



Microsoft Office Visio 2003 Customer Solution

Case study

Procter & Gamble Collaborates on Business Processes Globally and Cost-Effectively Over the Web

“Visio 2003 and the Caper eBook add-on enable groups within Procter & Gamble to create and share project initiatives and process maps in a visual manner. With these tools, groups can publish project documents directly to the Web, and teams can collaborate globally using the Web. These tools truly prove a picture is worth a thousand words.”

Kay Bross

Regulatory Information Architect
Procter & Gamble

All businesses—no matter what the size—need cost-effective methods of collaborating on projects and sharing information. At a large corporation like Procter & Gamble, with employees and teams that span the globe, effective team communication is an absolute necessity. GumshoeKI is working with business groups at Procter & Gamble to leverage the familiar drawing and diagramming software tool—Microsoft Office Visio 2003—to create, manage, share, and deliver content over the Web in a universally-recognizable electronic book format. Using the Visio add-on, Caper eBook, Procter & Gamble can create visual content for a project with Visio 2003. It can then organize all the information for a project into chapters and sections, create links among Visio files and files created with other Microsoft Office System software, generate easy-to-navigate table of contents, and then publish everything to the Web. This electronic book approach increases employee productivity by making all project details available on the Web in a simple visual format and all in one location. In the Pharmaceutical Regulatory group alone, team members share content 75% more effectively worldwide.

Procter&Gamble

CUSTOMER PROFILE	BUSINESS SITUATION	SOLUTION	BENEFITS
Procter & Gamble is an international consumer products mega corporation with more than 98,000 employees. Based in Cincinnati, Ohio, USA, Procter & Gamble markets more than 250 products to consumers in 140 countries. Its products include everything from laundry products and toothpaste to diapers and bone disease therapies.	Procter & Gamble needed to more effectively and consistently manage content on the Web so teams across the globe could collaborate and contribute to the process in a more meaningful way. It needed to store all of the documents associated with a particular project in a central location that anyone could access.	With Caper eBook—an add-on for Microsoft® Office Visio® 2003—anyone can easily create, manage, share, and deliver content visually over the Web in a universally recognizable, electronic book format. The add-on organizes the information into chapters, and it automatically generates a table of contents, a What's New section, and search capabilities for the book.	<ul style="list-style-type: none"> Allows subject matter experts to think and communicate in a visual format and take direct ownership of Web content Globally shares content across departments 75% more effectively using the Web Effectively captures key project information and monitors project progress Cost-effectively leverages familiar software tools

“The Caper eBook add-on takes the use of Visio 2003 to a new level of dynamic content management. It facilitates active team collaboration, publishes content in a universally recognized presentation format, and makes Web delivery easy. This broadens the Procter & Gamble audience to include worldwide team members.”

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Procter & Gamble*

Situation

In 1837, The Procter & Gamble Company began as a small, family-operated soap and candle business in Cincinnati, Ohio, USA. Now, more than 150 years later, Procter & Gamble markets hundreds of products to billions of consumers in more than 100 countries. Its broad array of product categories includes everything from laundry products and toothpaste to diapers and bone disease therapies. This product breadth gives Procter & Gamble a deep understanding of consumers' buying habits and product needs. It enables the corporation to innovatively connect consumers' wants with the latest products that technology can deliver.

This innovation is evident internally as well. Procter & Gamble recognized that various business groups within the corporation needed to simplify complex business processes and improve collaboration and communication among the teams working within and across functions in the company. These groups included Pharmaceutical Regulatory, Consumer Business Development, Competitive Intelligence, Research and Development, and Communities of Practice.

Business content owners in these groups used to document processes manually or with various ineffective software tools. The groups lacked a standard documentation format and stored files in various locations. This ad hoc approach resulted in a content management process that lacked cohesion within and across the business groups.

Procter & Gamble needed an easy-to-learn visual content management tool that teams and business groups could use to cooperatively develop processes, collaborate on strategies and projects, document projects consistently, and store all of the documents associated with a particular project in a central location that

anyone could access. In addition, Procter & Gamble wanted the tool to leverage software it had already incorporated into the corporate suite of software tools.

Such a tool was needed most in groups in which effective communication is integral to getting the job done cost-effectively and on time. For example, large amounts of money are at stake when the Pharmaceutical Regulatory group submits pharmaceutical drugs for clinical trials or approval by the U.S. Food and Drug Administration (FDA). Content owners in this group need a tool that facilitates communication and timely pharmaceutical submissions.

Solution

Microsoft® Office Visio® 2003 drawing and diagramming software was already a standard tool at Procter & Gamble and was widely used to communicate visually. Implementing the Visio add-on—Caper eBook, developed by GumshoeKI—to extend the powerful diagramming capabilities of Visio so Procter & Gamble could visually manage content on the Web was a cost-effective decision.

Various business groups at Procter & Gamble use Visio and Caper eBook to develop, organize, manage, share, and deliver content on the Web in a universally-recognizable electronic book layout. The layout includes a table of contents, chapters, and sections, just like a traditional book, and is easy to use and create. Subject matter experts (SMEs) follow a typical Visio workflow to create and publish content directly to the Web:

1. Within Visio 2003, SMEs generate an empty electronic book with chapters and sections just by clicking a button in the Caper eBook add-on.
2. SMEs develop, visualize, and simplify complex content, such as summary



maps, process flowcharts, timelines, and block diagrams in visual form, using Visio, as they normally would—all with one tool. Working with standardized Visio SmartShapes® symbols created by GumshoeKI specifically for Procter & Gamble, they create easy-to-understand diagrams format that is consistent across the organization.

3. SMEs use the Caper eBook functionality within Visio to populate the empty electronic book with Visio diagrams, insert supporting documents created with other Microsoft Office System programs into the electronic book, and then link all of the files in any manner they see fit.
4. Thanks to Visio support for the XML file format and Caper eBook functionality that enhances existing Visio Web publishing capabilities, SMEs publish the electronic book to the Web, again with a single click of a button. Team members throughout the company with the required access privileges can

then view the information in the book through a Web browser—there’s no need for special software. This single-click Web publishing also generates search functionality for the entire book, automatically develops a table of contents at the beginning of the book, and creates a What’s New section highlighting new content in the book.

GumshoeKI calls this hyperlinked content (organized in electronic book format) a VisualNet. The documents in a VisualNet connect the who, what, where, when, how, and why components of a complex Procter & Gamble business situation or problem.

A summary map created in Visio is used as the first, or home, page of an electronic book. This map provides an overview of the business situation for a particular group or project and a starting point for accessing all of the information and documents in the electronic book. Team members using the book can start at the summary map to get at-a-glance information about a project,

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Dilesh Patel

President
GumshoeKI

With the Caper eBook functionality built into Visio 2003, SMEs at Procter & Gamble can easily create an empty electronic book, and then populate it with as much project information as they like. Team members can navigate the book using a table of contents, chapter tabs, or hyperlinks within the book itself.

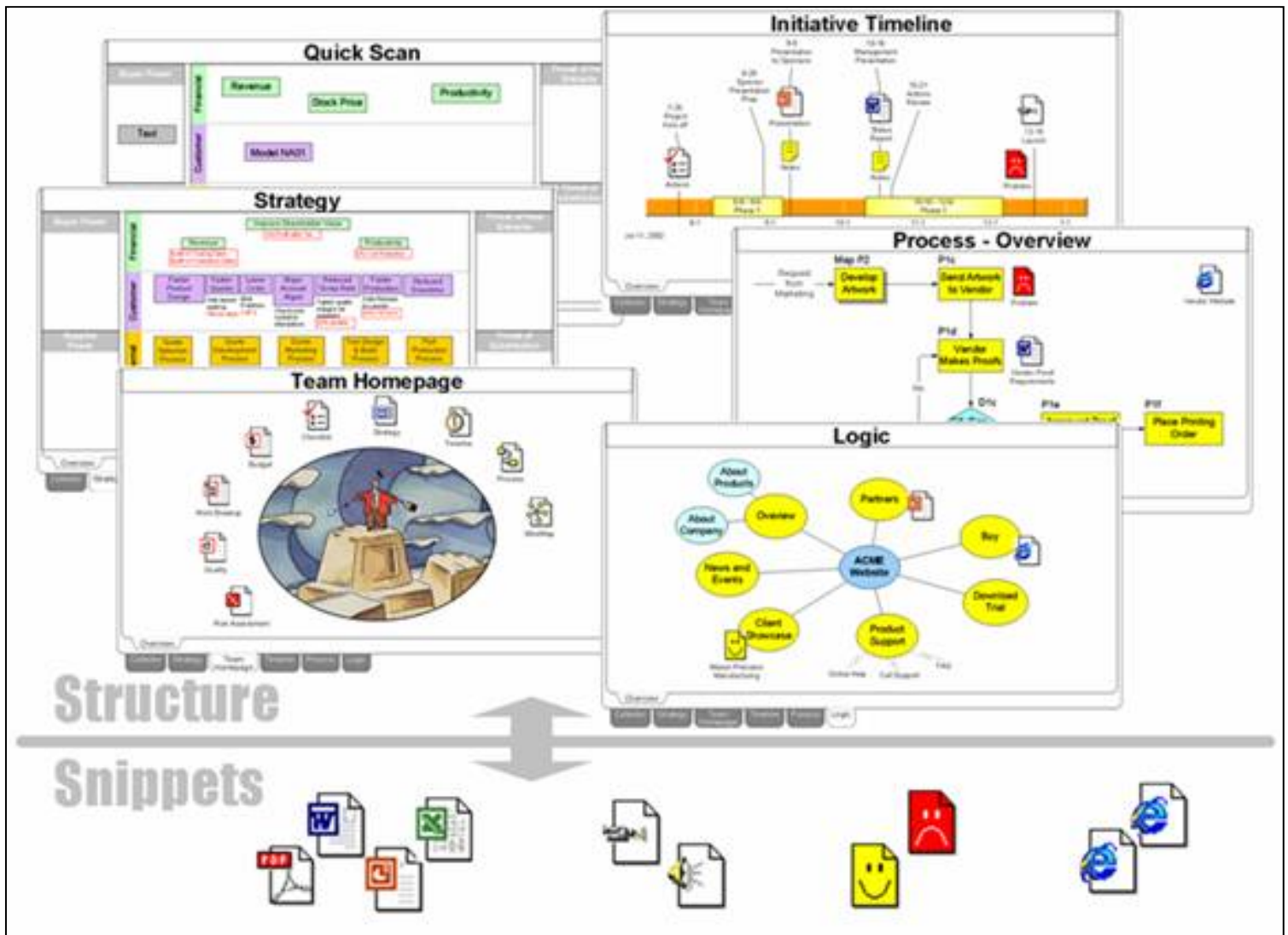


and then click various links to open documents or drill down into the book for more project detail. For example, team members can drill down to logic diagrams created in Visio, project metrics created in Microsoft Office Excel 2003, or project initiatives described in Microsoft Office Word 2003.

Team members can even determine the status of a document using visual cues that are universally understood, such as happy faces (which indicate everything is fine) and sad faces (which indicate there's a problem); these cues mean different things depending on the type of document they're associated with. For example, a sad face next to a timeline may mean a milestone hasn't been met or there are conflicting tasks in the schedule.

Team members at Procter & Gamble can also easily navigate an electronic book using the table of contents, find information immediately using the built-in search capabilities, and quickly identify what's new using the What's New button. The electronic books at Procter & Gamble even include feedback buttons that automatically start a team member's e-mail program to facilitate collaboration.

A VisualNet also offers flexibility. It can be delivered over the Web or printed on demand. This flexible format supports different work styles and enables employees at Procter & Gamble to use the VisualNet as a single source of information regardless of the final format. And the information is easy to find because it's located in one central location on the Web.



Even though Caper eBook is a Visio 2003 add-on and the core document used in a VisualNet is a diagram, SMEs can also link to documents created in other Microsoft Office System programs, audio files, or video clips that provide more information or insight into a particular business situation.



Procter & Gamble employees, such as content owners, documentation specialists, trainers, and process experts use Visio and Caper eBook to create VisualNets that meet a wide range of business applications, such as the following:

- **Document FDA compliance for pharmaceutical products** Content owners in the Pharmaceutical Regulatory group visually document how Procter & Gamble processes integrate and comply with FDA submission regulations. With electronic books, they easily disseminate the documentation over the company intranet.
- **Document and improve business processes** SMEs across business groups at Procter & Gamble use Visio SmartShapes symbols to document processes and the associated details in a standard format. With Caper eBook, they now share their content and collaborate globally over the Web with internal Procter & Gamble teams, partners, and suppliers.
- **Develop electronic learning materials** Content owners across business groups author and maintain visual electronic learning materials without needing direct IT support. For example, they author learning materials associated with critical business needs such as intellectual property management. When Procter & Gamble posts the learning materials to the Web, training-related travel costs dramatically decrease.
- **Create, manage, and share content** Business content owners in all groups create, manage, and share content across the entire global organization. For example, they publish training support materials and complex manuals on the Web.
- **Gather and disseminate competitive intelligence** With Visio and the Caper

eBook add-on, Procter & Gamble now has a method for presenting competitive intelligence data in a visual format that's easily and quickly shared across geographically dispersed teams.

- **Manage brand information** Brand management teams create portfolios of electronic books for each brand that include details on a specific aspect of the brand strategy, such as innovation, marketing, and consumer feedback. This Web-based format makes these portfolios easy for worldwide teams to access.

As Dilesh Patel, President of GumshoeKI says, "Once you give business people a simple way to harness the visual communication power of Visio, you just need to get out of their way. At Procter & Gamble, the range of applications for the Visio 2003 add-on—Caper eBook—has been amazing."

Benefits

Procter & Gamble realizes the following benefits by using Visio 2003 and the Caper eBook add-on.

Increases Productivity with Readily Accessible Information on the Web

Visio and the Caper eBook add-on make visual communication and the Web-based dissemination of project documents a reality for many employees at Procter & Gamble. Many of these employees wouldn't otherwise make the jump from creating individual Visio diagrams to illustrating complex business situations in a collection of linked diagrams, and then communicating them visually over the Web.

Each VisualNet that Procter & Gamble team members create with Caper eBook also provides a central location where all team members—no matter where they're located—can brainstorm, solve problems,

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explain concepts, and prioritize issues in real time. It's a place to think and work, not just document work. And, because this content-authoring functionality is so seamlessly integrated into Visio 2003, creating a VisualNet is not an extra task added to an already full workload. It's a simple extension of an already natural workflow.

As Kay Bross, Regulatory Information Architect at Procter & Gamble says, "The Caper eBook add-on takes the use of Visio 2003 to a new level of dynamic content management. It facilitates active team collaboration, publishes content in a universally recognized presentation format, and makes Web delivery easy. This broadens the Procter & Gamble audience to include worldwide team members. The first result we noticed after using Caper eBook was an increase in productivity due to easily accessible resources and better collaboration. And, depending on the content, the impact can save us a lot of money. For example, more accessible process maps and project details can lead to earlier drug submission dates And that's significant because at least a million dollars of lost revenue accrues for each day the approval of a drug is delayed." In the Pharmaceutical Regulatory group alone, team members share content 75 percent more effectively with their European counterparts just by making simple visual content accessible over the Web.

GumshoeKI also provides self-paced electronic learning materials for Caper eBook that help increase employee productivity with dramatic results. These materials are so effective that some Procter & Gamble employees can create their own

electronic book and deliver it on the Web after only two hours of training. Dilesh Patel adds, "We have seen people take Caper eBook training one day, and then publish a complete electronic book with visual, hyperlinked content on the Web a couple days later. These new skills enable Procter & Gamble employees to increase their contribution to their teams and organization in a tangible and visible manner."

Cost-Effectively Leverages Familiar Easy-to-Use Software Tools

Content owners at Procter & Gamble can leverage much of what they already know as Microsoft Office users when they create diagrams with Visio 2003, and then author content with Caper eBook. With this add-on, individuals and teams can cost-effectively and visually communicate and collaborate on a wide range of business topics that they might not have collaborated on before. In addition, standardization on Visio SmartShapes symbols results in less time spent diagramming and more time devoted to honing the business message and content.

The GumshoeKI developers also leveraged a familiar development environment when they built the Caper eBook add-on for Visio 2003. As Dilesh Patel puts it, "The XML capability in Visio 2003 is simple to work with in order to create powerful Web page elements, such as table of contents, search features, and What's New information. Visio is the easiest software to use for diagramming and development today."

Microsoft Office Visio 2003 is easy-to-use drawing and diagramming software that enables business and technical professionals to document, design, communicate, and improve ideas, processes, and systems. For more information about Microsoft Office Visio 2003, go to: <http://www.microsoft.com/office/visio/>.

Software and Services

Microsoft Office System:

- Microsoft Office Visio 2003
- Microsoft Office Word 2003
- Microsoft Office Excel 2003

Hardware

Standard enterprise workstations and Domino servers

Partners

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GumshoeKI develops software—based on Microsoft Office System programs—that help business people think and communicate visually in order to conquer pervasive problems related to clarity, alignment, training, and execution. For more information about GumshoeKI products and services, call (513) 378-9701, or visit the Web site at: <http://www.gumshoeKI.com/>. Procter and Gamble is an international consumer products corporation. For more information about Procter and Gamble products and services, visit the Web site at: <http://www.pg.com/>.

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