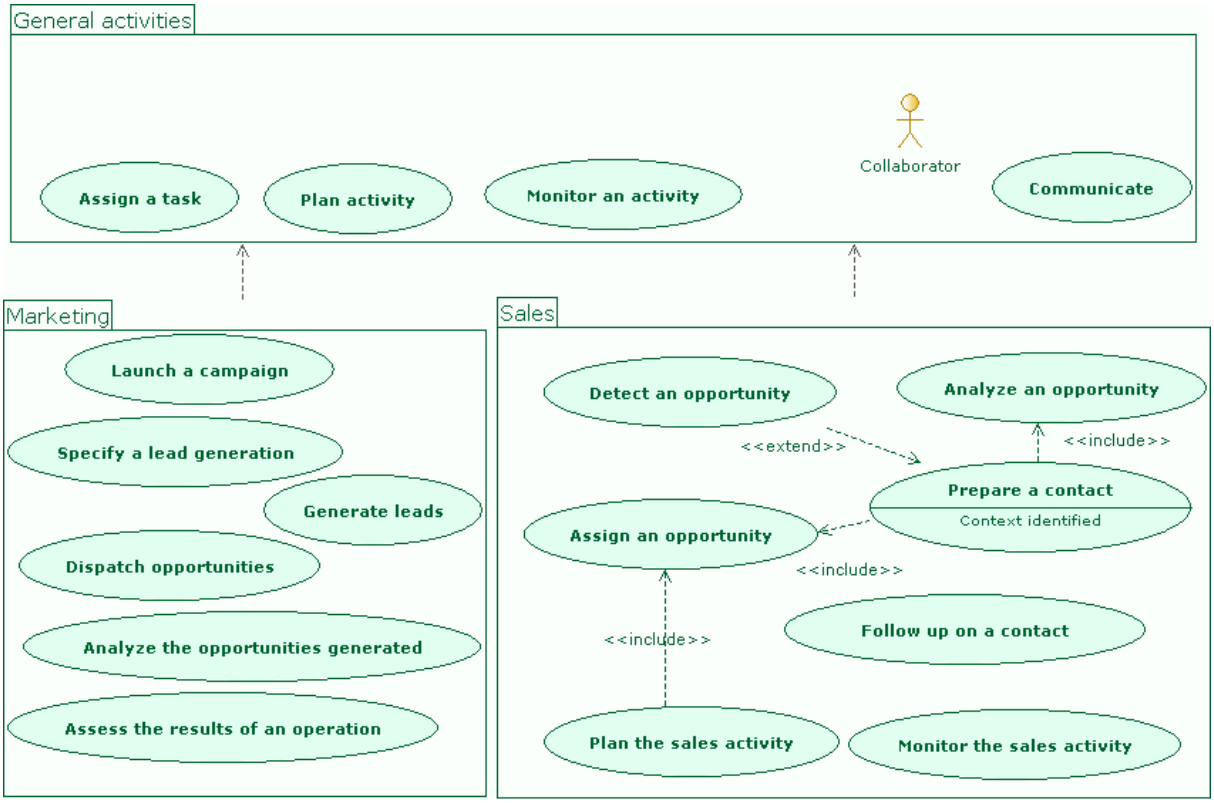

Figure 5 The use cases covering lead management

This use case diagram provides an overview of the activities involved in lead management.
We distinguish between:
- marketing activity that generally considers set of potential actions;
- sales activity that implies a direct or personal contact with a potential customer.

These activities are maintained separated through the business architecture, in the shape of two distinct domains.
The "General activities" domain (see its definition) provides the sales use cases with generic tools.
Other diagrams show the connections with these general activities.

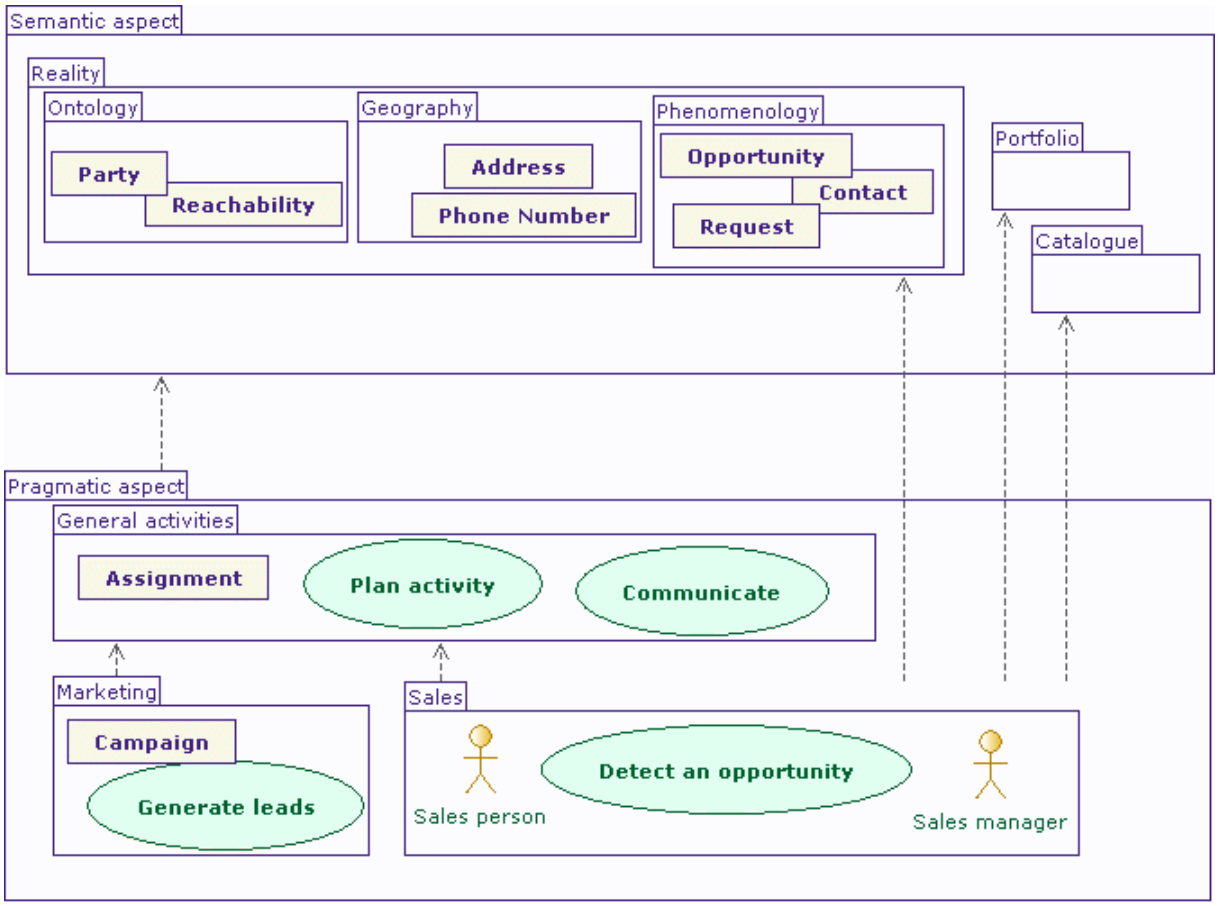

Figure 6 Positioning the "Sales" domain

This diagram focuses on the dependencies of the "Sales" domain.
The classes and use cases it shows are just a selection for illustrating the logic of the architecture.

a) The "Sales" domain inherits general activities from the "General activities" package. This dependency is an exception to the rule that forbids dependencies among functional domains. It is justified by the nature of its contents: the resources of this package are factorized services, which can equip many activities.
b) There is no link between "Marketing" and "Sales" domains, in compliance to the architectural rules. The functional domains communicate only through business objects they share from the semantic aspect. This is a crucial point of the methodology, motivated by the concerns of complexity, agility and coupling.
c) The activities of the "Sales" domain manipulate objects from several object domains, mainly: "Reality" (distributors and prospects registered as parties; opportunities and contacts; information from Portfolio and Catalogue).
d) Sales activities access offers from "Catalogue" domain and customer situations from "Portfolio" domain, only for consultation.

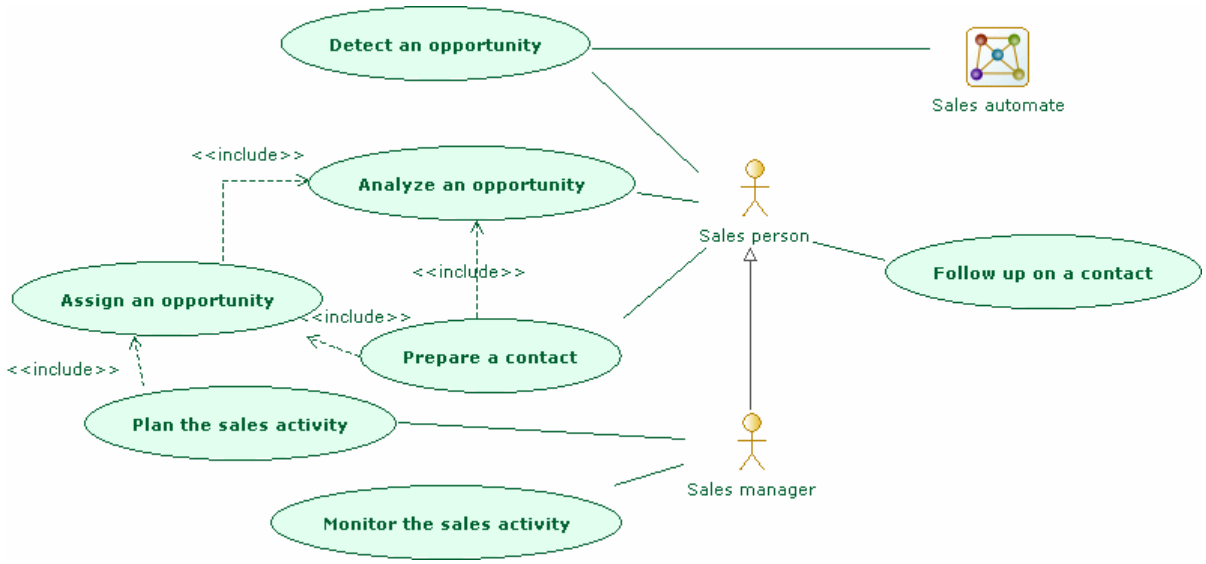

Figure 7 Organizational assumptions for lead management

This diagram proposes a work distribution among the sales personnel.
The icons represent logical roles (please refer to the definition of each role).

Owned Use-Cases	Description
Detect an opportunity	
Analyze an opportunity	
Assign an opportunity	
Plan the sales activity	
Monitor the sales activity	
Prepare a contact	
Follow up on a contact	

Table 5 Owned Use Cases of the package "Sales"

Actors	Description
Sales person	"Sales person" is a logical role, whatever the actual organization is. For instance, an internal sales agent may assume the "sales person" role, as well as a third-party or a call center.
Sales manager	"Sales manager" is a logical role and may be combined with other such logical roles to specify an actual organizational role. The sales manager is defined as a sort of sales person. That is the meaning of the generalization relation between both roles. As a result, the sales manager inherits every right on use case that is specified at the sales person level. The organizational principle states: what a subordinate can do, the manager is allowed to.
Sales automate	The Sales automate represents the automated part of the system. It can trigger and execute procedures in order to better exploit the information we have and to gain value from it. It prepares the tasks, for instance by detecting new opportunities from local databases or by proceeding to automatic text recognition or first analysis of received messages...

Table 6 Owned Actors of the package "Sales"

6.1 Use case "Detect an opportunity"

While "Generate leads" (in the "Marketing" domain) creates bunch of opportunities, the "Detect an opportunity" use case operates at an individual level.
The sales person chooses a party or a portfolio of customers or prospects. Then he/she executes tooled analysis that will identify possible sales opportunities.
Another scenario occurs when the opportunity is received from outside, for example through a direct contact with a party.
When receiving mails or calls or forms... the information will be shaped as an opportunity.

As far as possible, the opportunity is connected to an existing campaign.

Name	Description
record an opportunity ()	
import a file ()	
clone an opportunity ()	
compute the party situation ()	
export ()	Purpose: potential use outside the system or for preparing downgraded mode.

Table 7 Operations of Use case "Detect an opportunity"

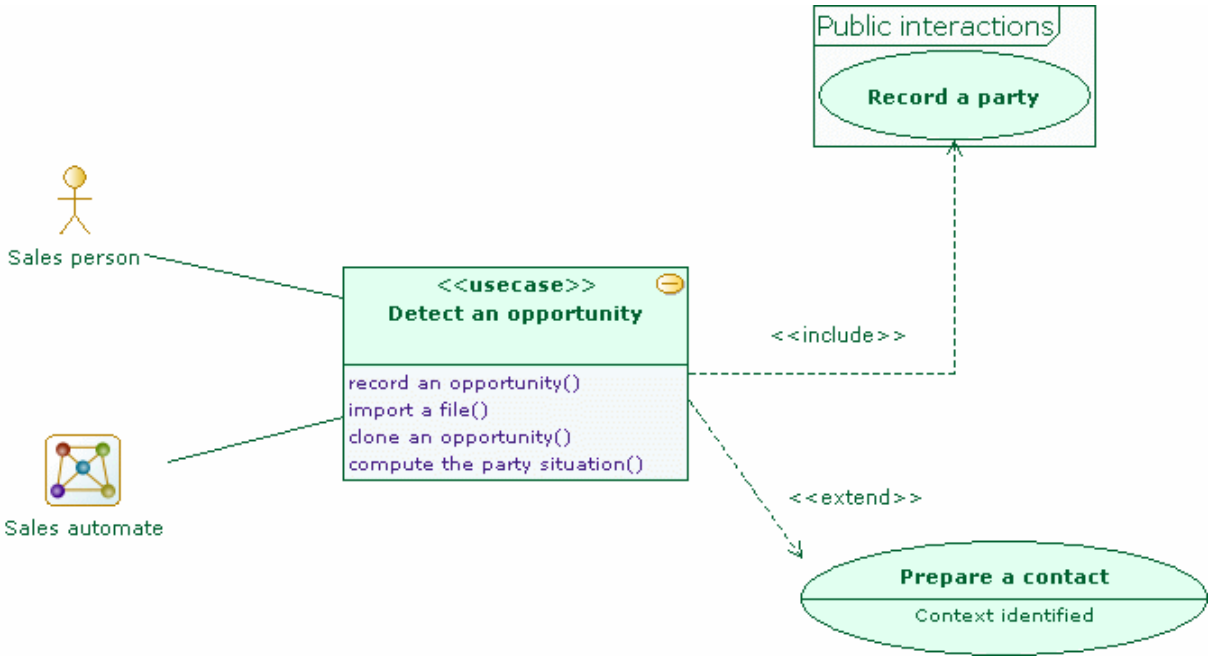

Figure 8 Positioning the "Detect an opportunity" use case

The use case covers two main usages:
- manual mode for entering a new opportunity and possibly a new party in the data base;
- automatic mode for analyzing a party situation and deducing potential interest.

An execution of the use case may combine both modes.

The automatic mode is launched in these circumstances:
- on a regularly basis, by the Sales automate (for example, every night in order to prepare work for the next day);
- on demand, by the collaborator;
- when an extension point is reached inside other use cases, in order to complement the preparation of an action.

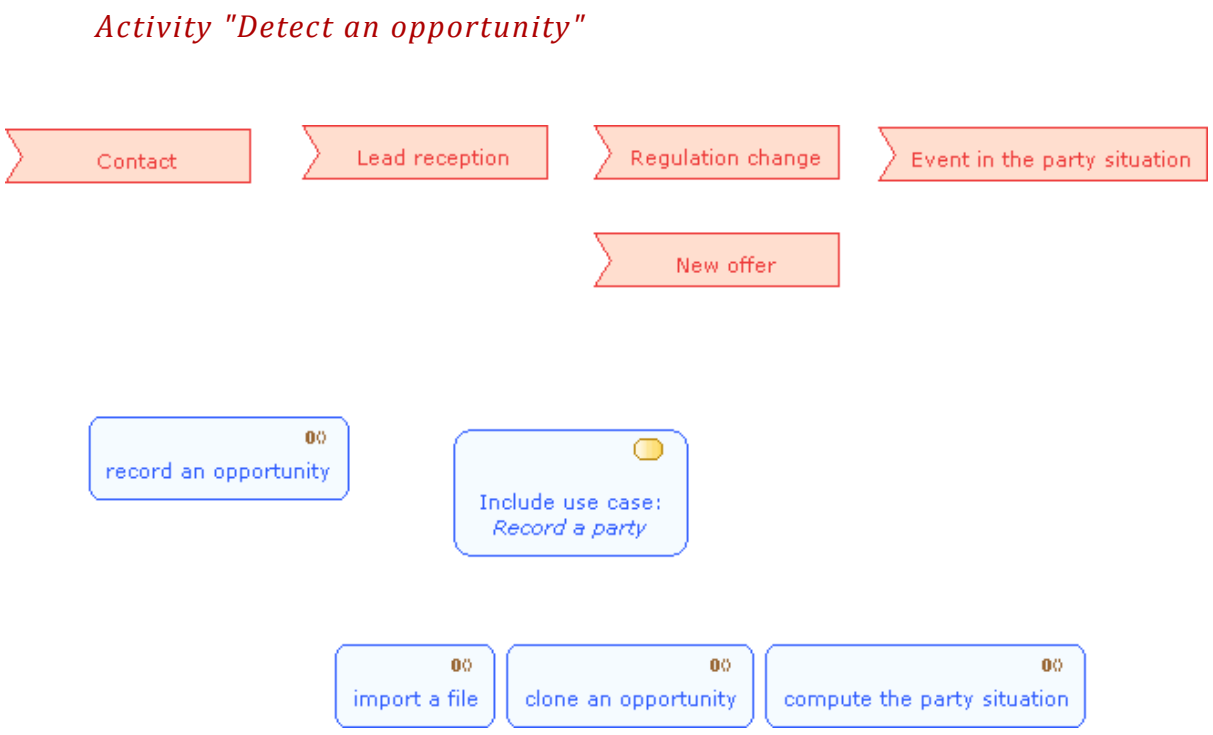

Figure 9 Procedure for detecting an opportunity

<<this diagram has to be completed >>
This diagram summarizes the events that can cause an opportunity in the scope of a given party.

6.2 Use case "Analyze an opportunity"

Once an opportunity has been created (either automatically generated or manually entered), the assigned person needs to put it under further examination. This analysis may take place in different context:
- When a person has been tasked with an opportunity, he/she may prepare their work by a close examination, looking at various feature: geographical location (for optimizing travels), time reachability, content of the request or offer (that may trigger a need for further information)...
- When a manager is distributing the tasks, he/she may want to adjust the opportunity features with their people skills.

Assess value.
Take action.
Create other opportunities in case there may be several parties interested.

Calculate the price of the opportunity and the cost of the previous contacts (factors include: campaign, source channel, time spent, awards, commission/compensation).

Name	Description
cross with other opportunities ()	

Table 8 Operations of Use case "Analyze an opportunity"

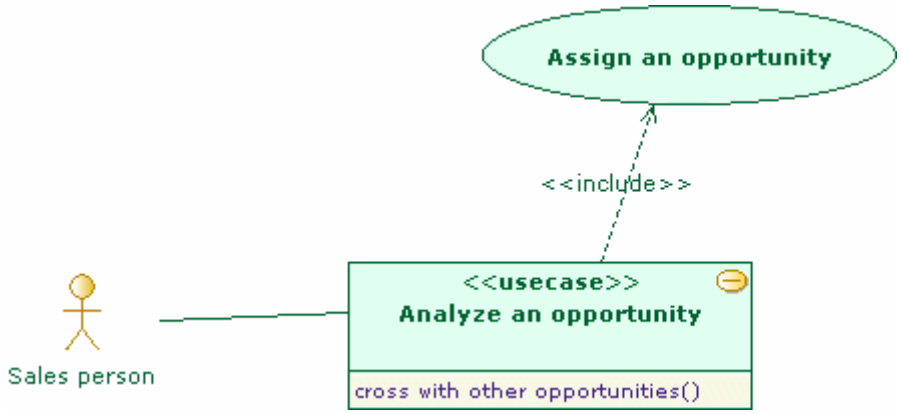

Figure 10 Positioning of "Analyze an opportunity" use case

When analyzing an opportunity, it may happen that the sales person understands there is another person better suited for the case. Hence the "include" relation enables the former to assign the opportunity to the latter.
(see the scenario in the description of "Assign an opportunity".

Activity "Analyze an opportunity"

6.3 Use case "Assign an opportunity"

This use case results in the instantiation of a link between an opportunity and a sales person.

The features of the opportunity are set against the skills of the team members, in order to find the optimal distribution.

Scenario: assignment by a sales person (not by the manager) => particular state of the assignment (like "proposed" ; => to be reviewed or confirmed by the manager and accepted by the other person who is being assigned).
A reallocation can target an entity rather than a person. For instance, another agency when discovering a mistake in the routing rules (allocation to a wrong geographical zone).

Scenario: escalade = the opportunity is reallocated to the manager.

Name	Description
specify criteria for opportunities ()	Sets the value of the "opportunity criteria" attribute.
specify criteria for people ()	Sets the value of the personnel criteria" attribute.
Opportunity search opportunities ()	Apply the criteria that have been specified in the corresponding attribute and search opportunities.
Party search people ()	Apply the criteria that have been specified in the corresponding attribute and search people matching the criteria.
search assignments ()	This operation searches the pending assignments that possibly exist: - if the actor of the use case is a manager, search for assignments that have to be validated in the team; - if not, search only for assignments the actor owns.
identify an opportunity (IN the_opportunity Opportunity)	
identify a person (IN Parameter Party)	The operation receives the selected person instance and sets the corresponding attribute.
identify an assignment (IN the_assignment Assignment)	An assignment identifies a person and an opportunity. Both attributes are set up on the use case.
assign ()	The operation instantiates the Assignment class, based on the instances of person and opportunity that have been selected (through the attributes of the use case).
approve the assignment ()	This operation is for changing the status of an assignment.

Table 9 Operations of Use case "Assign an opportunity"

Name	Description
opportunity criteria : [1..1] string	Criteria are recorded for use during the execution and for further executions of the same use case. The string of characters contains the criteria that the actor has specified for the search of opportunities.
opportunity selected : [1..1] string	Contains the information about the opportunity which has been selected in the course of the use case.
personnel criteria : [1..1] string	Criteria are recorded for use during the execution and for further executions of the same use case. The string of characters contains the criteria that the actor has specified for the search of people.
person selected : [1..1] string	Contains information about the person that has been selected for receiving the assignment.

Table 10 Attributes of Use case "Assign an opportunity"

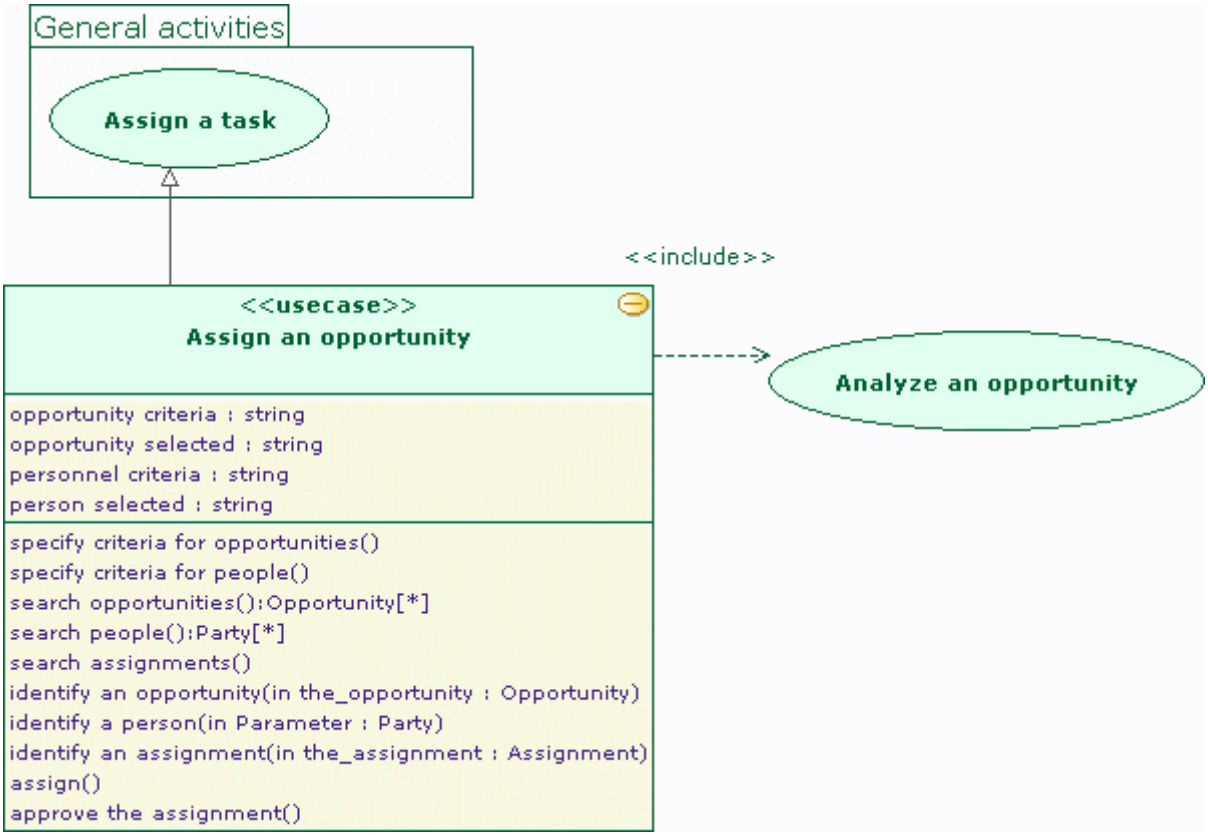

Figure 11 Positioning the "Assign an opportunity" use case

Assigning an opportunity is a specific case of assigning a task. It proposes the same sequence of actions, only restricted to specific objects:
- the tasks are limited to the management of an opportunity;
- the actor in charge of the task is supposed to be a sales person.

Two types of actors may execute this use case:
- mainly the sales manager (of an agency) who plans the activity of their team;
- occasionally, a sales person when preparing an action and estimating that a colleague of his/her may be better qualified for the given opportunity.

These contexts are described through distinct scenarios.

The "includes" relation to "Analyze an opportunity" allows the actor to examine the opportunity features and it may help to make his/her decision when choosing the right person.

Activity "Assign an opportunity"

State Machine "Automate for assigning an opportunity"

State Name	State Description
FinalState	
FinalState	

State Name	State Description
FinalState	
FinalState	
FinalState	
FinalState	
FinalState	
assigning	
assignment selected	When an assignment is selected, the person (sales person) and the opportunity are identified.
confirming the assignement	
confirming the assignment	
consulting information about the opportunities	What skills are required, depending on the offer that is promoted. What context...
consulting personnel profiles	Among the features to be considered, we find: - the availability of the people; - the skills in relation with the offer or segment; - the customer or prospect targeted by the opportunity (proximity, sales person's portfolio...).
creating the assignment	
identification	The user identifies himself/herself. If there is a previous execution that has been interrupted, the system proposes to resume it. Modeling decision: Design the generic pattern for use cases. It will be incorporated in the logical machines of the "Operation" stratum.
opportunities listed	
opportunity selected	
people identified	
person selected	
preparing the task	The state contains two regions since the search can indiscrimentally start with the opportunities or the people.
searching opportunities	
searching people	
searching the pending assignment	
selecting a preexisting assignment	A scenario of this use case occurs when the actor want to review pending assignments and possibly validate one. This state precisely covers the circumstance.
selecting the objects	The state contains two regions since the search can indiscriminately start with the opportunities or the people.
specifying criteria for opportunities	
specifying criteria for people	
validating the assignment	

Table 11 Automate for assigning an opportunity

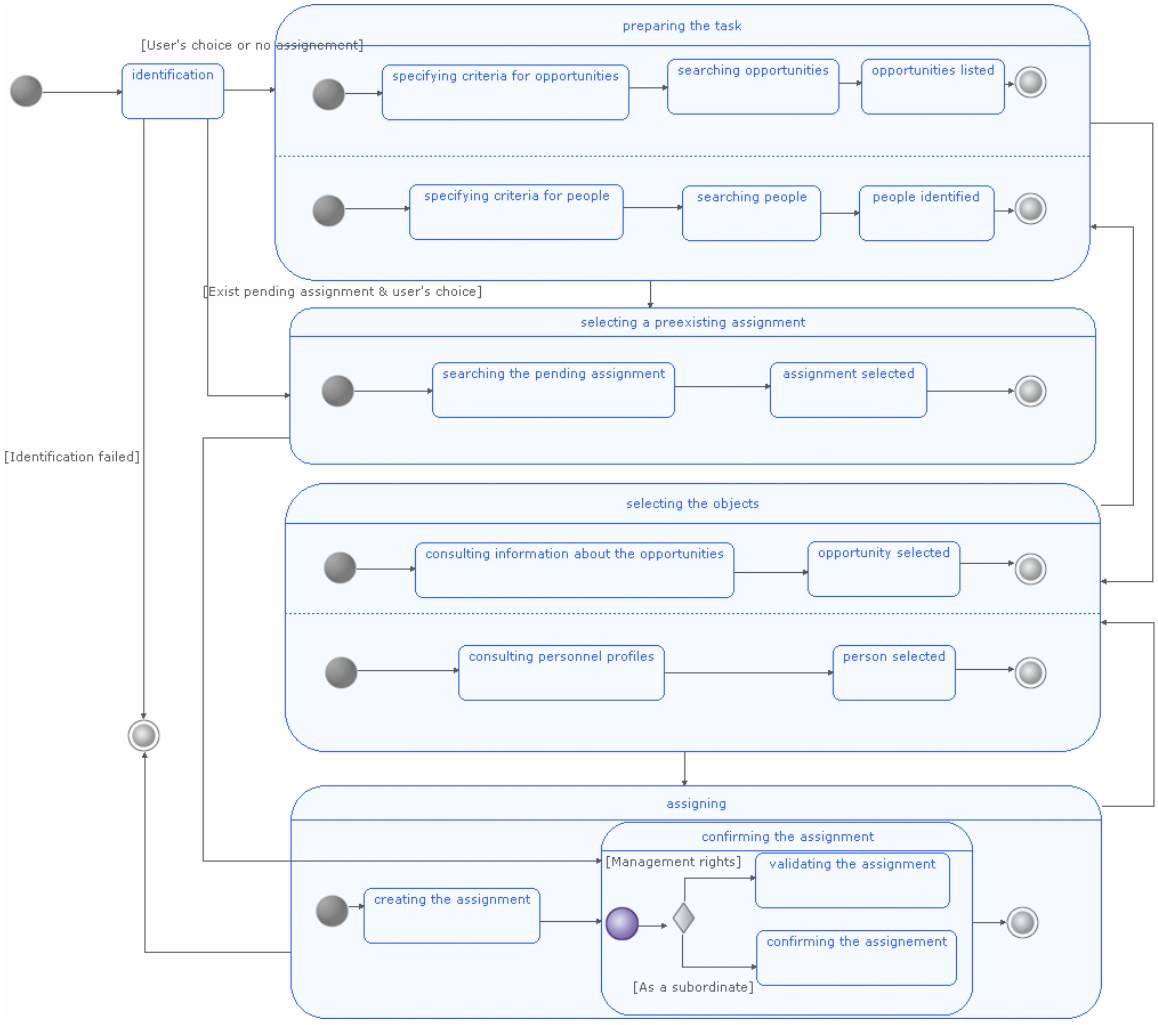

Figure 12 Automate for assigning an opportunity

The procedure for assigning an opportunity may follow various courses, starting by the selection of an opportunity or a person. Rather than solidifying the flow of action, a better solution consists in describing the conditions via a state machine. That is the purpose of this diagram. Describing procedures this way - by means of state machines -, we preserve the user's liberty and suggest smoother interfaces.

The states are mainly named with gerunds. This expresses the nature of this particular representation: we are describing the actions in the course of the use and the minimal logic that these actions must obey. The states are parts of the procedure. When the actions are closed, we assume that the conditions reached are verified in the following states.
For instance, when the action of specifying criteria is closed, the criteria are known and kept through the next steps: searching, objects identified...
All use cases are based on the same template: the state is stored as well as the information defined as attributes of the use case, so that, in case of interruption, the use case can resume in same conditions.

About the transitions
The guard conditions are expressed when necessary. They can cover user's choice when it is up to

the user to decide between two possible actions, or internal condition of the system.
Transitions that carry no condition are automatic transitions, meaning that the process can reach the next step as soon as the activity of the previous state is over.
Moreover, the procedure can be interrupted at any time, either by user's will or by unpredictable event. In both cases, the state and related information are kept for resuming the use case in further attempts.

6.4 Use case "Plan the sales activity"

This use case exceeds the scope of lead management. It deals with the diary of the members of the team or agency.
On one hand, the manager is presented with the list of opportunities as well as other potential tasks or operations. On the other hand, the use case gives access to the public diaries of the personnel. Taking into account the availabilities and the time constraints, the manager plan the activity.

Two approaches are proposed:
- An interventionist approach, where the manager himself fixes the tasks and dates for their team.
- A delegation approach, where the manager establishes objectives and the subordinates schedule their own tasks.

Part of the planning activity can be automated and rely on assignment rules (priority of action, classification of collaborators, qualification of opportunities, etc.). The use case includes the specification of these rules by the manager.

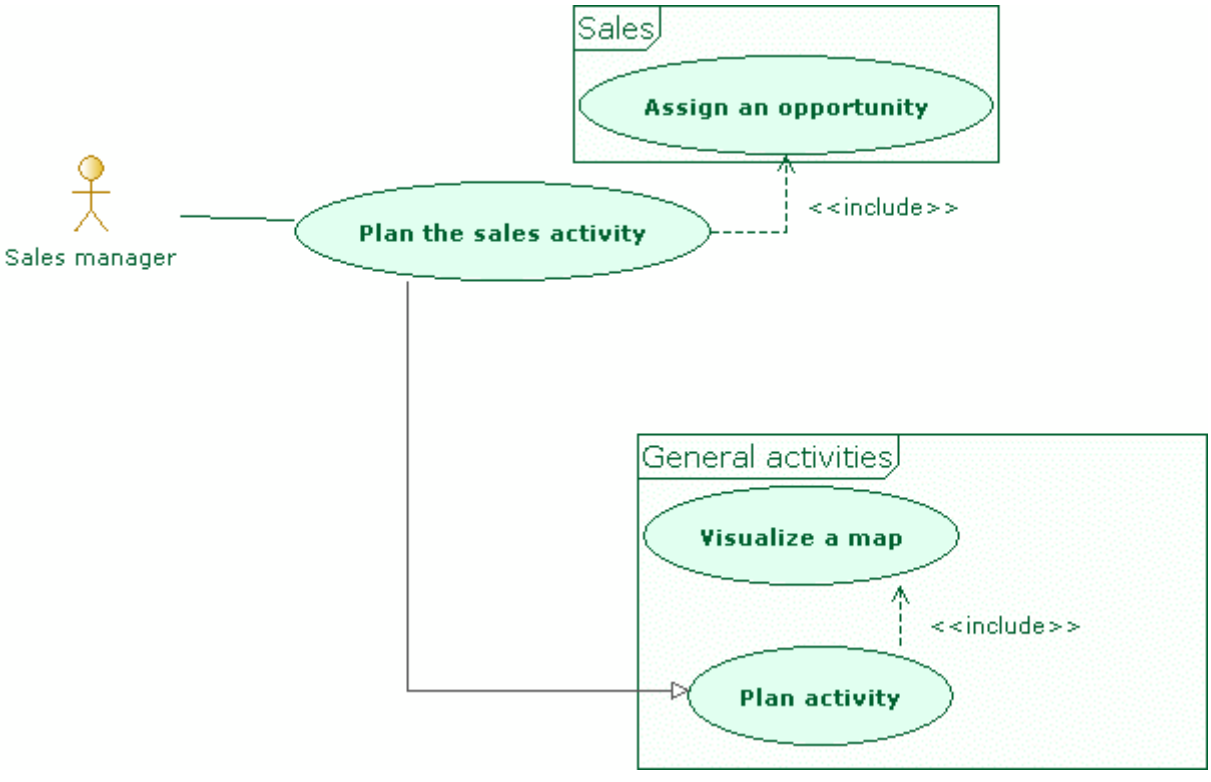

Figure 13 Positioning the "Plan the sales activity" use case

Planning sales activity is a case of activity planning, dedicated to sales activity and the business objects implied (for example: opportunities, contacts).

6.5 Use case "Monitor the sales activity"

The use case is designed around the dashboard of the team or agency.
Among the indicators to be presented, several are related to lead management. They include:
- number and status of opportunities;
- success ratio;
- status of the tasks;
- warning when repeated unsuccessful attempts...

Regarding lead management, the dashboard reflects the semantics of opportunity. Graphical representations facilitate the interpretation:
- charts per types;
- time line;
- color-coded representations corresponding to the states of the Opportunity state machine (pending, successful, etc.);
- geography and distribution of the contact portfolio;
- etc.

The use case includes administration tasks:
- specifying the parameters and rules for automatic activity (detection, routing, indicators...);
- archiving and cleansing;
- import/export...

Modeling decision:
Monitoring may integrate the "Plan..." use case. Indeed, when drawing conclusions from the dashboard, the manager may certainly want to act.

6.6 Use case "Prepare a contact"

The purpose of this use case is to get information and arguments that will give the best chances of success to the upcoming contact with a party.

Name	Description

Name	Description
Consult schedule ()	When a use case is executing, the actor involved is identified. The "Consult schedule" operation consists in loading and displaying the actor's schedule. The user can adjust the presentation, selecting: - the period, - the time span (day, week, month). The schedule contains tasks and dates, some referring to scheduled contacts. In addition to the scheduled actions, the schedule shows the list of tasks that have not yet been scheduled but are assigned to the actor.
Consult list of opportunities ()	Opportunities are not tasks and, therefore, they are not displayed on the schedule unless dedicated tasks have been created. So, this operation provides the actor with the list of opportunities that have been assigned to him/her.
Select task or opportunity ()	
Consult customer's situation ()	
Study the offer ()	
Prepare sales argument ()	
Determine possible time slots ()	This operation takes heed of the time preferences that have been recorded for the party (generally: reachability conditions).
Propose dates ()	
Incorporate other potential opportunities ()	

Table 12 Operations of Use case "Prepare a contact"

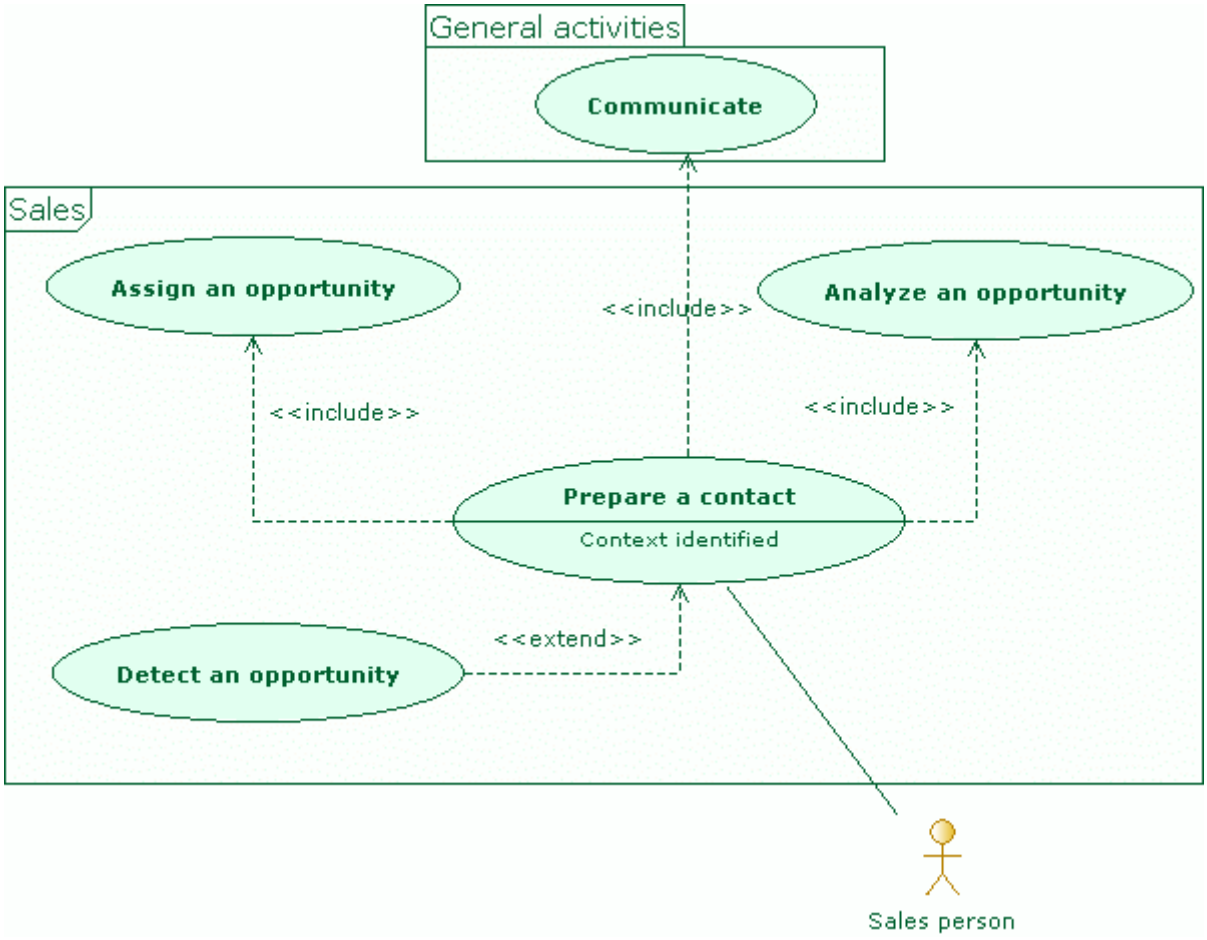

Figure 14 Positioning the "Prepare a contact" use case

a) The use case can be executed independently, out of any context of marketing operation or lead management.
b) When the contact follows an opportunity, the preparation may take advantage from a closer look to the opportunity. Hence the inclusion of the "Analyze an opportunity" use case.
c) It may happen that the sales person decides that another one is better qualified for the contact. In such exceptional circumstances, he/she has the possibility to re-assign the opportunity. That is the reason why there is an "include" relation to the "Assign an opportunity" use case.
d) The preparation may entail a communication toward the party that will be contacted or toward another collaborator. The "Communicate" use case can be executed several times for different receivers. A content of the message is automatically prepared depending on the type of the receiver (internal vs external) and on the communication channel.
e) The use case contains an extension point marked "Context identified" (see the description of this stage in the process). As soon as this point is reached, the system triggers the opportunity detection, based on the information of the context. It then presents the sales person with the potential opportunities that may complement the contact preparation.

Modeling decision:
About (c): The inclusion of "Assign an opportunity" could reveal itself as a lead-centric view. Maybe it could be enlarged to "Assign a task", as "Prepare a contact" may occur in other contexts than lead management.

About (e): In this scenario, "Detect an opportunity" is fully automated and must not disturb the current use case. That is possible, thanks to the description of the context. The secondary use case (Detect an opportunity) executes in an asynchronous mode. Another extension point is needed in order to display the results, if any.

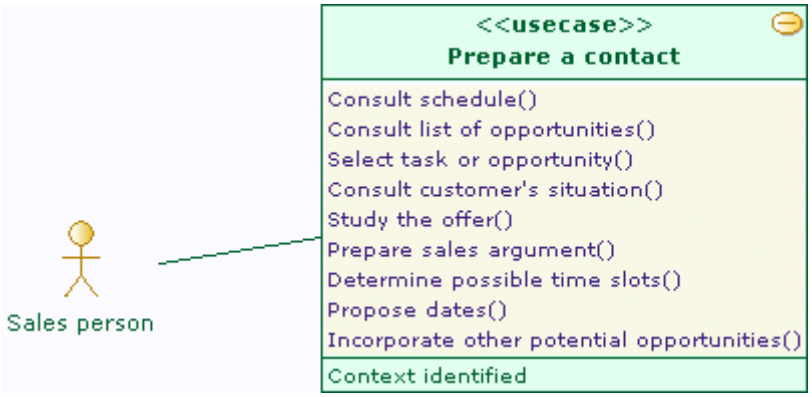

Figure 15 Content of the "Prepare a contact" use case

Activity "Prepare a contact"

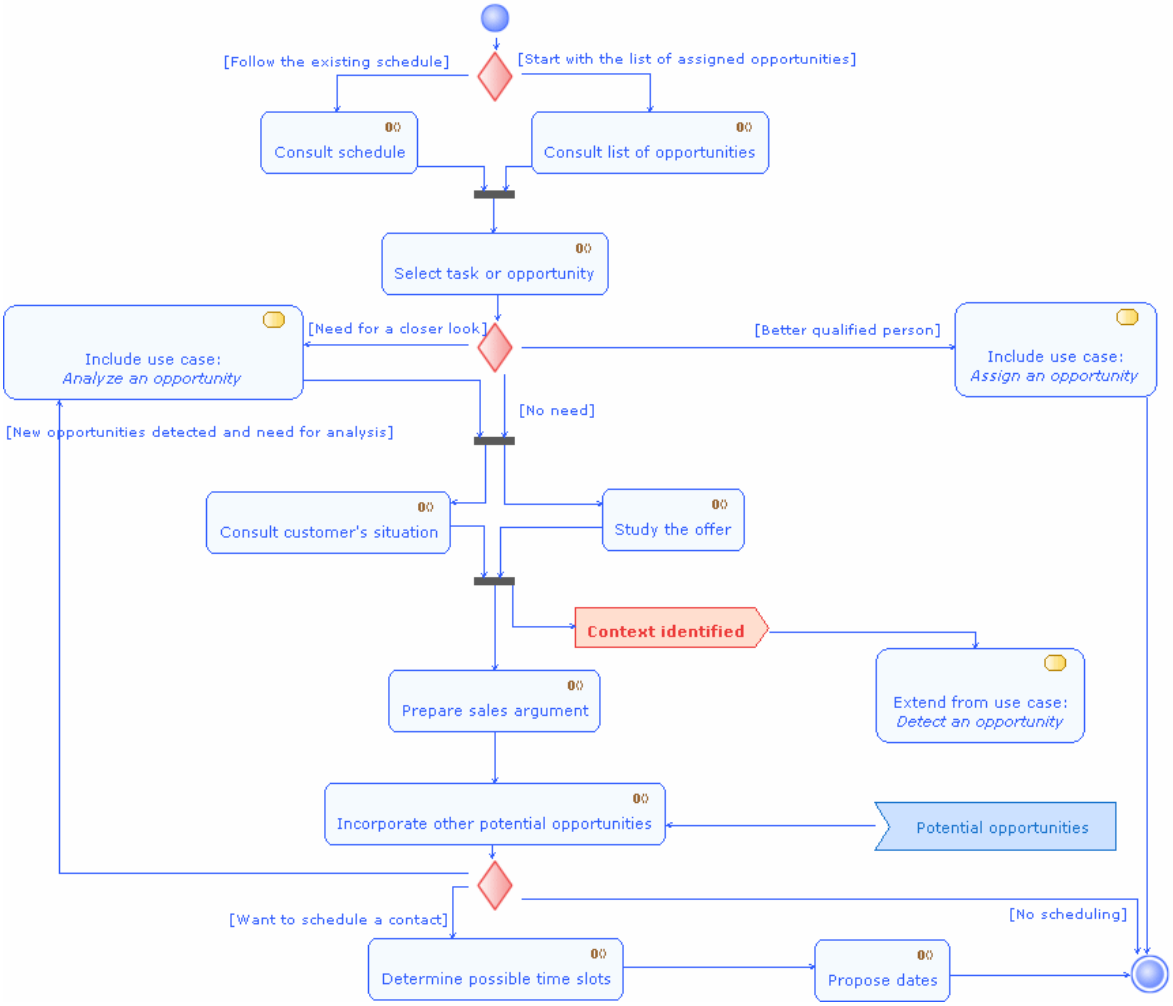

Figure 16 Procedure for preparing a contact

The rounded rectangles of this picture stand for activities that the user might undertake.
The activity diagram shows the sequence of actions.
The "o()" sign marks actions that equip the current use case. Such actions imply participation from the user (selecting, entering information, validating...) and may embed automated answers from the system. For more information about the interaction, please refer to the documentation of the operations, which are inscribed on the use case.
In this representation, the red diamond indicates a user's decision.

On this picture, two rectangles mention other use cases. Indeed, in the course of this procedure, secondary use cases may add services:
- The included use case allows for a closer look on the opportunity (see the documentation of the "Analyze an opportunity" use case).
- When the procedure comes to the point where the context is perfectly identified (point of extension), it emits a signal that triggers the "Detect an opportunity" use case. This use case may discover other opportunities. In this event, the potential opportunities are incorporated in order to enrich the potential contact. In some case, this can lead to another execution of the "Analyze an opportunity" use case.

Here is the story:
a) The user selects an opportunity which he wants to take advantage of. He/she can do so either by selecting it in the list of his/her assigned opportunities, or by looking at his/her own schedule where they can find tasks related to opportunities.
b) Once the opportunity has been selected, the user can analyze it. This action is not mandatory, since there can be no need of it when the sales person knows enough about the client and the offer. The sales person may exceptionally consider another person of the team is better qualified for exploiting the opportunity. In this case, the "Assign an opportunity" use case is triggered and the preparation ends up.
c) Then, the use case proposes tools for examining the customer (or prospect) situation and for learning more about the offer or campaign.
d) At this point (formalized as an extension point of the use case), the system launches another use case for detecting other possible opportunities. The purpose is to increase the value of the contact by assessing the client's situation. The extending use case ("Detect an opportunity") executes in background, without disturbing the preparation. In case it discovers new opportunities, it raises an event that will be incorporated in the sales argument and could lead to other analyses.
e) In the meanwhile, the actor elaborates the sales argument, merging information from the client situation and features of the promoted offer or the campaign.
f) The use case reaches an end with the determination and communication of possible dates for a contact. These actions may be omitted

6.7 Use case "Follow up on a contact"

This use case enables the sales person to record the result of an action.
It is based on a generic use case for following up on activities of any kind. It gives access to the

person's diary and other facilities in link with the sales activity. Among them stand:
- create another opportunity (as a result of information gained through the contact);
- assign an opportunity (for proposing the new opportunity to colleagues or reallocating the original opportunity to another person);
- establish a proposal;
- plan actions in the wake of the contact...

7 Package "Claims management"

from Package AXA_Transversal_Repository.Pragmatic aspect

8 Package "HR management"

from Package AXA_Transversal_Repository.Pragmatic aspect

9 Package "General activities"

from Package AXA_Transversal_Repository.Pragmatic aspect

This functional domain gathers activities and tools that may serve many business activities. It is not dedicated to a specific business objective but provides common facilities.
Examples include:
- schedule;
- role definition;
- organization.

Modeling decision:
As far as possible, we avoid dependencies between functional domains. "General activities" escapes this rule, precisely because its role is for sharing common instrumental activities serving functions. As this domain is referred to by other functional domains, it must absolutely contain no organizational choices. Therefore, it factorizes generic use cases covering general activities but it doesn't mention any role or type of actors, with the exception of the very generic role: “collaborator”.

Modeling decision about the objects:
Several classes have been located in this domain, since they express notions that pertain to organization. Nevertheless, it is possible that these notions are generic enough and should therefore populate the semantic aspect.
To be decided in consideration of the possibility for developing an "organizer" component...

Owned Classes	Summary
Assignment	The fact that a task or responsibility is assigned to a person. The resulting mandate. Assignment pertains to the pragmatic aspect. That is the reason why the class is located in this functional domain. Candidate states: proposed, to be confirmed, validated...
Task	

Table 13 Owned Classes of Package "General activities"

Owned Use-Cases	Description
Assign a task	
Plan activity	
Monitor an activity	
Communicate	
Visualize a map	

Table 14 Owned Use Cases of the package "General activities"

Actors	Description
Collaborator	This generic role is factorized in the "General activities" package and can be reused anywhere in the other domains, each time no restriction of role constrains an activity.

Table 15 Owned Actors of the package "General activities"

9.1 Class "Assignment"

from Package AXA_Transversal_Repository.Pragmatic aspect.General activities

The fact that a task or responsibility is assigned to a person.
The resulting mandate.

Assignment pertains to the pragmatic aspect. That is the reason why the class is located in this functional domain.

Candidate states: proposed, to be confirmed, validated...

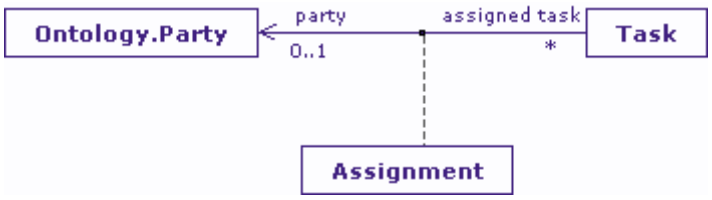

Figure 17 Semantics of Assignment

9.2 Class "Task"

from Package AXA_Transversal_Repository.Pragmatic aspect.General activities

Name	Description
->party : [0..1] PartyPartyPartyPartyParty	

Table 16 Associations of Class "Task"

9.3 Use case "Assign a task"

This generic use case allows for linking a party with an action or an opportunity or any topic.
It is parameterized with the type of the task, so that more specific use cases that inherit from "Assign a task" may restrict the use and apply it to specific object.
The logic of execution always remains the same:
- identify the object to be assigned (task, action, opportunity, topic...);
- designate the actor who will assume the task (a party, either individual or collective);
- create and store the link between both instances.

Template parameters:
1 task type:

The type of tasks which the use case (or its specialized use cases) will apply to.
The parameter receives a string of characters that provides the name of a class. This name is then compared to the type of objects to be assigned.
2 object location: Modeling decision:
Not only the type but also the location of the objects is function of the specialized use cases. This can be implemented as another parameter of the generic use case.

9.4 Use case "Plan activity"

This use case is for personal or collective activity planning.
It provides generic facilities covering:
- objective formulation;
- scheduling;
- dashboard focused on activity.

Its parameters allow for specifying the scope.
Template parameters:
1 individual: This boolean attribute distinguishes:
- individual use (: the use case applies to the person's diary;
- collective use
2 responsibility scope

9.5 Use case "Monitor an activity"

This generic use case proposes services for following up an activity. It is meant for activity monitoring, with dashboards focused on activity.
(It doesn't apply to other fields, like process or financial dashboard.)

Some features to be considered:
- calculation of workload (individual / collective; period; anticipation...);
- determination of recurrent patterns;
- recording vacation;
- etc.

9.6 Use case "Communicate"

Generic use case that gathers services for communication purpose, whatever the communication channel.
The user chooses the channels (there can be many of them). He/she specifies the target of the communication: the party.
The content of the communication (i.e. the message) is built during the execution of the use case. It

can exploit contextual data provided through the attributes of the use case.

A message can target one or many parties.
It can be based on a template (a generic message). This reference can be static or dynamic. If dynamic, the message adapts to any change in the template, till it is sent.
Etc.

Name	Description
context : [1..1] string	As the "Communicate" use case is called in various context, by different functional situations, knowing the context enables it to better fit the needs. The context conveys information that make sense when set against the message template.
message template : [1..1] string	contains the documentation template that is used for shaping the message. Such a message template must take into account the following factors: - it provides the text and structure that define the meaning of the context data (see the "context" attribute); - it adjusts to the communication channels that the user will select through the execution of the use case; - it refers to the physical templates, which are established for a given communication channel and assemble the text and data with other elements like logo, common texts...

Table 17 Attributes of Use case "Communicate"

9.7 Use case "Visualize a map"

The use case is particularized with its parameters, so that it builds a proper map:
- geographic zone;
- objects to be placed on the map.

The map is active, meaning that the user can adjust the image (portion, zoom, move...) and that he/she can access the information related to the displayed objects.

10Package "Public interactions"

from Package AXA_Transversal_Repository.Pragmatic aspect

This functional domain covers all possible interactions between the public - customers, prospects, visitors... - and the enterprise.
It hosts:
- information services proposed to the public,
- customer relationship management,
- communication activity.

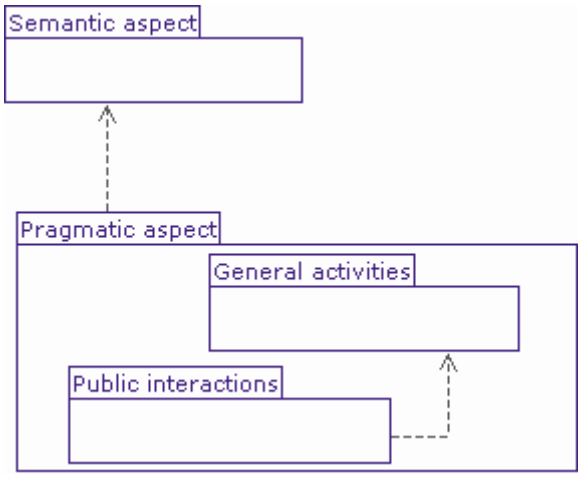

Figure 18 Positioning of the "Public interactions" package

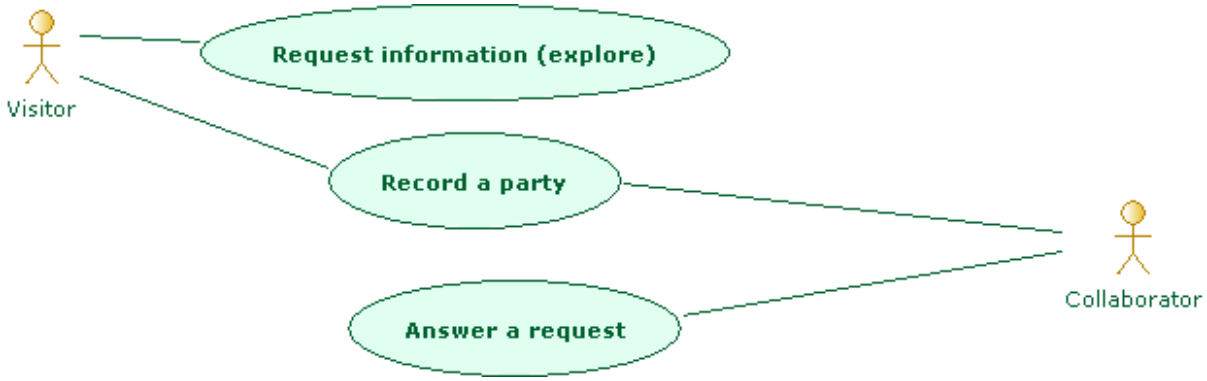

Figure 19 use case diagram for Public interactions

Owned Use-Cases	Description
Request information (explore)	
Record a party	
Answer a request	

Table 18 Owned Use Cases of the package "Public interactions"

Actors	Description

Actors	Description
Visitor	This logical role applies to parties that interact with the enterprise, whatever the purpose and manner are. Internet visitor, prospect visiting an agency or sending a request, people met in various circumstances... The role may cover prospect or client or any person or entity from the outside.

Table 19 Owned Actors of the package "Public interactions"

10.1 Use case "Request information (explore)"

10.2 Use case "Record a party"

Record a party, person or organization...
Check for avoiding duplicates.
Possibility for linking the party with other ones.

Activity "Record a party"

10.3 Use case "Answer a request"

11 Class index

12 Use cases index

Rev	Date	Auteur	Description