Visio Customer Solution Case Study

Visio

Organizational Transformation Experts Use Diagramming Tool to Deliver Insights

"We will use Visio Professional 2013 to save customers time during restructuring projects, increasing their satisfaction. With Visio 2013 as an integral part of Malik VSMi, we expect to increase our business."

Maria Sourla, Project Manager, Head, Competence Center of Organizational Restructuring, Malik

Malik uses the Malik Viable System Model® (VSM®) for organizational restructuring. To simplify this complex process, Malik included Microsoft Visio Professional 2013 diagramming software. Experts and customers simultaneously coauthor Visio diagrams that link to organizational data stored in Microsoft SharePoint Server 2013. Visio 2013 adds value to the VSM solution, Malik VSMinteractive® (VSMi®), improving customer results and time-to-benefit.

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Situation

Malik helps customers acquire the skills and competencies required for organizational leadership. Malik complexity management experts are developing a tool, the Malik VSMinteractive® (VSMi®), to support customers throughout the restructuring project. Restructuring projects generate a lot of information—organizational structures, processes, and job descriptions—that VSMi compiles in documents and spreadsheets and stores in Microsoft SharePoint Server lists. Malik wanted a diagramming tool that linked to this data and that would streamline the collaboration required between the expert and the customer as they create restructuring strategies and designed business processes to support the new organization.

For the first iteration of VSMi, Malik used Microsoft Visio 2010 drawing and diagramming software. This scenario required a third-party tool for connecting the diagrams to customer data stored in the SharePoint Server lists. Collaboration on the diagrams required sending them back and forth to the customer as email attachments and manually merging versions. This was not an efficient communications platform for a solution tool that Malik hoped to use with customers around the world.

Malik wanted to make active information exchange with customers a core part of VSMi. "We wanted to collaborate in real time to update the diagrams and store the new information in SharePoint Server lists—without having to use a third-party tool," says Maria Sourla, Project Manager and Head of the Competence Center of Organizational Restructuring at Malik. "The more efficient the coauthoring capabilities we could offer and the more professional

our diagrams looked, the more marketable VSMi would be."

Solution

Malik works with oneAssist, a member of the Microsoft Partner Network with Silver competencies, on the development of the VSMi tool. oneAssist, represented by its Managing Director, Senaj Lelic, recommended Microsoft Visio Professional 2013 to Malik for the next iteration of the tool. "The latest version of Visio is a natural fit for VSMi because it enables teams to coauthor diagrams and comment on individual shapes simultaneously," says Lelic. "Malik and its customers can link Visio Professional 2013 diagrams to VSMi organizational data stored in Microsoft SharePoint Server, and customers can view their diagrams via most browsers using Visio Services, a SharePoint Server 2013 service application. The new collaboration and coauthoring environment of Visio Services 2013 allows a quicker discussion and optimization of the data collected."

"We saw the potential of Visio 2013 to support the complex management solutions and planning that we wanted to accomplish with VSMi," says Dr. Karl-Heinz Oeller, Head of Research and Development and Senior Partner at Malik. "We also liked the improved themes and updated shapes that give Visio 2013 diagrams a professional appearance."

In 2012, oneAssist began working on the next iteration of VSMi. The partner took advantage of the new file format in Visio 2013 to deploy the diagramming software as a full-featured graphical engine embedded within the VSMi tool. "The new file format allows us to take advantage of the coauthoring and commenting features," says Lelic. "We developed rules in Visio Professional 2013 to create a custom validation engine to conform to VSM rules.
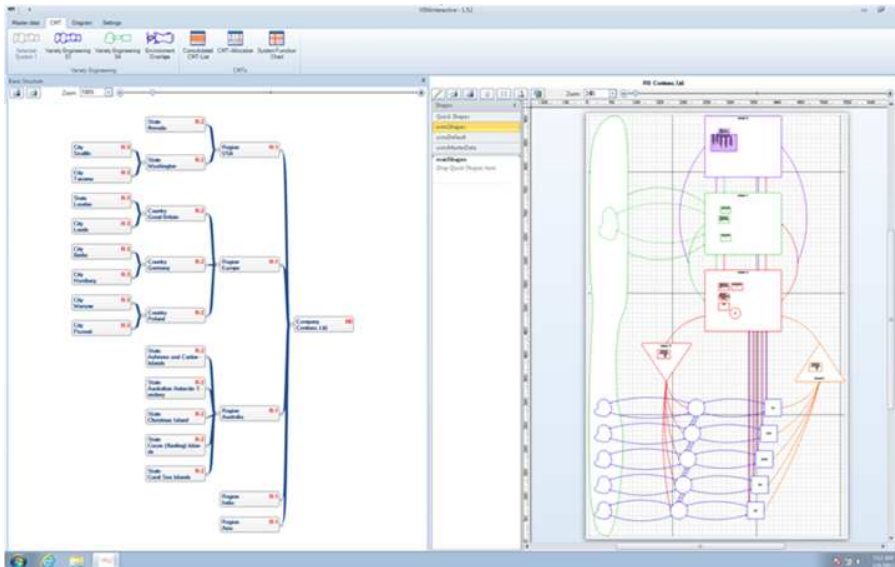
Figure 1 – Malik uses Microsoft Visio Professional 2013 diagramming software to facilitate collaboration with customers on restructuring projects. The left side of the diagram illustrates an organization's basic structure, while the right shows an in-depth visualization of a single element from the left.

This makes it easy for customers to adhere to Malik principles throughout the restructuring project."

When this latest version of VSMi is ready for the market, Malik and its customers will use Visio Professional 2013 diagrams throughout the solution process. "When needed, Visio diagrams are created on the fly and, using Visio Services, stakeholders can collaborate on the diagrams and refine the restructuring process according to each customer's needs," says Lelic. "Because the diagrams are linked to the SharePoint Server lists, all changes are updated and stored there, ready for the next step in the solution process." (Figure 1.)

Benefits

By using Visio Professional 2013 within VSMi, Malik added important new functionality to its tool, increasing its marketability and revenue-generating potential. Benefits include:

- **Improved collaboration.** Malik can use the commenting and coauthoring features of Visio Professional 2013 to collaborate efficiently with customers and better understand their organizations and goals for restructuring. "Using Visio 2013, customers comment on diagram shapes and we get in-depth feedback to improve the solution process," says Sourla. "With a better understanding of customers' expectations, we can improve service."

- **Faster time-to-benefit.** By using Visio Professional 2013 to work together on the same diagram at the same time, customers can expect a more efficient restructuring project and faster time-to-benefit. Coauthoring diagrams means that Malik and its customers can quickly develop optimal organizational change processes for each unique project. The faster this happens, the faster the organizational changes can be updated in SharePoint Server lists and everyone can move to the next phase of the project. Because customers can access and comment on diagrams from most browsers at any time, there is opportunity for collaboration outside the office and regular business hours. Malik is planning on testing the next version of VSMi on tablet computers.

- **Increased competitive advantage.** Malik is taking advantage of new shapes and smooth transitions within Visio Professional 2013 diagrams to improve the look and functionality of VSMi and drive sales.

"With Visio Professional 2013, we can supply customers with the best illustrative navigation tool for complex restructuring projects," says Dr. Oeller.

For More Information

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For more information about oneAssist products and services, call (49) (30) 375 92050 or visit the website at:
www.oneassist.de

For more information about Malik products and services, visit the website at:
www.malik-management.com

"To be competitive, our product has to look good and, with Visio 2013, it does," concludes Sourla. "We will use Visio Professional 2013 to save customers time during restructuring projects, increasing their satisfaction. With Visio 2013 as an integral part of Malik VSMi, we expect to increase our business."

Visio

The new Visio makes it easier than ever to create and share professional, versatile diagrams that simplify complex information. It includes updated shapes, templates, and styles, as well as enhanced support for teams, including the ability for several people to work on a single diagram at the same time.

For more information go to:
Visio.microsoft.com