The Definitive Guide to Template Management

Your guide to understanding automation in document creation.
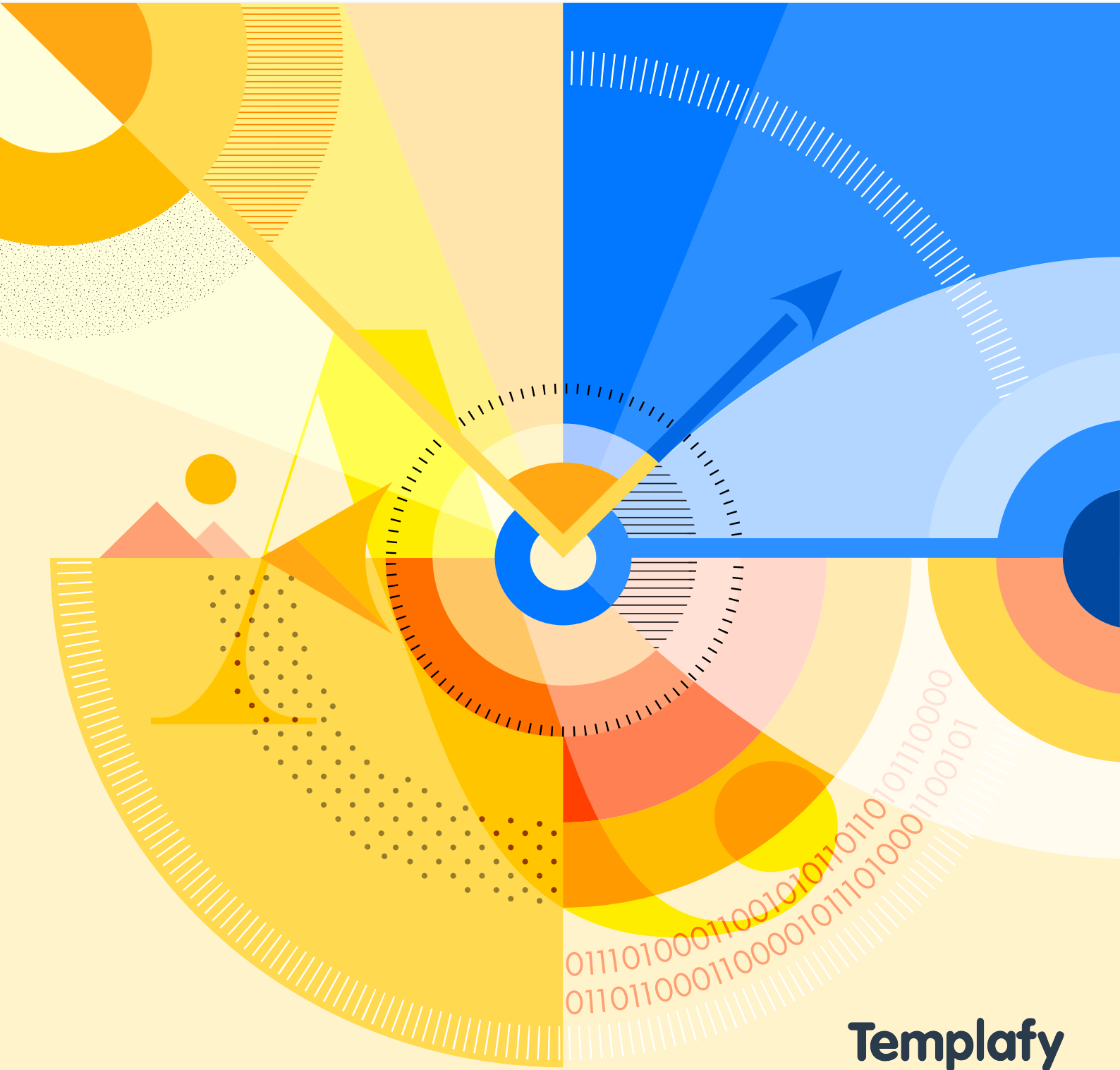
Templafy

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Preface.

What we talk about when we talk about

template management

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What we talk about when we talk about template management

Imagine a world where every company issued document, presentation and email had the right logo, up-to-date branding, and correct legal disclaimer.

That's what template management does.

Templates provide employees with a standardized path to consistency, productivity and professionalism in document creation. Whether it's a blank page with a company logo or a 100-page contract, templates are there every day in the lives of office employees. The reasons companies use templates have not changed, but the capabilities have evolved rapidly to redefine how we think about templates and what outcomes they can achieve.

This guide is useful for anyone seeking to learn about the technological advances in template management solutions. It will answer questions on how cloud technology has triggered the rapid evolution of template management and explain the breadth of new capabilities now available that support and enhance both the document outcome and employee productivity.

In this guide, learn about:

- **Why template management is becoming a hot topic**

- **The importance of integrations with ECM systems**

- **What features to look for in a template management solution**

- **How to make a case internally for buying template management**

- **What the future of template management looks like**

We hope this guide provides you all the information needed to get informed about template management.

Chapter 01.

What is template management?

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One-page overview of what this chapter covers

An introduction to template management, giving context to the surprising evolution that has happened since cloud technology transformed enterprise operational landscapes.

A template is a replicable way to create a standard document, and every company bases their communications on a range of document templates. From letterheads to master slide decks, from reports to email; these document types are the lifeblood of a company's internal and external communications.

Company templates are produced in a secure, governed environment; these templates are correct or "authentic" by default. Given that the legitimacy of a company is found in its visual and legal identity, it is vital that documents produced in a company are "authentic" in order to uphold that legitimacy. The purpose of template management, therefore, is to help users create correct or "authentic" documents.

Here's a broad overview of template management and why it's seeing significant growth.

Learn about template management

Template management is a system of governing a company's document ecosystem based on a range. of document templates.

Find out how template management works

Template management technology supports the storage and availability of company content involved in the production of documents.

Learn about SaaS template management

A new generation of template management software developed by vendors utilizing cloud connectivity capabilities.

Find out why companies use template management

For efficiency and non-friction in document creation workflows, and for authenticity in all company-facing documentation.

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Template management:
What it is

"Template management" is a broad term referring to a system that controls company document ecosystems based on company templates.

Template management is a solution that controls a company's document ecosystem and document lifecycle based on a range of templates. That is a very broad statement for a function that has long since evolved past a static document with some pre-populated company information.

To capture what template management solutions and templates are capable of today, it may be more useful to think of templates as a means to an end and discuss what template management solutions can achieve.

Definition

What is an authentic document?

An authentic document is one that is compliant and correct in every aspect for the person creating it. The authenticity refers to the correctness and compliance of the company identity (logo, font, disclaimer etc.) and to the identity of the person creating the document (name, location, etc.)

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SaaS template management

Providers of SaaS template management are tapping into the incredible power of connectivity in the cloud to enhance the capabilities in ECM systems.

Often falling into the Enterprise Content Management (ECM) category, template management is a system of controlling a company's document ecosystem based on a range of document templates. In recent years, template management has become a central aspect of the digital workplace where documents, presentations, spreadsheets, and emails are the tangible output.

The rise of SaaS adoption in enterprises

There is growing acceptance that SaaS solutions allow businesses to operate at the forefront of software development as they move away from the slow, cumbersome on-premise software updates to the more agile cloud system. "…moving from on-premise infrastructure benefits not only the company's wallet, but also create a considerable increase in efficiency, productivity and accessibility of business operations." (Forbes, Five Reasons Why Switching to SaaS Will Be The Best Investment You Make This Year, 2017)

According to Forrester research, 31% of organizations surveyed in 2018 put high or critical priority on increasing the use of SaaS over the next twelve months, and an additional 53% put it at moderate priority. (Forrester, Create a Modern Software Strategy With AI-Driven Platforms And Their Ecosystems, March 2019)

SaaS template management technology supports the storage and availability of ECM content that employees use to create company documents. And this is why the cloud is crucial to the enablement of efficient document production.

31%

of organizations put critical priority on increasing SaaS usage

Source: Forrester, Create a Modern Software Strategy With AI-Driven Platforms And Their Ecosystems, March 2019

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Template management:
What it does

A template management solution can help produce a document that is authentic. "Authentic" meaning compliant and correct in every sense for the person creating that specific communication.

Companies need template management solutions because a document that is authentically from an employee of a company, at a particular address, in a particular language, containing particular content that is authentic to what the employee wishes to communicate is necessary for the company's identity to be legitimized.

To achieve an output that contains all the correct content to create a compliant and correct document requires a solution that ensures the document creator has all the help and guidance needed to insert the content that makes such an output authentic. This includes logo, data, disclaimer, translations, etc. A template management solution should empower people to create outputs that are authentic to the context they are working in, efficiently and easily.

The quality of a document is determined by the system that outputs it. A template management system is designed to prevent non-authentic documents being produced.

What is a non-authentic document? It's one without a logo or with the wrong font – making it not authentically part of that company, or it is one that doesn't let its communication come through because of poor design or modeling.
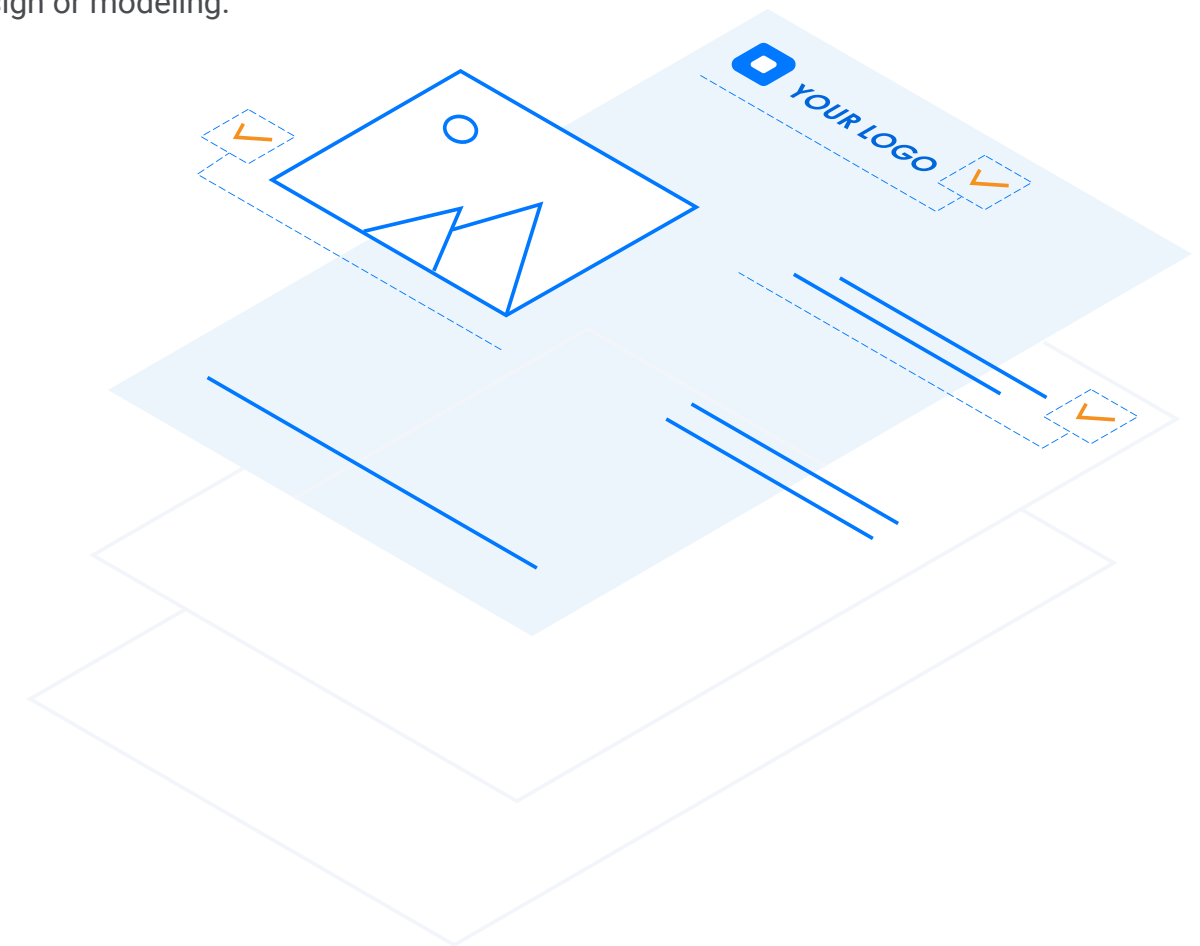
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Types of template management: Static

Customized templates save a lot of manual input, but an emptier, generic template has more reach across the organization. What's best: asking some staff to maintain many templates, or asking all employees to manually insert personal and department-specific info every time?

Until recently, enterprises could only provide the bare minimum of information in a template, if it was to be used by many people. To include more information meant the specificities of the template related to a smaller number of employees. These templates are, of course, static documents where the individual employee manually inputs their personal details, office location, messaging, data, etc.

Static templates have a base-level of pre-populated information requiring manual input of employee information. Changes to the static template require admins and IT department to manually update and distribute.

The more pre-populated a template is, the more useful it is to the company (for consistency reasons) and the employee (for productivity reasons). That being the case, the obvious thing to do was to create more templates with more customization. But as template numbers grow, so do the resources needed to keep track, maintain, update and distribute them. Having more templates creates more consistency and productivity, but it also creates a lot of extra work for the departments required to manage them.

Not controlled

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Types of template management: Dynamic

Dynamic templates are smart templates. Auto-fill features that are linked to individual user data are what makes "dynamic templates" dynamic.

Template management systems grew with technology – most particularly due to SaaS technology adoption in enterprises. Today, the most advanced template management systems have templates that are dynamic (i.e., not static.) Dynamic templates are "smart" in that they eliminate repetitive tasks by being able to auto-populate templates based on user-data and integrations with existing technology and apps. A centralizing-hub model creates a network effect, resulting in the end user being freed from repetitive tasks and the administrators being no longer required to monitor individual outputs – they just need to keep an eye on the master template.

Additionally, these smart or dynamic templates are **easy to update and distribute**, thanks to the enterprise shift to cloud-based IT infrastructures.

Going back to the purpose of templates, i.e., consistency, compliance, brand-adherence, efficiency; the broader landscape of digital efficiency means that the menial tasks have largely been cut out of the modern workflow.

Employee information

Office location

Document context
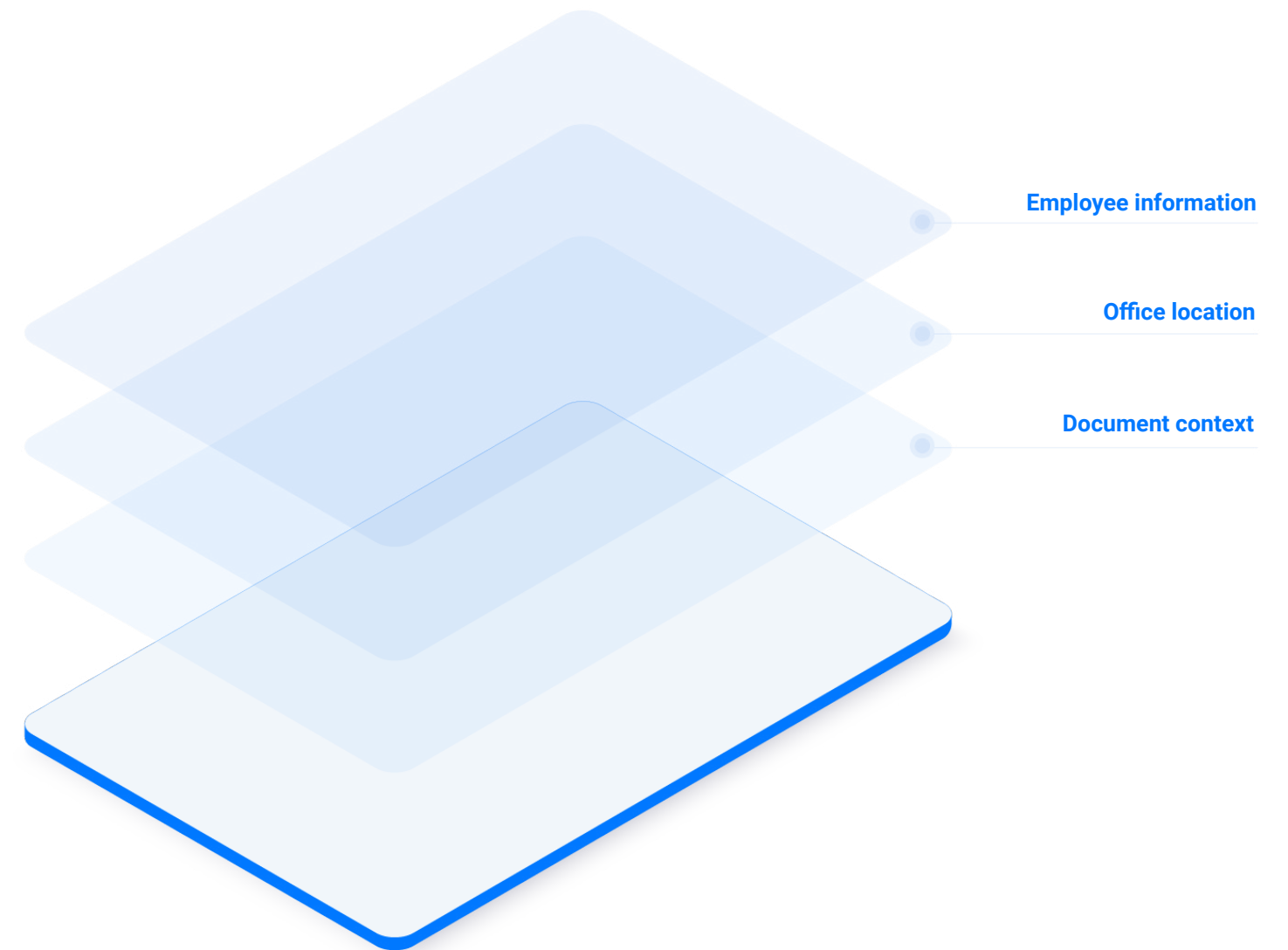
How does template management fit into
Enterprise Content Management (ECM)?

Template management, like ECM, works with the managing and delivering of content to users.

Template management is often categorized within the area of Enterprise Content Management (ECM). It fits in because, similarly, template management involves managing and bringing content to users. ECM works with governed material and defined output, for example, a content management system (CMS) delivering enterprise governed content to a website typically comes within the scope of ECM.

Governing all employee outputs using the power of the cloud.

Thanks to cloud technology, bringing the correct content to the fingertips of employees is now possible. Template management has now reached a stage where governance can reach individual employee outputs. Until recently, governing the individual outputs of tens of thousands of employees was regarded as impossible. And now that it has become technically possible to bring the correct, authentic content to the fingertips of those who create documents; enterprises have been granted the ability to govern the daily output of emails, presentations, documents, letters, etc.

Definition

Enterprise Content Management

Enterprise Content Management (ECM) is a set of defined processes, strategies and tools that allow a business to effectively obtain, organize, store and deliver critical information to its employees, business stakeholders and customers. To differentiate themselves from competitors, some ECM vendors are beginning to market their products as content management services or content management platforms.

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Businesses can do much more with less

When an optimized template management software is in place; the effect is felt enterprise-wide.

What are the effects of implementing a modern SaaS template management system?

1. Smart software setup.
IT systems with the information required to populate a document are now speaking to each other through integrations.

2. Easier access to assets.
When employees can create a document without interruption to their workflow, it eradicates the draining feeling of time-wasted on minutiae that are not job-related, e.g. finding things easily, when all the touchpoints needed to assemble a document are centralized and made accessible within a familiar workflow.

3. Positive employee experience.
Positive impact on the workflow, including psychologically. A 'psychological flow' is created from smooth workflows, reducing stress by eliminating tedium.

Corporate documents

Annual reports

Spreadsheets

Sales presentations

Email signatures

Letterheads

Disclaimer text

Invoice

Reports

IT integrations

Resource management

Data collection

Content analytics

Document automation

Dynamic content

User access

Distribution

Aa

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Key metrics on actual use of template management

Companies can now govern workflows and content performance using data from template management. Being able to understand contexts where templates and content are used, means new data insights are now possible.
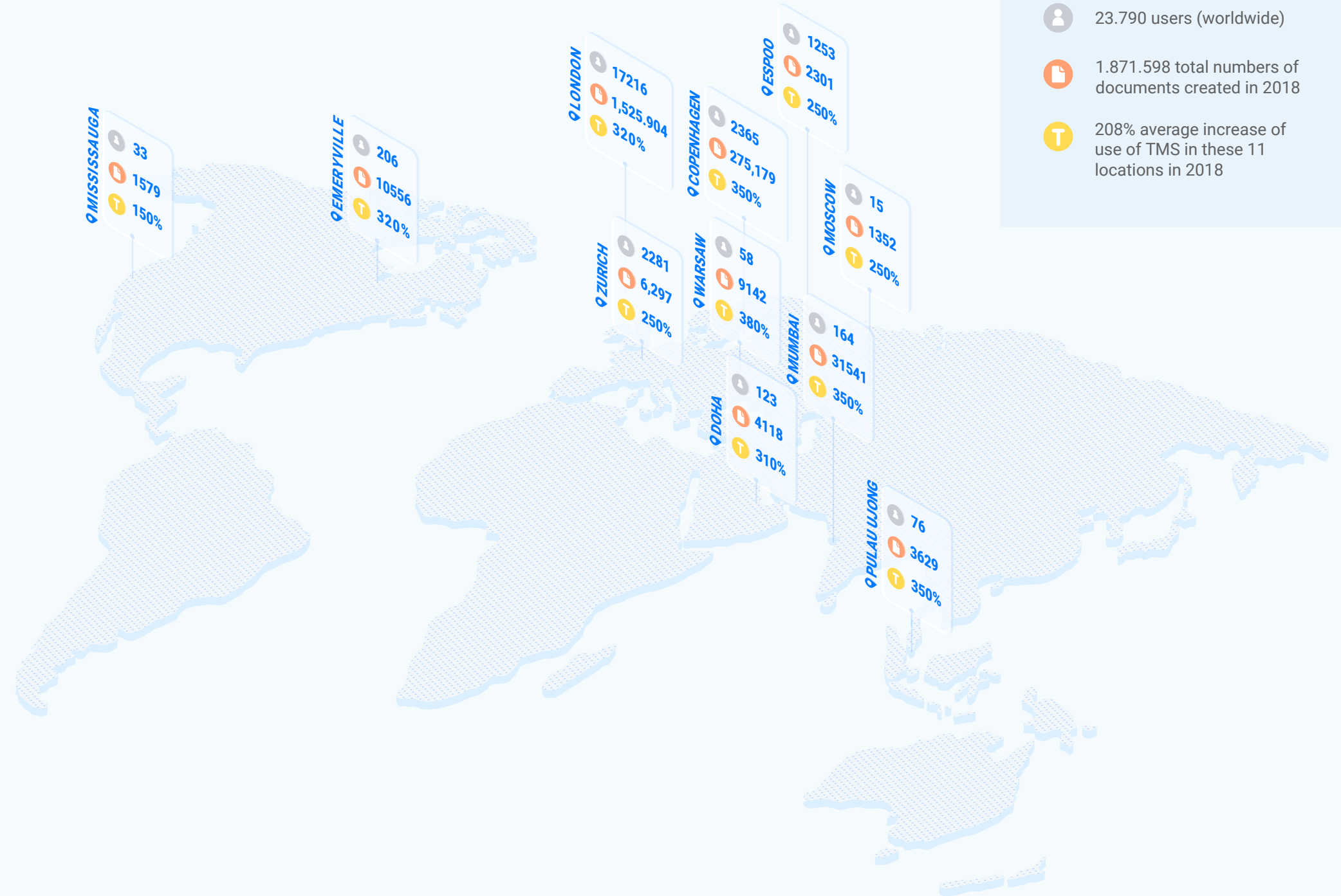
11 locations (worldwide)

23.790 users (worldwide)

1.871.598 total numbers of documents created in 2018

208% average increase of use of TMS in these 11 locations in 2018

MISSISSAUGA
- 33
- 1579
- 150%

EMERYVILLE
- 206
- 10556
- 320%

LONDON
- 17216
- 1,525.904
- 320%

COPENHAGEN
- 2365
- 275,179
- 350%

ESPOO
- 1253
- 2301
- 250%

MOSCOW
- 15
- 1352
- 250%

ZURICH
- 2281
- 6,297
- 250%

WARSAW
- 58
- 9142
- 380%

MUMBAI
- 164
- 31541
- 350%

DOHA
- 123
- 4118
- 310%

PULAU UJONG
- 76
- 3629
- 350%

Source: Templafy live composite data from professional service organization over 12 months (2018)

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Key metrics: using data from SaaS template management

Companies can govern new areas with data from template management. By understanding which templates and content are used where; employee workflows and content relevance can be understood better than ever before.

Template management can **collect data** which can be analyzed and tracked. Data such as who is using what content and templates, from which location, and how many documents are being created.

Template management system data demonstrate the **ROI on productivity**, with statistics showing users spending up to four few hours per week reviewing content.

Administrators benefit from being able to **measure content usage.** They can see which content is proving successful and can make an informed decision on which content to maintain.

Additionally, branding teams benefit from the governance capabilities, which lets them see that employees are using the company templates. This saves time previously spent checking for up-to-date branding content. Through template management systems, branding teams automatically and centrally push template updates to all users, globally, therefore safeguarding the company brand.

The capabilities inherent in template management systems help ensure that employees are provided with the correct, authentic content and templates, reducing manual checks and centralizing distribution.

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A case for
template management

A case study of how problems with compliance and branding standards was alleviated by the introduction of a template management solution.

Company
If P&C Insurance

Business area
If Industrial

Number of employees
6,500

SITUATION REQUIRING SOLUTION

Creating authentic documents without access to a central repository of document templates, declaimers, and brand assets

If Industrial's employees would make their own document templates with images found on the internet and save them on their individual computers. This decentralization made it difficult to know which templates were up-to-date with compliance and branding standards.

Document branding was a tedious process. Some documents, such as insurance terms and conditions, had to be sent to external production agencies which would "brand" the documents. Afterward, documents were sent back to the employees in PDF format, meaning any update to the document would trigger the entire process again.

Anna Andersson-Solja
Marketing Project Manager

"

Every country, and even units within the same country, had their own preference for how documents should look, which didn't necessarily follow the company's visual identity and guidelines.

"

A case for
template management

Solving the problem with a template management solution.

If Industrial adopted a cloud-based template and digital asset management system to provide a central place for the employees to find up-to-date document and presentation templates.

OBJECTIVES

Access
Employees have one common storage place for all templates and content which everyone can access.

Compile
Creating documents takes less time, and templates and content are correct.

Distribute
The central storage place in the cloud means updates to all content.

RESULT

The marketing department could provide employees with access to common templates for several types of documents, which can be adapted to country or employee-specific needs. Insurance terms and conditions documents, which were previously outsourced to external agencies to ensure accurate, 'authentic' branding, are now created internally.

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Is your **company ready** for a template management solution?

This worksheet can help determine if your company is ready to implement a template management solution.

For each factor to consider, choose a number ranging from 1 (strongly disagree) to five (strongly agree). The numbers in between 1 and 5 directly correspond to your level of agreement, neutrality or disagreement with the statement in question.

To calculate your results, add up the numbers you scored for all questions:

If you scored > 45
You are a prime candidate to benefit from a template management solution.

If you scored between 25-45
Your company may be ready to implement a template management solution or some elements of a solution for targeted approach to productivity or governance.

If you scored <25
You may not be ready to implement a full template management solution. However, there are still elements of a solution that could bring significant benefits to your company.

Whether you scored high or low on this quick readiness assessment table, you should now have an idea of where your company is regarding managing its document ecosystem.

FACTORS TO CONSIDER	DISAGREE				AGREE
	1	2	3	4	5
Getting access to templates or document assets requires multiple steps	●	●	●	●	●
Employees are not always using the correct content	●	●	●	●	●
It is necessary to involve IT for distribution of templates and document assets	●	●	●	●	●
There is no centralized control over company templates and document assets	●	●	●	●	●
The maintenance of company document templates and assets is a complex task	●	●	●	●	●
Individual employees do not have control over their document ecosystem	●	●	●	●	●
Employees spend a lot of time creating documents/presentations	●	●	●	●	●
Routine tasks are not automated	●	●	●	●	●
The company is involved in a merger/ acquisition	●	●	●	●	●
The company has recently/is planning to rebrand	●	●	●	●	●
The company is updating/replacing an older IT system or migrating to the cloud	●	●	●	●	●
The company is moving to the cloud	●	●	●	●	●

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Key **takeaways**

Get a quick overview of the most important points as discussed in this chapter.

1 What's new with template management?

Modern template management is a new generation of technology that can connect all document touchpoints in enterprise document ecosystems and deliver exactly what's needed to the employee in the exact moment and place they need it.

2 SaaS template management is the future

SaaS template management technology has developed to take advantage of cloud connectivity capabilities. It has advanced enterprise governance of company communications and access has improved employee productivity.

3 Benefits of modern template management

Template management enables employees to work faster and more accurately, creating company output that lives up to company standards. It empowers administrators by putting template control in the hands of the relevant experts, frees up IT resources, and provides a more efficient route to compliance.

Chapter 02.

Why is template management so hot right now

One-page overview of what this chapter covers

Enterprises are learning that there are parts of the communication outputs that can now be governed – parts which were never previously considered possible.

This chapter will look at how the rapid growth of template management is setting new standards in employee **productivity**, document **compliance** – both legal and branding – and playing a role in improved **Employee Experience (EX)**. At the core of this growth is the development of technology that enables enterprises to **govern the daily outputs** of employees. Whereas previously, the only possible-to-govern company output fell under Enterprise Content Management systems, template management has since evolved to provide a solution that can effectively govern the documents created by employees daily.

Learn about cloud enabled template management

Template management in the SaaS sphere has seen vendors develop easy-to-deliver solutions that empower employees. Find out more.

Learn about document governance & compliance

The challenge of ensuring governance over the content inserted in company documents has been solved. Learn how.

Get informed about employee productivity

Find out why employee productivity is one of the core reasons that template management is growing as a category.

Learn about Employee Experience

Find out how research into EX has demonstrated the benefits of improving the daily workflow of employees.

SaaS appeal: How cloud enables better template management

Enterprises worldwide are adopting Software as a Service is because it fuels the speed and agility necessary to be a competitive business in the digital era.

When speed and agility are the deciding factors for companies looking to stay competitive, the answer is cloud. The great digital transformation of late has seen the exponential rise of Software as a Service (SaaS), with **61 % of respondents** in a Forrester survey, investing, planning to invest, or already having invested in it. (Forrester, Drive Greater Speed, Innovation, And adoption With SaaS Transformation, February 2019). One of the biggest shifts that has come about with SaaS is the empowerment it gives to everyone in the organization. It has opened up greater **business agility** through real-time information and collaboration opportunities. From managers to line workers, controlling their own environment has become possible with the move away from older on-premise systems.

61%

of organizations are investing, planning to, or have invested in SaaS

Source: Forrester, Drive Greater Speed, Innovation, And Adoption With SaaS Transformation, February 2019

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Business goals enabled by
Software as a Service (SaaS)

SaaS has become commonplace in the enterprise landscape with many SaaS companies becoming household names. This is thanks to the possibilities SaaS enables for faster, better business outcomes.

Many SaaS companies have become household names by now, driving productivity and transforming workflows drastically from how offices operated just a decade ago. Companies like Slack, Box, Salesforce, Oracle and Zendesk – to name just a few of Enterprise Management 360's top 10 SaaS companies, are the powerhouses behind changing the way enterprises manage their business, communicate, and much more.

"Companies that offer the best software as a service are not only helping themselves, but pushing the rest of the industry forward."

Source: EM360tech.com

Business goals SaaS enables:

- ✓ Reduce the burden on IT
- ✓ Mobile access - anywhere
- ✓ Real-time collaboration
- ✓ Real-time global distribution
- ✓ Yields more and better data
- ✓ Foundation for advanced analytics and reporting
- ✓ Connecting technologies
- ✓ Fluid solution "one size fits all"
- ✓ Automation
- ✓ Drives business agility
- ✓ Empowers business users to work independently
- ✓ Centralized "live" repository for company assets
- ✓ Non-disruptive, automatic software updates

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Collaboration is the big advantage of cloud

SaaS has enabled companies to launch their applications as web-portals, changing the way users interact with the apps, since they now work on devices other than on-premise computers (i.e. mobile phone, tablets, laptops).

Working with documents in the cloud gives enterprises the advantage of real-time collaboration with a bank of ready-to-access templates and assets in a central repository. With this kind of ability, **fast changes**, quick handovers, **tracking** changes in live documents, **access** to user data for automatic personalization, and **real-time distribution** with no geographical constraint, gives a clear competitive edge over the older slower, versioning and email distribution of documents, and IT resource-heavy manual distribution and updates of templates stored in on-premise systems.

The move to Microsoft Office365, has been widely adopted by enterprises worldwide for the advantages inherent to working with Office Suite documents in the cloud. An analysis of over 135,000 organizations globally measuring the enterprise use of major cloud platforms was carried out by Bitglass in 2018. It revealed that 81% of organizations were using cloud services, and that Office 365 usage among organizations globally reached over 56% in 2018, up from 34% in 2016.

"As companies grow, they are more likely to adopt a breadth of cloud applications in order to increase productivity and collaboration across all of their departments."

Source: Bitglass, Cloud Adoption 2018 report

Microsoft Office 365 usage increase

56%

34%

2016
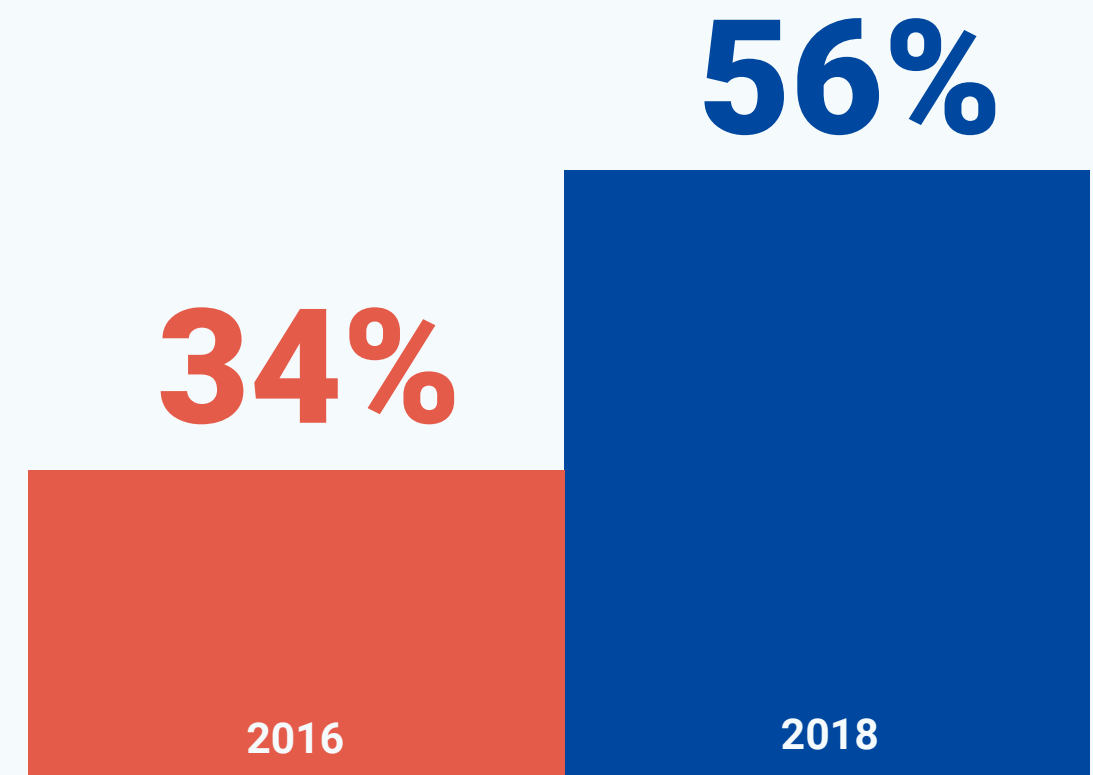
2018

Source: Bitglass, Cloud Adoption 2018 report

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Understanding governance and compliance
through SaaS template management

How governance happens

A SaaS template management platform has the power to connect **governed company content** through integrations with ECM systems (DAM, DMS, CRM etc.) This automatically directs the correct company content to the employees through smart templates.

How compliance works

Smart templates help the employee create **authentic, compliant documents** by auto-inserting company-approved information. A user-friendly workflow, cuts out the manual steps of inputting company-approved content, embedding trust in the creation process from employee and company perspectives.
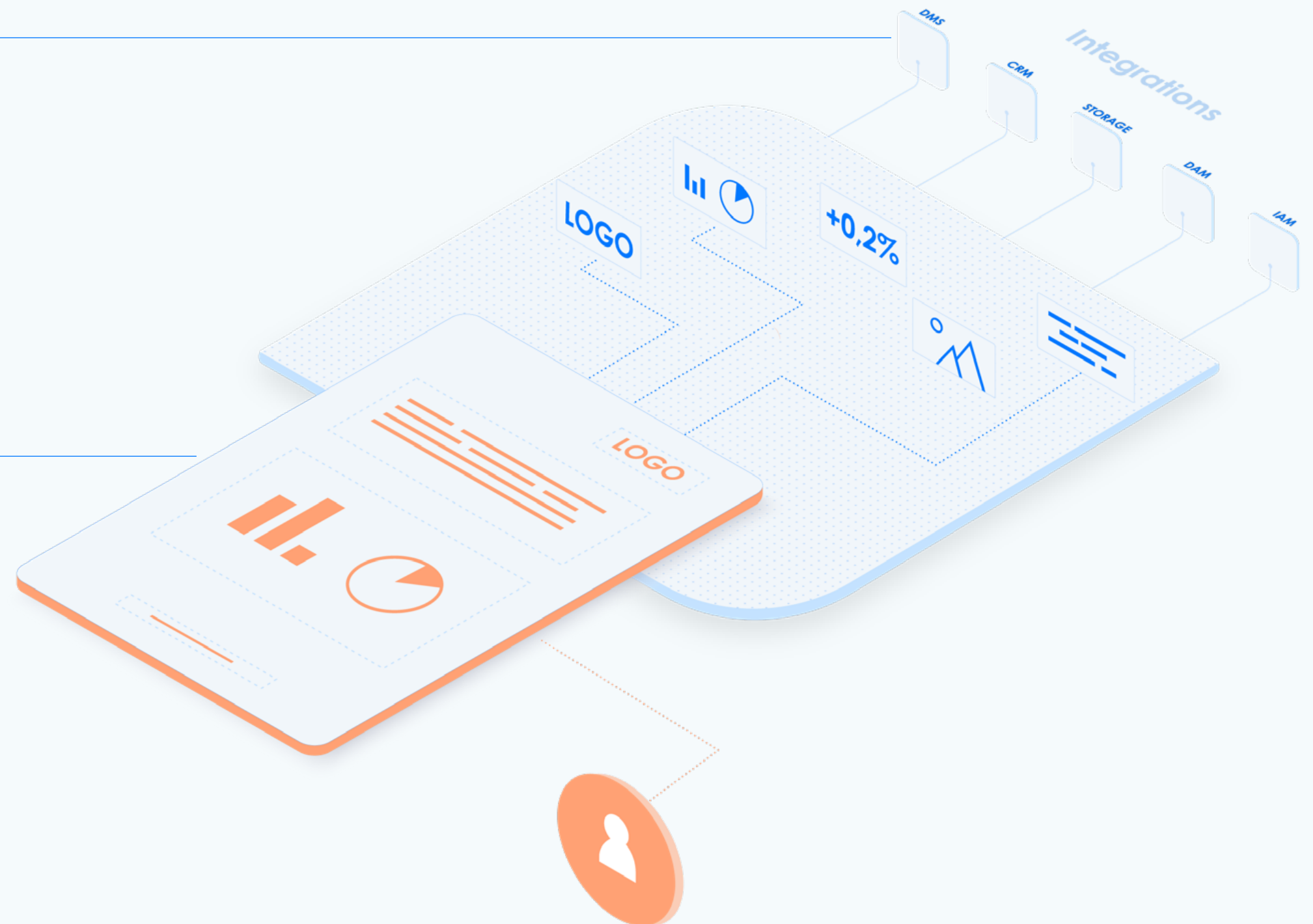
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Brand **compliance** and enterprise **governance**

Protecting brand investment is a central part of what a template management solution can do for companies.

The role of templates in protecting brand and governing employee output

The purpose of template management solutions, as discussed previously, is primarily to render company documents **authentic**. The value of a company's branding is now, more than ever, more measurable and protecting this value is high priority for many enterprises.

Templates play a significant role in ensuring the protection of brand for any documents, emails, or public facing asset produced by employees and shared with customers and potential customers.

The ability to **govern the brand** through template management, therefore, is a key benefit in **maintaining the value** invested in a company's brand.

Enterprise governance on a scale never before imagined

SaaS enabled template management platforms have connectivity capabilities that allow for integration into a company's document ecosystem. This creates an IT infrastructure where the latest, governed, on-brand content can be **distributed instantly** to employees thanks to cloud operations which happen in real-time.

By giving control over maintenance and distribution of company templates and assets to the in-house experts, for example brand managers or the legal department, means **the right people** – not the IT people – are **governing** the company content (brand assets, approved images, up-to-date legal disclaimers and so on). The result: employees creating daily outputs are working within a secure, **trusted** environment.

Forbes

"

Brand value creation means creating a brand promise of a valued, relevant, differentiated, trustworthy experience that is delivered consistently. Creating and delivering a trustworthy branded value proposition is the source of sustainable value creation.

"

Source: Forbes

SaaS enables better Employee Experience translating to better business performance

Studies have repeatedly shown that employee productivity increases when companies improve Employee Experience (EX).

Productivity for individuals means competitive advantages for enterprises

"Almost all companies (95%) use the Office package on a daily basis, and 44% use Office for more than 5 hours a day."

Source: Epinion Report

With such a high percentage of employee hours being allocated to working in documents, the impact that a better template management setup can potentially have on a company becomes clear.

Improved Employee Experience delivers increases in productivity

A study conducted over several years with 300,000 data points concerning the virtues of satisfied employees showed that an increase in employee turnover from 12% to 22% resulted in a 40% reduction in workforce productivity and a 26% dip in financial performance. (Park & Shaw, Journal of Applied Psychology, 2013, Vol.98, No.2)

While a related study demonstrated that companies with happier employees had half the employee turnover and an 81% higher customer satisfaction rate. (Forrester, Transform the Employee Experience to Drive Business Performance, February 2018)

Definition

What is Employee Experience?

McKinsey defines **Employee Experience (EX)** as "... companies and their people working together to create personalized, authentic experiences that ignite passion and tap into purpose to strengthen individual, team, and company performance."

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Focusing on **happiness** promotes productivity

If employee happiness is so crucial to a company's performance, the next question is: what makes employees happy?

A growing body of psychological research shows that the **daily work experiences** of employees are the most **critical predictor** of their work-engagement.

Scientist Mihaly Csìkszentmihàlyi studied states of mind and explained that the optimal state of mind, when creativity is peaking, is what he calls 'Flow'. Linking happiness and flow then, results explained in a Scientific American article suggests that "happiness makes people more receptive to information of all kind, and therefore results in greater creative thought processes." (Forbes, The Social Responsibility to Generate Employee Happiness)

McKinsey asked more than 5,000 executives about **peak performance** and what it takes to reach the feeling of 'flow' as described by Csìkszentmihàlyi. The answers were broken down into three categories, one of them "includes elements such as role clarity, a clear understanding of objectives, and access to the knowledge and resources needed to get the job done."

Relating this back to SaaS template management, it's clear from the amount of time spent by employees creating documents, that driving **good EX in document creation** can have a significant impact on company productivity.

Good template management solutions should impart the ability to make progress flow in the everyday tasks of knowledge workers. That objective is achieved by introducing a solution that **connects** the employee to the **resources** they need to get their work complete.

Secondly, by ensuring that the resources they access are properly governed i.e. accurate or up-to-date gives the employee **peace of mind**. Helping secure and ensure ease in a knowledge worker's workflow, therefore, is a step towards reaching employee happiness and tapping into the **win-win situation** for the individual and company.

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Key **takeaways**

Get a quick overview of the most important points as discussed in this chapter.

1 SaaS powered template management is revolutionizing governance

SaaS template management has opened up new technological possibilities to govern the daily output of employees. The result: a win for the company in terms of productivity and compliance, and a win for the employees with a faster workflow they can trust.

2 Cloud-enabled collaboration has changed how people work

Enterprises are reaping the benefits of cloud-enabled collaboration. Templates are centralized and ready-to-access. There's the ability to make fast changes, quick handovers, live tracking, access to user data for automatic personalization, and real-time distribution.

3 Employee happiness is a hot topic for good reason

Driving good EX within companies has a direct impact on employee happiness and productivity. Creating a positive workflow with embedded trust benefits both employee and company.
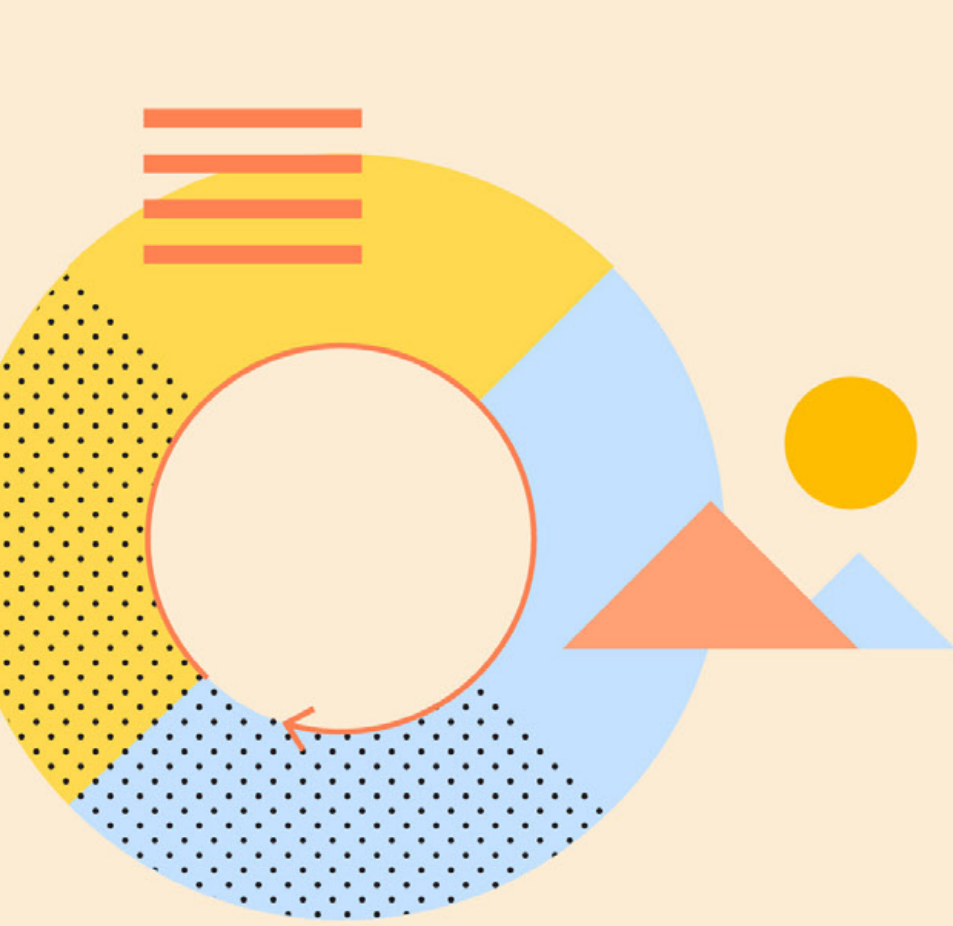
Chapter 03.

Common features in template management

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One-page overview of what this chapter covers

Read this chapter to understand the range of template management features available through different vendors and how to map them into the document lifecycle.

This chapter looks at the different features of template management systems, and maps them within the document lifecycle context.

The easiest way to see what template management can do is to look at what it affects within the lifecycle of every document. Vendors offer broader and narrower tools, which affect individual or all-encompassing parts of the document lifecycle.

The document lifecycle starts with **access** to a central repository that connects managed, up-to-date company templates and content with employees. This is core to a template management solution.

The next lifecycle stage is the use of an **automated compilation** feature that takes the hassle out of repetitive tasks for employees and ensures format, standards and compliance for the company.

Third, **customization** involves the manual input of information into the document from the employee, where there is access to approved digital assets and efficiency tools which aid a smooth workflow and optimal result.

Finally, a feature for **repurposing** older documents that validates the content being reused in the creation of a new communication.

Learn about access to templates & assets

Everything an employee needs to create a document in one centralized location.

Find out how automation features work

Automated features to eliminate repetitive tasks and ensure authenticity.

Learn about customization features for documents

Manual ability to insert authentic company content and digital assets into a document.

Learn about validation features for repurposing

Safe reuse of existing, older documents for a new purpose.

Understanding
business needs

Before choosing a vendor for template management, it's crucial to understand the business needs, both now and in the future.

Some vendors offer far-reaching solutions that can cover all parts of the document lifecycle, from distribution and end-user access of templates and digital assets, to productivity tools, validation, governance and re-use.

Most vendors offer tools that focus on one or two of the areas within the lifecycle. Depending on a business' needs, selecting a focused template management solution or a broader one rests largely on a business' **current and predicted requirements**. For example, a small company of less than 50 employees is unlikely to have the same requirements for global distribution of templates and assets as an enterprise with 50 offices around the world.

When selecting a vendor, therefore, it's important to **understand** the business needs now, and in years to come.

See for a detailed look at choosing the right vendor.

Definition

What is the document lifecycle?

The document lifecycle refers to every touch-point a document has from the moment a template is accessed, to the day it is re-used for another purpose. A document includes presentations, emails, reports, sales quotes.

The document lifecycle
by stages

The entire lifecycle of documents is broken into four stages: from the moment of opening Word, PowerPoint, Google Docs etc., to the reuse of that same document for another purpose later.

STAGE 1: Access
Having access to company-distributed documents and digital assets is the starting point of any document, where the business can manage the digital asset or template, and the user can access it as needed.

STAGE 2: Automated compilation
An automatic function inserts the company-approved digital elements into the template (images, graphs, text etc.). This creates an authentic document by using the correct digital assets and information in a company-secured and user-trusted environment.

STAGE 3: Customization
An auto-compiling feature provides a partially complete document, that then needs manual input. This step requires connectivity between the document creator and the document template, and the digital assets and information necessary to complete the task in one uninterrupted workflow.

STAGE 4: Repurposing
Re-opening a previously saved document to repurpose, update, or re-use requires validation tools to verify that the information is up-to-date. Auto updating abilities allow the user to continue work, or to use the document as a starting point for a new purpose or recipient in a trusted, secure environment.

STAGE 1
Access

STAGE 4
Repurposing

STAGE 2
Automated compilation

STAGE 3
Customization

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Template management features
within the document lifecycle

Understanding the area(s) where most help is needed is the first step to selecting the best vendor to address a company's needs.

Central repository - access

A centralized library should be at the core of a template management solution. It is the place where all templates and digital assets can be easily accessed by employees and maintained by company administrators. This ensures quick and consistent access to a trusted environment where all company document assets are maintained.
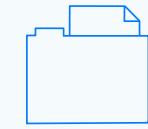
Dynamic templates – automated compilation

Automated compiling features are designed to eliminate repetitive tasks while ensuring accuracy. By automatically inserting company content in company-controlled document templates available centrally, the employee workflow is made smoother and consistency in document production is ensured.

Productivity assistance tools – customization

Features are available to assist employees building documents, so this can be faster and more accurate. Examples include consistency checkers, help with layout and formatting tools. Integrations to existing DAM, DMS, and CRM systems will connect brand and customer information sources to the employee creating the document.

Validation capabilities – repurposing

Features are designed to safeguard the re-use of older documents that are repurposed as templates for a new document. Validation features should offer security to the company and the employee by connecting the reopened template to the template management system where the up-to-date company content resides and can be checked against.

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Go evergreen
or go obsolete

An evergreen template management solution is a solution that is always up-to-date.

Microsoft defines evergreen as *"Evergreen IT refers to running services comprised of components that are always up to date."*

Having an evergreen document template management system comes with obvious advantages. With **automated software updates**, there is no more versioning to deal with; there is one version of the software and continuous deployment by the software vendor keeps it always up to date with the latest technology.

This type of system **avoids the disruption** caused by versioning which is IT resource heavy and can be disruptive to employees.

As the numbers of enterprises migrating at least some of their IT infrastructure to the cloud grows, those who choose not to migrate risk being left behind in many ways. Most importantly, perhaps, in terms of lost revenue.

SaaS template management solutions have the capabilities to bridge many of the limitations of on-premise solutions such as **scalability, performance** and **security** while maintaining the existing configuration and local requirements. As templates and document creation are central tasks for vast numbers of knowledge workers, keeping that workflow **interruption free** and always **up-to-date** relates directly to business outcomes.

Microsoft

"

Evergreen IT encompasses not only the services at the user level, but all of the underlying infrastructure, whether onsite or outsourced. Many organizations believe that evergreen IT holds promise for reducing the resources and energy they need to expend on providing the up-to-date and flexible services that their users are demanding.

"

Source: Microsoft TechNet

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Key takeaways

Get a quick overview of the most important points as discussed in this chapter.

1 Defining the document lifecycle

This is defined as the stages which a document goes through, from the first moment of opening a template, to populating it with information, or re-using it for another purpose. The document lifecycle is the basis for understanding how template management features can help.

2 Features within the document lifecycle

Seeing how the document lifecycle flows, helps companies understand where efficiency features are most beneficial.

3 Evergreen is the way to go

SaaS template management vendors can provide software with futureproof capabilities built in. Having a solution that is always up-to-date ultimately saves time and money.
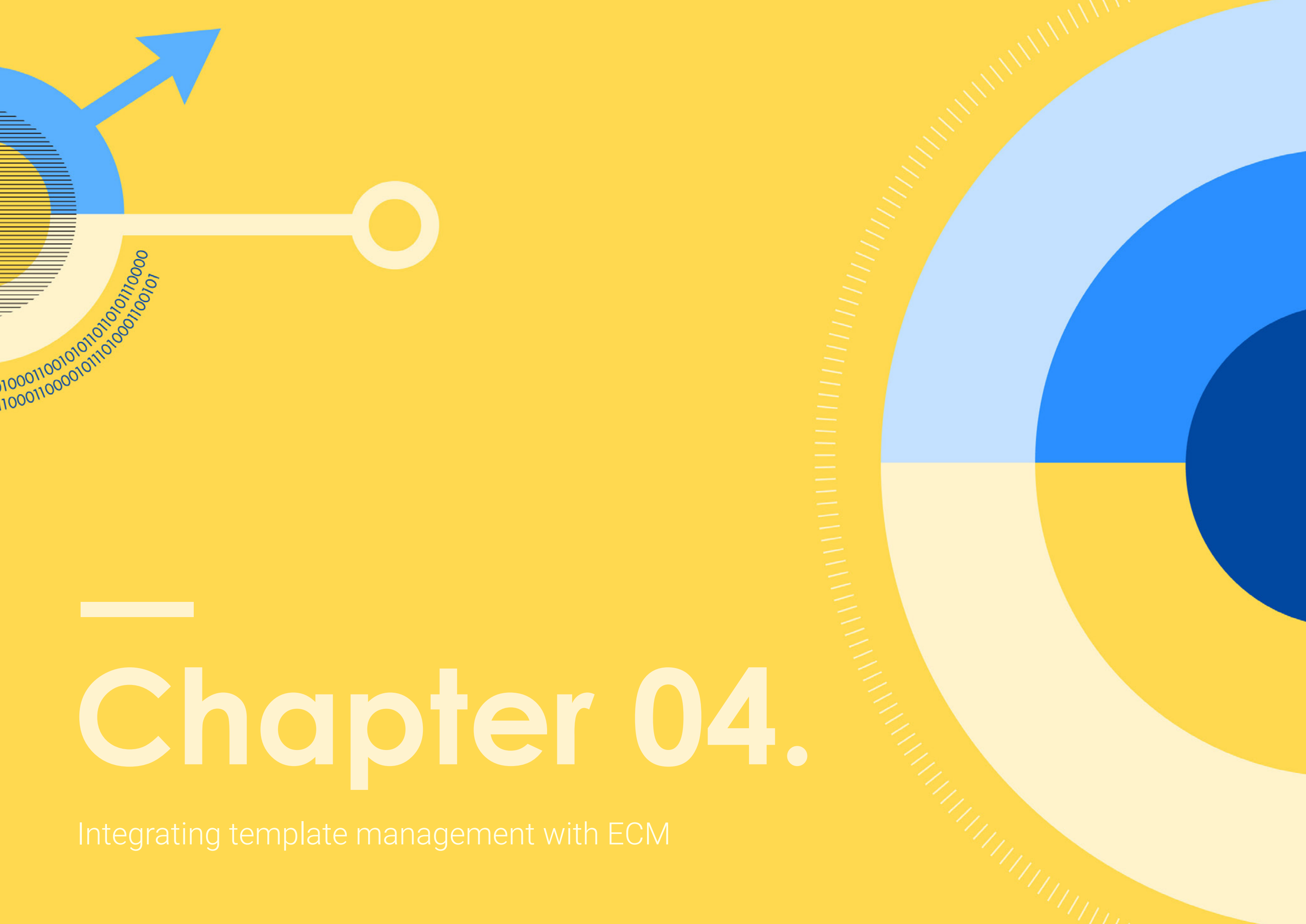
Chapter 04.

Integrating template management with ECM

One-page overview of what this chapter covers

The efficient creation of authentic documents depends on having a system that has smart document creation as its core competence.

In this chapter, get an overview of the most typical Enterprise Content Management (ECM) setups, what they consist of, and learn how template management fits in with enterprise IT ecosystems.

This chapter also looks at the core competencies of Digital Asset Management (DAM) systems, Document Management Systems (DMS), Customer Relationship Management (CRM) and storage systems, to understand how adding a smart template management system can enhance existing systems of Enterprise Content Management.

What is Enterprise Content Management (ECM)?

ECM centrally governs processes related to all the content employees are creating, starting from accessing the elements needed for work to get done. In other words, it's a starting point for the content that an employee creates. Much of ECM is about governing the processes, but not necessarily the content. Much of it is about access and productivity, too. Integrating a modern template management system to an ECM setup can change the way employees create documents, with far reaching benefits for both the company and the employee.

Learn about Enterprise Content Management setups

How modern template management systems can get the more out of existing ECM setups.

Looking at what is the document ecosystem

Explore the connections between company data in ECM systems and document creation.

How to integrate template management

Learn about the importance of strong API integrations for a healthy document ecosystem.

Get an overview of organizational benefits

Find out how employees, company administrators and IT reap benefits from strong integrations.

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What does a standard
ECM setup consist of?

A standard ECM setup typically includes DAM, DMS, CRM, Storage and some form of template management. Older setups often have a homegrown template management solution that requires modernization to get the most from other systems.

Large companies manage their business using more or less standard IT setups. Companies working with a lot of clients or end users typically have a DMS system in place. And companies who manage a lot of sales will have a CRM system to keep track of their customers. Additionally, storage tools, asset management tools, and Identity and Access Management systems are found in an ECM setup, plus some form of template management system.

Reasons to update a template management system:

- Older template management systems tend to be homegrown, on-premise systems that require a lot of maintenance.

- Older template management technology is not capable of utilizing the power in other systems in the ECM setup.

- Templates in older systems do not have the capabilities and benefits inherent in modern SaaS systems.

"In an IT context, integration refers to the end result of a process that aims to stitch together different, often disparate, subsystems so that the data contained in each becomes part of a larger, more comprehensive system that, ideally, quickly and easily shares data when needed."

Source: TechTarget.com

Typical components
of an ECM setup:

⊘ **Document Management System (DMS)**
(iManage, SharePoint)

⊘ **Digital Assets Management (DAM) systems**
(Brandfolder, IntelligenceBank, Bynder)

⊘ **Customer Relationship Management CRM systems**
(SalesForce. MS Dynamics)

⊘ **Storage systems**
(Dropbox, SharePoint)

⊘ **Identity and Access Management systems (IAM)**
(Azure, Octa)

⊘ **Template management systems**
(typically on-prem custom-built systems using static templates)

Enterprise Content Management and the Document Ecosystem

A Document Ecosystem is the connected ECM technologies that link their data to document creation apps. Integrating a smart template management system with an ECM setup can get the most out of all the technologies used in document creation, for an intelligent and secure workflow from creation to storage.

Document creation apps
Document creation apps (Word, PowerPoint, Google Docs, Excel, etc.) are where employees create business communications that utilize data from other ECM systems.

DMS
The core competence of a Document Management System is keeping track of company documents/cases.

DAM systems
DAM systems organize, store and retrieve rich media, and manage digital rights and permissions.

CRM systems
A Customer Relation Management system's core competence is maintaining control of the company's customer opportunities.

Storage systems
Enterprise storage is a centralized repository for business information that provides common data management, protection, and data sharing functions through connections to computer systems.

Security and identity management systems
Identity and access management refers to a framework of policies and technologies for ensuring that the correct people in an enterprise have appropriate access to technology resources.

The Definitive Guide to Template Management
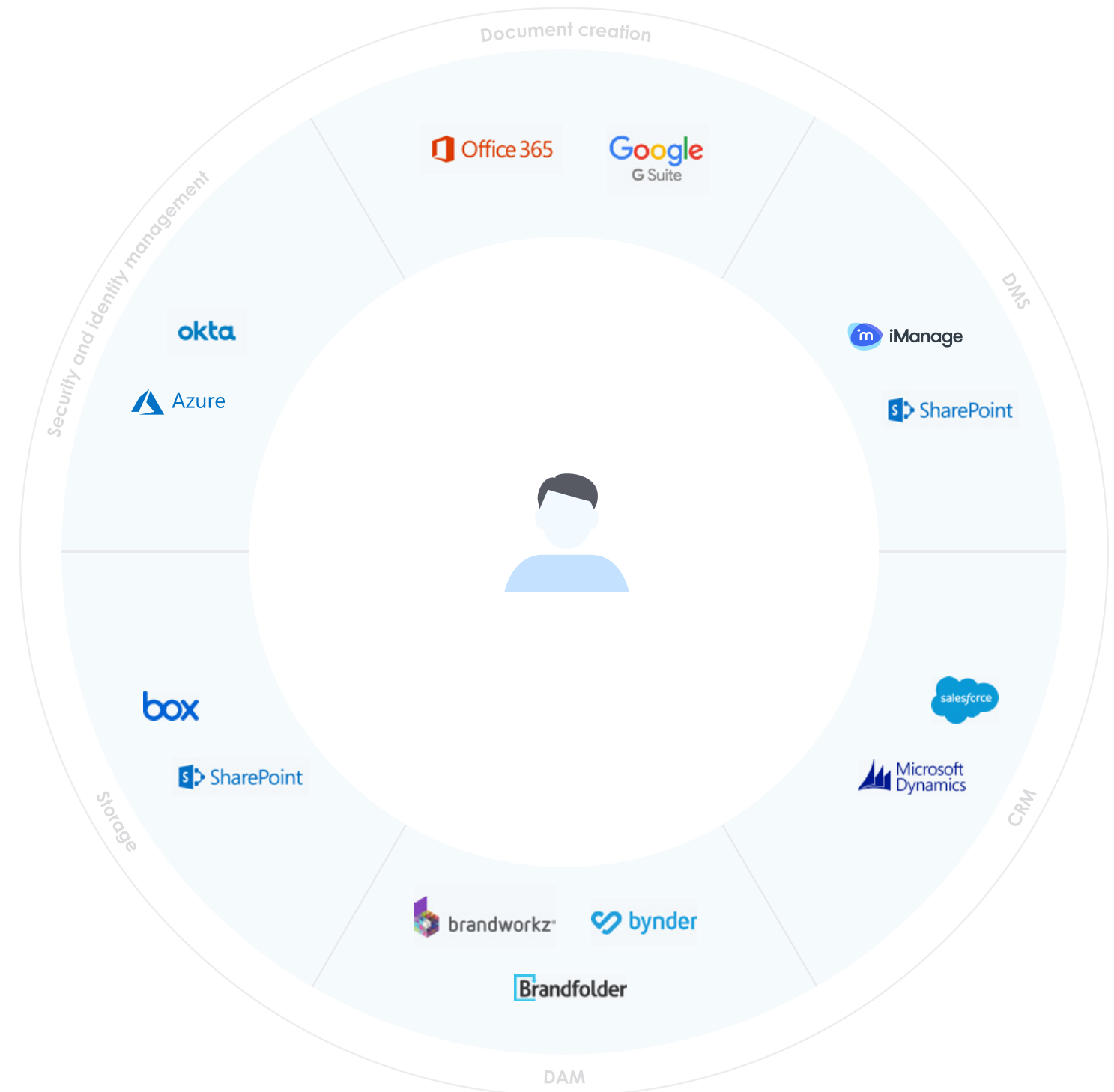
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How does template management enhance ECM systems?

The core competence of template management is to connect document creation apps with company data in an automated way, so the person creating the document doesn't have to think about where to find the data or whether the data is authentic.

When employees create documents outside of the DMS or CRM – by simply opening up a document creation app (e.g. word, PowerPoint, GoogleDocs, etc), it can be difficult to govern the outcome of that workflow.

On the admin side, updating logos and other company digital assets in document management systems is usually quite difficult. There are often many different templates for different scenarios and different cases. DMS or CRM systems don't have the same capabilities as template management systems do; their **core competencies** are case tracking and customer opportunity management, respectively.

Template management, on the other hand, can easily combine different parts of a document and **maintain data centrally**, because its very technology is built around documents. In that way, a template management system enhances the governance of documents and ease of user workflow, because that is its very reason for being.

Using a smart template management system means employees don't have to carry too many concerns about what document they're creating, because they're **helped by the template management** while creating the document.

To elaborate on the entire workflow, an employee would begin in the DMS or CRM, and that system would help them in the way it was designed to. In the next step, when creating a document to add to the case in the DMS, or for a customer in the CRM, it is when the employee gets into the document creation app where they are editing the documents that the template management system helps them.

Connecting all the systems to give the employee all the correct content right to their fingertips, just when they need it.

Having a template management system means **distributing the correct responsibilities** to the system that has document authenticity as its core competence: because no one system can do it all. Template management solutions are **context-aware** and bring all content directly to the employee's fingertips, right when they need. The document is at the center of the template management system, and its competence is in knowing what to connect to the user, and when.

Integrating template management and ECM systems

Whether a system in the ECM setup has an API or not will have a direct impact on setting up strong integrations to a template management solution.

Why integrate?

Integrating a template management system to other ECM systems (DMS, DAM, CRM, etc.) can bring huge benefits to both the employees, and the organization as a whole. It **connects** the document creator with all the data from other ECM systems, bringing a strong core competence that makes the employee workflow easier, smarter, faster and ensures the end result is authentic.

The technical side of integrating a new IT system requires that an API is available in the existing ECM systems. It is recommended to consider **API availability** before choosing a system for an ECM setup. The key to having a healthy document ecosystem is knowing that the template management technology can integrate well with other systems to help companies build a well-functioning IT system, where all the parts can "speak" with each other.

Questions to consider

Can your DMS talk to your template management system? Can it pull the right data, and save this back to the DMS? This question depends on the API of the DMS, and how open they are to integrations. The same goes for CRM systems - and can that CRM system speak with the eSignature system?

The bottom line is that when an IT system has an **API**, template management integrations can get a lot **stronger**, and the benefits to the company multiply.

McKinsey & Company

"

Application programming interfaces (APIs)… have now become a significant engine of business growth. As the connective tissue linking ecosystems of technologies and organizations, APIs allow businesses to monetize data, forge profitable partnerships, and open new pathways for innovation and growth.

"

Source: McKinsey

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Template management impact: employees, admins, and IT

A modern template management system can change the way employees work with documents, how administrators distribute and manage company content, and how the IT department operates. Learn about the impact from each of these perspectives.

Employee perspective

With a template management system, employees working with document creation have to **think less**. The result is greater productivity. This is because, with a modern template management system, many tasks that were once manual are now **automated**. The need to check that templates and available content is correct is eliminated. Automated updates ensure that the document always stays up to date with the latest company data.

The power of technology can be taken advantage of in a way that helps employees build compliant, authentic documents easily. Everything that employees need to create an authentic document - whether it's a letter, presentation, sales contract, or email - is made **available right at their fingertips**. Because the content and templates are centrally governed, trust is built into the workflow from management to employee. This is what template management cares about; taking employees by the hand at the exact moment they are creating a business document.

Admin perspective

Maintaining **consistency and staying on-brand** are some of the biggest challenges administrators and brand departments face when not every document produced goes through a system in the ECM setup – the DMS for instance. In such a situation, maintenance can be cumbersome.

Updating templates or company logos can be a huge task if there are multiple systems where these updates must be applied, for example, if there is a DMS, a CRM and a homegrown template management system in place.

The ideal situation is having a template management system that acts as the **central data source** for all these **brand elements and templates**. This reduces a huge task to a simple one: maintaining everything in one place from where it is **distributed** to all the different systems that are utilizing the template management system. Maintain it once, and make it happen everywhere.

IT perspective

From the IT perspective, integrating a modern template management system means that maintaining brand and document assets is work that can be carried out by non-IT staff. This means no more tickets for the cumbersome task of **updating templates** – which is often the case with old, on-premise template management systems.

The IT department is **no longer required** to carry out company-content related work that can be managed by those who are in fact in charge of the content. **Branding teams can now update** company brand elements, communications teams can maintain templates, and so on.

A Forrester TEI study published in 2019 for Templafy concluded that **95% of IT's involvement is eliminated once template management is deployed**. This is due to the template management system putting tasks such as updating templates and content back into the hands of branding teams.

Source: The Total Economic Impact™ of Templafy, a June 2019 commissioned study conducted by Forrester Consulting on behalf of Templafy

Maintenance and cost **benefits**

Template management systems provide a significant benefit to the company in terms of time and resources saved on the maintenance of company templates. The ability to maintain templates and assets in one centralized place drastically reduces maintenance workloads.

With older systems, costs of maintenance in terms of time and resources can quickly spiral. For example, if a company has 100 templates and the company header needs to be updated, the task requires that each of these 100 templates is accessed and updated. But you also have these same 100 templates per system in an ECM setup: if there is a DAM, a CRM and a DMS plus the homegrown template management system; now there are 40,000 templates to update.

Controlling maintenance and cost, globally

Companies with multiple office locations, multiple languages, multiple legislation, and multiple brands face an **exponential increase** in template management. Making the switch to a template management system that is capable of making **global updates drastically reduces maintenance costs**.

The difference in a modern template management system is that it is fully integrated into the DAM, DMS, CRM, and anywhere else it benefits the company; with **one single update** to the header of the template; all templates across all systems – **globally** – are up-to-date.

Thought leader opinion:
Oskar Konstantyner, Templafy

Templafy is a global market leader in enterprise template management with a cloud platform designed to connect all aspects of document creation.

Templafy

What does adding a template management system bring to an ECM setup?

"It adds the ability to control your document and presentation workflow, automate more things, and make people's work more compliant and productive. A template management system can pull in data from all the other systems in a document workflow and use automation to fill in what needs to be filled in. It will prevent human error and make people more productive, because you don't have to spend time finding the data.

For example, if you're making a contract and using Salesforce as your CRM system, you just click "create a contract" and the template management system opens up in Word. Straight away, all the company-approved paragraphs you need are automatically added, because it knows what is required from Salesforce. You might just have to make a few manual changes, then you save it back, and send it out. That's the power of template management."

Oskar Konstantyner, Product Owner, Templafy

Thought leader opinion:
Oskar Konstantyner, Templafy

"Each system in an enterprise ecosystem is in some way designed to help you be more productive. Template management brings that power to document creation."

Templafy

"To take the example further, if you use those same company-approved paragraphs in multiple contracts, CRM systems are not good at handling them - they cannot help you make sure that the paragraph in the contract is always the same across different contracts.

A template management system can do that because their power is documents. But with Salesforce, for instance, their power is making sure you have control of your opportunity. If making contracts or other documents are at the core of your work, then integrating template management to your workflow will be hugely beneficial to getting that work done in a productive and compliant way.

Each system in an enterprise ecosystem is in some way designed to help you be more productive in your work. Template management brings that power to document creation."

QUICK TIP

A template management system can pull in data from all the other systems in a document workflow and use automation to fill in what needs to be filled out.

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Key **takeaways**

The Definitive Guide to Template Management

Get a quick overview of the most important points as discussed in this chapter.

1 Adding template management connects existing infrastructure

Without template management, companies are losing out. Template management systems do not replace DAM, CRM or DMS. Rather, a template management system will enhance the offerings of these vital systems in the document creation workflow.

2 Get strong integrations with a template management system

APIs provide the gateway to a strong connection between a template management system and ECM technologies. When these technologies can play well together, the result is a healthy document ecosystem that helps employees produce authentic documents faster.

3 Aggregating enterprise content is a win-win situation

When DAM, DMS, CRM, Storage and Template Management systems are each performing their core competence, the management of company documents and document assets is a simplified task that frees up IT resources, puts content maintenance back in the hands of the content admin, and places the correct content and templates directly into the hands of employees who need them.

Chapter 05.

The business case for template management

Templafy

One-page overview of what this chapter covers

Learn about the different factors relating to making the business case for template management.

In this chapter, learn about the most important return on investment factors from a template management system, and how to build a strong business case for getting a template management system.

The three main reasons to have modern template management:

1. Template management can increase productivity in the production of company documents.

2. Template management benefits brand management through the ability to easily govern and update the brand from a central location.

3. A template management system will help ensure the production of compliant and legally up-to-date documents.

This chapter will present information about the ROI research of the core business case for template management.

Learn about the core business case

Save time and money, measure and optimize productivity. Ensure compliance, build trust and invest in a future-proof scalable IT infrastructure.

Find out ways to calculate costs

Use the checklist to calculate and estimate the costs of implementing a template management system in the organization.

Other investment factors worth considering

Consider other investments such as consulting, building new document templates. Hiring experts and staff training.

Learn how to sell template management internally

Advice with pitching and selling internally, helping an executive team see the value of investing in template management.

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ROI over time of template management

Forrester research demonstrated that by deploying template management, the company achieved a significant productivity uplift for end-users, the branding team, and the IT team by simplifying the process for updating and using the organizations' templates and branding assets.

A value of being more consistently "on-brand" made possible by template management

The primary quantified benefit of template management is productivity savings for end users, resulting in **$4.0 million of benefits**. Rolling out the template management platform facilitated the content creation and review process for the company's employees, making them more productive at their jobs. This productivity was due to the increased ability to find relevant templates and content compared with their previous environment, as well as an automated document validation module.

The study also shows an average time saving of **4 hours per week** for employees creating documents, presentations, and other content within an office software suite. Taking those 4 hours and multiplying that by the number of employees who work in an office software suite, it is clear to see how the template management platform can pay for itself in **just 3 months**.

The same study also found that **95% of IT's involvement** was eliminated once the template management is deployed.
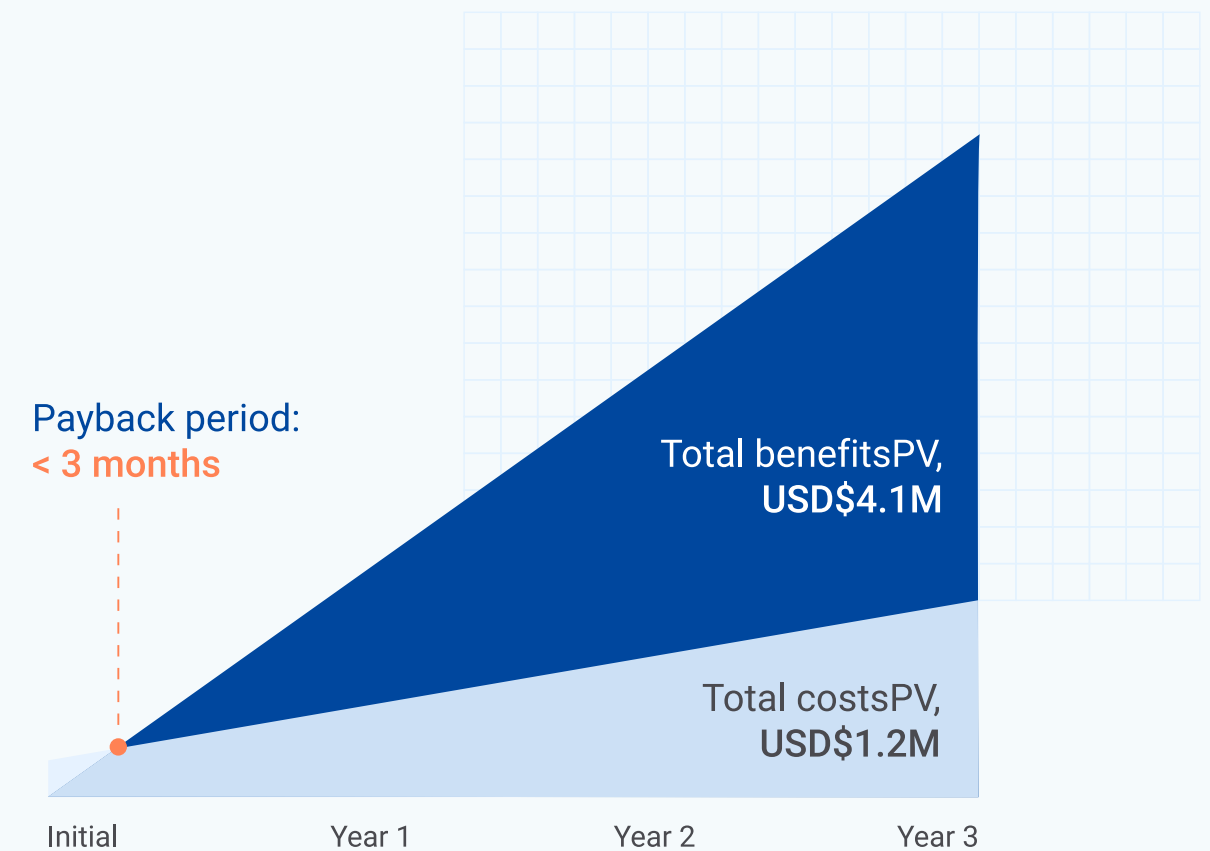
Payback period:
< 3 months

Total benefitsPV,
USD$4.1M

Total costsPV,
USD$1.2M

Initial   Year 1   Year 2   Year 3

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Summary of productivity, document control, validation and compliance

The table on the right shows the total of all benefits across the areas listed below, as well as present values (PVs) discounted 10%. Over three years, the composite organization expects risk-adjusted total benefits to be a PV of more than $4.1 million.

QUANITIFIED BENEFIT DATA AS APPLIED TO THE COMPOSITE

BENEFIT	YEAR 1	YEAR 2	YEAR 3	TOTAL	PRESENT VALUE
Productivity savings for end users	$ 1, 559, 250	$ 1, 637, 213	$ 1, 719, 073	$ 4, 915, 536	$ 4, 062, 133
Improved content governance	$ 5, 586	$ 5, 586	$ 5, 586	$ 16, 758	$ 13, 892
IT productivity and costs savings	$ 10, 959	$ 10, 959	$ 10, 959	$ 32, 878	$ 27, 254
Total benefits (risk-adjusted)	**$ 1, 575, 795**	**$ 1, 653, 758**	**$ 1, 735, 618**	**$ 4, 965, 171**	**$ 4, 103, 279**

Source: The Total Economic Impact™ of Templafy, a June 2019 commissioned study conducted by Forrester Consulting on behalf of Templafy

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Core business case
for template management

Understanding the benefits of a template management system and the return on investment potential in order to make a business case for investment.

There are **four main** benefits to document template and content management as seen on the right.

Key considerations here are: how can a company tap into their **existing investments**? If a company uses Microsoft Office, and the company knows their employees, can that knowledge be utilized to tap into the core of how the **business functions** on a daily basis when producing documents?

The core business case will look into how template management can help the company to **save time and money**, ensure **compliance** in documents produced, measure using **analytics** and optimize based on **results**, and how to **futureproof** the IT infrastructure.

1. Save time and money
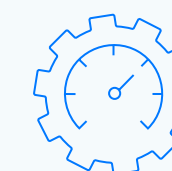
2. Measure and optimize
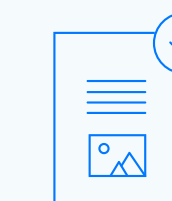
3. Ensure document compliance

4. Futureproof IT infrastructure

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Core business case:
1. Save time and money

Template management systems save time and money through enabling access and automation.

Getting signoff

Generally, the best way to get CFO signoff on document template and content management is to build a business case for modern template management on its ability to save time and money.

There are two tried and tested ways to save companies money with modern template management:

1. Access

Making sure that employees have the right template, document and content when they need it, right there in the applications they work in means that everyone can work faster and the output is up-to-date and reliable.

2. Automation

By investing in the technology to automate document workflows, companies are able to reduce resource cost spent on document management by up to 32%.

Document template automation can reduce tasks, from taking hours to create a report to taking just a few minutes.

Without automation of dynamic templates, there are a lot of overheads in terms of hiring people to do the work manually.

Core business case:
2. Measure and optimize

Analytics and tracking content capabilities means workflows can now be measured to optimize employee workflow and measure brand investments in four ways.

1. Measuring activity

Modern template management provides the core system of record for all company document templates, content assets and employee usage information. If a company doesn't have a system of record for employee document usage and creation, then it can't be measured and understood in a beneficial manner.

2. Optimizing content

The ability to run tests such as this content vs. that content, and this template vs. that template helps companies learn what works over time, which ultimately leads them to better optimization and more revenue.

3. Productivity impact

With business operations employees having access to tried and tested compliant content faster than ever before, documents are produced with greater efficiency. Admins and managers now have an overview of document usage, and this allows workflow decisions to be optimized to directly impact and support revenue growth.

4. Prove brand investments

Data reports from template management can show which templates, documents and brand assets are working, and help understand the specific amounts of revenue saving and generation. This allows brand teams to put budget where it's proven to work best.
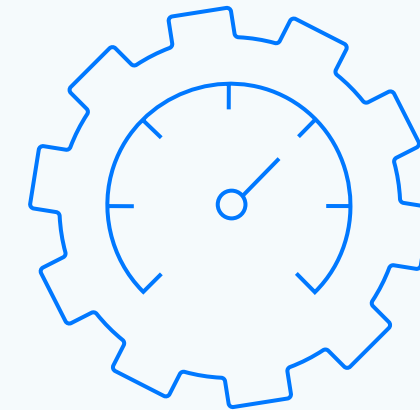
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Core business case:
3. Ensure document compliance

A template management platform enables companies to effectively and efficiently manage their enterprise document ecosystem. Governance of new areas is now possible, ensuring employees access to up-to-date, consistent, and legally compliant content.

Strengthen company brand
Brand-compliance is inbuilt into the document templates and assets in the template management system, and governed by the company.

Authentic and efficient
Having the latest templates and document assets available to create an authentic document mean it is produced faster and more efficiently.

Trust and insights
A secure workflow can be trusted by everyone, where company administrators have control over brand and legal assets. The template management system provides data on assets and template usage.

Scale compliance
One compliant company template is formatted based on every individual in every office location, therefore scaling compliance globally is simple.

Update and access content in an instant
Up-to-date and consistent use of content, and access to all the company's communication assets including meta data tagging in documents.

Workforce alignment through professional standards
Every company document is produced to the same professional standards by all employees - an enablement of workflow best practices.

The Definitive Guide to Template Management
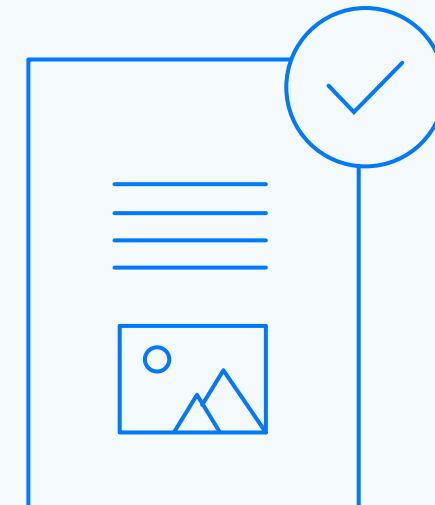
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Core business case:
4. Futureproof IT infrastructure

SaaS evergreen solutions enable scalable infrastructure. A look at the challenge and solution of adding an evergreen template management system.

The challenge

Servicing business enablement along with demands from communications can be challenging for IT departments. Then add the complexity of migration to the cloud, scalability of IT services, selecting SaaS vendors and ensuring secure remote access for employees across a global organization and heads may start to spin.

Deploying evergreen solutions that are secure and agile are now the requirements for most IT departments. One of the largest challenges is integrating a hybrid on-premise and cloud setup.

The solution

To succeed and win in this highly complex and lightning-fast business environment, managers and decision makers must possess a high level of agility—that is, they must have the ability to quickly optimize communication activities based on changes in market conditions or employee preferences and behavior.

This means that accessibility and instant updates of content is essential to ensure that IT, sales and marketing can respond with nimbleness, control, and finesse across the entire organization.
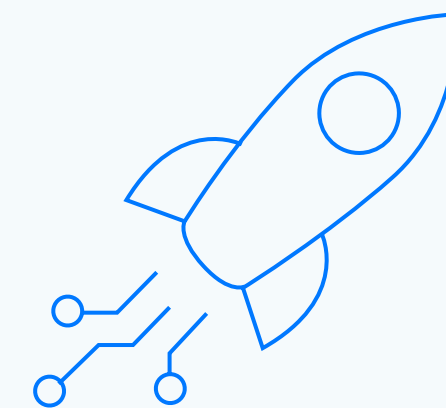
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A case for
template management

A case study showing how a template management system was the best way to introduce newly updated core visuals following a brand relaunch.

Company
Coloplast

Business area
Healthcare

Number of employees
12,000

Coloplast

SITUATION REQUIRING SOLUTION

Ensuring that employees worldwide would use the updated brand assets and Office document templates following a brand relaunch.

Coloplast was in the process of a worldwide brand relaunch to almost 12,000 employees, across 55 countries. They had created new brand assets and document templates, but needed a way to guarantee that their employees would actually use the updated versions.

It was also going to be easier for the new brand identity to be used if the IT department did not have to be involved in every step of the process, but instead it could be carried out completely and deployed quickly by the marketing and communications department.

Wakana Pivoteau Sakihama
Head of Corporate Branding

"

In the light of our recent brand relaunch, the update of core visual assets in Microsoft Office templates were key.

"

A case for
template management

Solving the problem with a template management solution.

Coloplast adopted a template management system which opened within Microsoft Office applications, allowing employees to access updated brand assets from where they work.

Coloplast

OBJECTIVES

Access
Employees can access approved content easily, ensuring their work is always on-brand and compliant.

Update
Changes are applied within minutes, so employees can always use the latest versions of content.

Control
IT departments are no longer relied upon as brand management departments can take control for updating content.

RESULT

The brand management department can now update content quickly and easily, and employees can access this updated content from within Microsoft applications. Employees can create on-brand and compliant documents much more easily, and time is saved for the IT department, who are no longer responsible for managing content.

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Homework:
Calculating and estimating costs

Calculating and estimating costs of implementing a template management solution.

Understanding the investment required in order to get returns

Once there is an estimate of the returns from a modern template management platform, it is time to develop the other side of the business case by understanding the investment required.

Use this **exercise sheet** to estimate the necessary costs involved:

Homework exercise sheet

⊘   What is the baseline annual resource cost?

⊘   How much time is spent creating documents?

⊘   How many employees work in Microsoft Office or G Suite?

⊘   How much time is spent controlling employee output?

⊘   How much time do brand managers spend controlling document output?

⊘   How much time does IT spend maintaining templates & documents?

⊘   Calculate the amount of resources and cost of IT support.

⊘   How will template management improve your productivity?

⊘   Estimate your overall efficiency savings.

⊘   How do the previous two points translate into improved workflow?

⊘   Estimate the total economic impact template management will have.

⊘   Estimate the effect to business revenue that will result.

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Other investment factors
of template management

Additional questions to consider when investing in template management.

Most document template management vendors offer add-ons to their basic software subscriptions—including employee enablement, premium template development packages, education and training. The purpose of these is to accelerate ROI and time, and the costs of these add-ons do not tend to exceed 20% of the software subscription.

The best results of template management come from looking beyond the software. The entire process should also be looked at to ensure all the ingredients for success are there.

Some questions to consider:

1. Does the company generate enough documents, presentations and emails for template management to be worthwhile?

2. Does the company have enough template content?

3. Does the company need to modify the end-to-end IT infrastructure?

4. Does the company have the right staff skill set to aid the process?

Depending on the complexity of the vendor selected, the marketing document template management maturity, and ROI goals; it may be necessary to look at additional investments in these areas.

See chapter 06 for a deeper-dive into non-technology investments required for template management success.

ROI

Thought leader opinion:
Kim Kisbye, SkabelonDesign

SkabelonDesign is a template designer and market leader when it comes to the implementation of visual identity and the design of client-specific template solutions in the Microsoft Office Suite.

Skabelon Design

Can you give some advice for starting with template management?

"I think the most important part is to synchronize with the needs of your users.

So in big organizations, you have a lot of different needs, a sales guy doesn't have the same needs as a guy sitting in R&D for instance. So you need to determine what kind of needs is it that they have. Is it in PowerPoint? Is it sharing pictures? Is it making proposal quotes and stuff like that?

Being able to address the different user group needs is the most important thing. And with a good template management solution you can address all of those needs, but you need to customize the solution that your provider gives you, to the needs of your organization.

We often do surveys internally with our customers, digging into specific needs within different departments and involving the end-users. You often have heavy users in different departments. Involve them! They are the users that know where the issues are that we want to solve when we handle our templates."

Kim Kisbye, Head of Sales and Marketing, SkabelonDesign

Selling document template management internally

Aligning with the company's strategic objectives is the best way to help an executive team see the value of investing in template management.

Sometimes, an executive team won't immediately see the value of an investment in document template management. In order to convince them, it's important to **understand their priorities**—and what challenges stand in their way. Align with the company's strategic objectives, connect the dots for them and position template management to address their specific concerns.

When trying to gain internal support for a template management purchase, **position it based on the problems** that the overall business has now, and how that impacts every individual. In this way the organization will see the business case as a priority right now.

The ability to deliver a compelling business case for template management will depend on how well the structure of the argument is to resolve the main business challenges and priorities of the specific organization. No matter which executive it is that needs to be convinced, make sure to **manage expectations** about the time to value and effort required.

Be careful **not to overpromise** and under-deliver. Implementing document template management is not something where everything is implemented and solved in a click. Getting the real value of the right setup takes time, planning and effort. The buying committee will appreciate and respect a **pragmatic**, level-headed approach.

Many executives think of document and template management as a marketing communications area, a cost center, not a **revenue-driving opportunity**.

Many executives are loathed to invest more resources into a cost center. Why invest in a new platform, they ask, if it will just produce mediocre results and most employees won't use it? Needless to say, it will be necessary to address some of these perceptions head-on when making the case for modern template management.

Five tips for selling template management internally

Tried and tested tips for getting approval for modern template management from your executive team.

1. Seek to understand management's objectives. Understanding management's collective and individual goals will help to present a case that meets their felt needs.

2. Create a financial case that lines up with management's objectives. The key is to work backwards from the main objectives that the executive team holds. If productivity savings is their main objective, then make the case based on productivity savings.

3. Discuss, don't present. Start by asking questions that seek to understand what the executive team are looking to achieve. Then transition by saying, "If I could show you how to meet those objectives efficiently and effectively, would you be interested in learning more?"

4. Support the case with real life case studies. This will help answer the potential question: "This all sounds good in theory. How do you know it will work?"

5. Be ready if they say yes. Have a high level plan ready with an overview of the next steps, time-frames, and required resources.

QUICK TIP

Before approaching the executive team, come armed with research. Fill out this worksheet to find out why your company is ready for a modern template management system.

Selling internally:
CEO

Understanding and addressing the primary concerns of Chief Executive Officers.

Concerns

- **Build and align the organization, enhancing collaboration**

- **Innovate and out-execute the competition**

- **Attract and retain talent**

- **Grow revenue and "make the number"**

- **Manage costs and meet shareholder expectations for profitability**

- **Manage risk**

Advice

Contextualize template management as the key to productivity gains and business growth for the whole organization.

Next, position it as a solution to enhance workforce alignment effectiveness, and a way in which every employee who works with documents will be more productive.

Instead of talking about template management, talk about the predicted performance improvements that will be gained from knowing precisely which activities support revenue growth, which waste it, and how to optimize marketing communication's content investments.

The Definitive Guide to Template Management

Selling internally:
CMO

Understanding and addressing the primary concerns of Chief Marketing Officers.

Concerns

- **Measure and prove brand and marketing asset ROI**

- **Build alignment with the sales team**

- **Improve marketing credibility in the organization**

- **Provide accurate content**

- **Manage and leverage growing complexity, and optimize processes**

Advice

Reduce the threat of increasing complexity by positioning template management as the key to improving marketing's ability to adapt to changes.

Next, discuss template management as a key function for bringing marketing and sales into better alignment. What CMO doesn't want to hear praises, not complaints, from the head of sales?

Finally, rally support from the rest of the executive team, so the CMO perceives an investment in template management as a low-risk decision. This will protect their credibility.

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Selling internally:
CIO

Understanding and addressing the primary concerns of Chief Information Officers.

Concerns

- **Make investments that support the business**

- **Manage security and risk**

- **Innovate and evolve infrastructure for the future - from mobile, SaaS, etc.**

- **Control costs**

- **Able to adapt to Microsoft Office or Windows-based PCs**

- **Utilize the cloud**

- **Support multiple devices**

Advice

The CIO is concerned with digital transformation, and mostly forward-thinking when looking at technology. They may ask how to ensure investments will help the business move forward in this very fast digital world. And this definitely involves template management, because it is a major part of what most employees are actually using.

A large company may produce millions of documents, presentations and emails weekly, or even daily. Typically, the CIO will be considering how any platform connects with the rest of the IT Infrastructure Investments; Office 365, Office online, G Suite and other tools.

Employees want to be able to work on any device, and a CIO knows the challenges of flexible workplaces, so template management systems which are cloud-based will appeal.

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Selling internally:
CFO

Understanding and addressing the primary concerns of Chief Finance Officers.

Concerns

- **Manage expenses associated with software investments**

- **Contain risk pertaining to financial investments**

- **Enable profitable growth**

- **Plan for the future**

- **Save time and money on employee resources**

- **Reduce or eliminate cost centers within the organization**

Advice

Do the math. Present a developed business case, and don't worry too much about making estimates, provided they're clearly labeled and based on internal data. Build credibility simply by walking in the door with a spreadsheet of numbers and speaking the CFO's language.

Focus on cost center reduction. Modern template management allows non-IT people to do any update in an agile manner, meaning less reliance on IT support, which decreases the cost of back office staff. There will be minimal maintenance once the template management platform is set up: it is a one-stop-shop to change any content and template. This takes away a huge amount of cost on just the administration side.

Selling internally:
CTO

Understanding and addressing the primary concerns of Chief Technology Officers.

Concerns

- **Reaching the business goals through technology**

- **Control of which software is installed on which machines**

- **Security threats and malicious software**

- **Software vendor reduction and shadow IT**

- **Security for the entire IT infrastructure and individual machines**

- **Cost control and cost center reduction**

- **Ensuring a stable and scalable IT network infrastructure**

Advice

The CTO is cautious about implementing externally built and controlled software that can install and run updated executable code. This is due to concerns about IT security threats as well as maintaining control and accountability over the entire IT infrastructure.

Conduct due diligence and show that companies with the highest security standards, such as Magic Circle law firms and the "Big Four" accounting and auditing companies, have approved and implemented cloud-based 3rd party template management software.

Authentication requirements can be fulfilled with solutions such as SSO (Single Sign on). Additionally, cost center reduction is attained through secure and low maintenance requirements of the software.

Templafy

Key takeaways

Get a quick overview of the most important points as discussed in this chapter.

1

Research to know what business areas will benefit

Template management can bring productivity and efficacy to the company. When making the business case, do the homework - it's important to know the exact areas of the business that will benefit.

2

Come armed with ROI statistics

With independent research demonstrating investment payback periods of less than three months is realistic, it makes the business case for investing in template management significantly stronger.

3

Selling internally: know who to address

While the benefits for template management are company-wide, different members of the executive team will be responsible for the decision-making process, so it's important to understand the value that template management adds from different perspectives.

Chapter 06.

Getting set-up for success with template management

Templafy

One-page overview of what this chapter covers

There are success factors other than the choice of template management software to ensure success with a new technology. Learn about other considerations worth taking into account.

Investing in a template management platform is like buying a powerful car - no one would buy a Mercedes Maybach and keep it in the garage. But that's what happens when companies purchase a document template management platform without having a strategy or implementation plan for using it.

There are multiple types of template management platforms on offer, and important differences between each. Going beyond the software, there are also other important success factors to consider, which are not related to the platforms' capabilities.
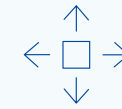
Understanding the scope and rollout

Structuring template management solutions to your company needs.

Learn about the implementation process

Choosing which templates and content, and who gets access.

The importance of having the right people

Having the right team for success with template management.

Learn how to maintain success longterm

Infrastructure investments are the elements to maintain success.

Templafy

Scope and rollout:
Part 1

There are a whole range of template management platforms, and various possibilities for how to set these up. The main things to consider for a successful setup are listed here.

Accessibility to templates

Some template management systems allow employees to have direct access to templates and assets from within the document creation app. There is no longer any need for employees to use shared folders, the company intranet, or a file downloaded to their desktop to find company templates.
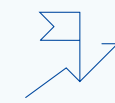
Personalization and assisted document creation

When employees create documents, some template management systems can base this on who the employee is. These template management platforms can present questions to the employee through UI, and an authentic document is dynamically put together for that employee based on their answers to the questions. This is assisted document creation, or assisted assembly.

Instant updates

Modern template management provides platform administrators with the possibility of instant updates, so rollout of content changes, such as legal disclaimers and other updates can happen across the whole organization through just the click of a button.

System integrations: DAM, DMS and CRM

DAM integration means that employees can access images and other document assets from directly within the document creation app. DMS integration also means the documents can be accessed in the app but are automatically located and stored back to the DMS. CRM integration means that relevant meta data can be automatically pulled into the document template.

Christian Lund
Co-founder at Templafy

"

Essentially, you want the right people to get access to the right content.

"

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Scope and rollout:
Part 2

To have success with modern template management solutions, the company must understand what it is they want to achieve with their template management setup. The main considerations for scoping needs by department are listed here.

Understanding employee workflows

Old processes will be quickly redundant when you are introducing modern template management into your organization. New technology requires simpler ways of working, so building the solution around effective and user-friendly employee workflows is imperative. When it comes to SaaS document template management, the most important thing to understand is that knowing the workflows is the key to success.

Some useful questions to help scope the needs of each department:

Questions for business operations

- What is the outcome of a successful document?

- How do employees work when they create company documents?

- How can a company ensure and maintain quality?

- How does a company get this solution out to everyone?

Questions for marketing and communication

- How do marketing and communications maintain and update existing templates, and introduce new content?

- What processes are in place to ensure employees stay on brand when creating documents?

- How does marketing make sure that the latest content is always accessible for all employees in an efficient manner?

- How does marketing measure and optimize the performance of documents and content?

Questions for IT support and maintenance

- How does IT update document templates?

- Which SaaS platforms have IT invested in already?

- How do admins access templates and document assets?

- What data is available around content performance and usage?

QUICK TIP

To ensure that employees will use a new solution, examine the existing company workflows and processes. Set the intended goals around these workflows, and then scope for the project.

Implementation of company templates and content

Things to consider when building the ideal template management setup for the best results.

Work with an **implementation partner** and invest in getting great templates. If templates look good and are pre-filled with relevant content, then they will be a great starting point for creating a document.

Employee buy in

Plan some **training** to get employees on board. Employees will revert to old habits if they are presented with a bad template management solution or a poorly thought through workflow. A good workflow that supports employees reduces the use of alternatives and shadow IT.

Scoping employee workflows

Companies usually already have templates. However, these are often located and stored in intranets or file shares. These are legacies of backward facing workflows, and mean that assets and templates are just that little bit too far away from the employee's immediate workspace. Essentially, this results in the majority of employees not using the correct up-to-date templates.

The ideal template management setup supports whichever application employees are working in - this could be PowerPoint, Word, Office 365 or apps from G Suite. Document templates that are **available directly** in these workflow scenarios or **embedded** in these apps allow employees to access content directly where they already work.

Accessibility and employee workflows are the starting point, and for some companies that's enough. But for most, it then graduates into the next step; where the template management platform **helps employees** put the documents together.

Scoping dependences and company document structure

The way in which an organization is structured impacts the dependencies that must be considered in structuring documents and templates. For example, one document template may need to be distributed to offices across the world where employees are working in different languages, requiring different layouts, different regional disclaimers, account information, and so on. That's a lot of variants to consider, but some template management solutions can assemble all these **personalized document attributes automatically** to the one base template.

A template management implementation partner can help assess the **types of templates** required for optimal workflow in an organization. Template management systems that allow the company to have dynamic templates and document assets structured and managed separately should be considered - these allow elements such as logos, language settings, location, department, and legal disclaimers to be maintained separately. Assisted assembly possibilities for document creation are supported by these **separate storage structures**.

Next level implementation

Assisted assembly is when an employee is creating a document and all the required aggregates are compiled together into an **auto generated document** through utilizing the technology of the template management platform.

This technology creates the document based on who the employee is. The template management UI presents questions to the employee, and based on their answers, an authentic document is dynamically put together for that specific employee.

This function not only assists employees in building authentic documents, but also **automates** the process of ensuring that employees **access document templates** that are accurate, with content that is correct and up-to-date.

Personalization

With **personalized access**, employees are offered a simpler way to structure the solution, because one template can eventually become thousands of unique versions, depending on the context of who the user is, and what happens as they go through the process of creating a document based on the template.

A solution which offers these supports the company, the business, and specifically the administrators, as they make it easy to maintain the document content ecosystem.

Business infrastructure investments

Align with the priorities of CIOs, who are concerned with future-proof, scalable solutions.

Moving the business infrastructure forward undoubtedly involves templates and template management, as this is such a significant part of what employees use on a daily basis.

Large companies produce millions of documents, presentations and emails on a weekly - and sometimes even daily – basis, so unsurprisingly the document infrastructure is a large part of the technical set up. Due to this, when looking for a template management system, the CIO's team is concerned with the implementation, and how it **connects and supports** the rest of their **IT investments**.

The important integrations for document creation are Microsoft Office and G Suite, along with some other tools. It's also important that access can occur from **multiple devices**, as this means employees are able to work on whatever device they are using. This access is vital - a company cannot have part of a key item of infrastructure restricted to "Old World" systems, which are soon to be redundant, and also now a dated and ineffective way of working.

Scalable IT infrastructures that support Microsoft Office and Office 365 should be built and invested in. Simultaneously though, company document templates should not be restricted only to these apps, and should instead **integrate** with a chosen DAM, and other relevant systems. It's important to also think about requirements for **connecting data** from CRM or HR Systems to leverage the investments that have been made in to the existing IT setup.

Take a forward-thinking approach and make sure the investments will integrate well with each other, creating a multi-platform setup that is scalable and future-proof.

"

We must not drop behind the digital curve. We need to make sure that we make investments that will help our business move forward in the fast-moving digital world we live in.

"

Every CIO
At every enterprise worldwide

Getting the right people
for success

Having the right internal employees, as well as external service providers, is critical to the successful implementation of a new template management solution.

The team

To successfully implement a template management solution, the company needs a great team in place.

Essential team members are:

- **Project manager**
- **Platform owner**
- **Executive sponsor**
- **Template owner**
- **Template management admins**

A strong team with the right skills and well-defined roles, featuring people who know what to do and when to do it, are the key to success.

Timeline

Set the timeline for template management with clear deadlines and clear milestones. Remember to consider all the key project phases: implementation, deployment, platform launch, and platform maintenance.

First level support and ambassadors

Create first level support through internal helpdesk experts. In large companies, it is common practice to assign ambassadors (super users, champions, etc.) who receive feedback and act as helpdesk buddies.

Ambassadors sit between admins and users, working beside first level support. Before launching the template management solution, identify employees who could be ambassadors for template management and support the new document workflow.

Ambassadors will need training, assigned value in their role and given responsibilities to help maintain success after the launch of the platform. Most importantly, the employees selected to be ambassadors must be the correct fit from the organization's perspective. The choice of ambassadors need to make sense, so select wisely.

Evaluate the skills of the team when considering ambassador choices. If the company does not have the right skills on-staff, there needs to be a sound argument for further training of current staff, use of external consultants, or additional hires.

Templafy

Maintaining success
going forward

Internal employees, as well as external service providers, are a critical aspect for success with a new template management solution.

Scope

Avoid moving the goal or target - the scope of content should be clearly defined. The scope is what is needed and why, and this needs to be at the heart of the decisions being made.

Think big. Start small.

Start with a project goal that is easy to grasp: a global letter template is a good choice. In this example, the correct and updated letter template was difficult to locate and did not work correctly with some employee user profiles. The letter template is used thousands of times a day, so this should be made a priority and implemented.

Following on from this, set the amount of content or dynamic templates to be delivered. Remember that the scope should be limited and relevant – with SaaS you can always scale. Scale as you go, scale as you grow.

Deployment

Consider which approach to take – this may be a phased, or a big bang approach. The choice of approach is heavily dependent on how the organization works.

Launching

Consider how to communicate the launch of the template management platform to the entire company. Make a communication plan work with the deployment team that highlights all launch tasks for both IT and marketing/communications.

Set up for maintained success

Ensure training occurs in brand and template use, and communicate clearly the advantages for employees and the company. Training should occur for all user levels - from basic to advanced.

Ensure that a first level support is established. Select employee ambassadors as superusers who are help desk buddies, and ensure that the rest of the organization know who they are.

Helen O'Hara
Template expert, RPS Group, UK

"

Consider a set up that is not just restricted to Microsoft Office and windows-based PCs, because for most businesses, that's not where the work and communication stops. The majority of the businesses we work with are far into the process of utilizing the cloud and are more focused on access via multiple devices because that's how people work.

"

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Key takeaways

The Definitive Guide to Template Management

Get a quick overview of the most important points as discussed in this chapter.

1 Scope and rollout

Scope out the project, and structure the template management solution to your company needs. Make a plan and gather a team to help support this.

2 Build the ideal set-up and include an implementation partner

A template management implementation partner can help the company assess types of templates required for optimal productive workflows. Consider employee access, workflows, document structure and lifecycle flows. Choose the correct efficiency features that will be the most beneficial set-up for the company.

3 People and maintaining success

Put together the right team, remembering to establish first level support which includes employee ambassadors. Know the infrastructure, and set-up the solution to scale.
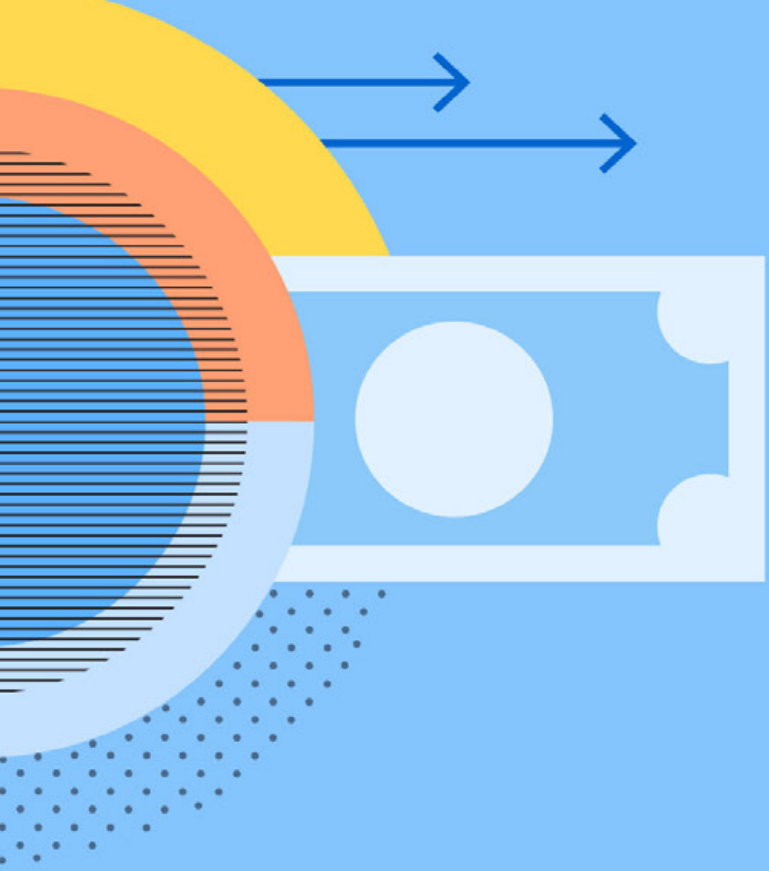
Chapter 07.

Buying document template management

Templafy

One-page overview of what this chapter covers

Buying template management is easy enough once the company has identified what they need. Here are 9 steps to tackling the purchase process.

The 9-step purchase process

Taking all the insights gained around scoping the template management features, the implementation requirements, and the needs of project team; all that is left to do is choose the best vendor and implementation partner for the company's scenario.

This chapter lays out a recommended 9-step purchase process, giving guidance for selecting the best potential vendor who fits with the business case, and presenting advice for checking vendor references along with what will need to be reviewed in order to get started.

9

Learn from a 9-step purchase process

Requirements and team: identify your requirements then assemble a team.

?

Explore recommended questions to ask a reference

Recommended questions to ask trusted sources during the vendor selection process.

!

Find out some additional considerations

Additional factors to consider: implementation and round-up, service and support, likelihood for long-term success.

☆

Read an expert opinion: Helen O'Hara, RPS Group

Get an expert opinion on what to look for in a template management vendor.

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9-step purchase process.
Steps 1 to 3

Begin with planning goals, setting a timeline, and assembling a team.

STEP 1

Write down the goals for the project

The likelihood of success is increased by putting down goals on paper, as this provides clarity around the intentions of the project.

This could include **improved productivity** and marketing and business operations **alignment**, better ROI for marketing and brand teams, **increased speed and agility** for compliance, **reduced time** needed from IT support, **future proofing** IT systems, and **replacing legacy systems**.
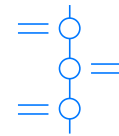
STEP 2

Plan the timeline

Next, identify the steps to take to achieve these goals. Factor in time to evolve, adapt and learn as the process may vary from the planned timeline.

Consider when to: **start the selection** process, make the **final decision**, start **implementation**, have detailed vendor presentations and demos, and see the first value results.
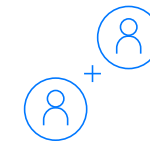
STEP 3

Assemble a team

A team should be created to help choose the solution, and also be responsible for managing it.

Stakeholders, including the **IT team**, should sign-off on all goals, requirements and potential scenarios.

Typically, a voting approach doesn't create the best decision process. All stakeholders must accept the final choice, but the decision should be driven by **marketing**, **IT** and the primary **users** of the solution.

The Definitive Guide to Template Management

Templafy

Purchase process.
Steps 4 to 6

Next, identify company needs, evaluate vendors and speak with references.

STEP 4

Identify company needs

Knowing what the company's needs are is crucial to understand before deciding on a basic or more advanced technology. Deep diving early on in the process will help identify the deeper complexities that often only arise later in the project.

For example, consider whether the company requires technology capable of harvesting **metadata** and automating parts of the workflow. And for global enterprises, it is recommended to take into consideration the need for **context-aware** technology to cater for multiple office locations and languages.

STEP 5

Evaluate potential vendors

When evaluating a vendor, use the team of internal experts in IT, marketing and business operations in the process. Explore vendor options against the company's **established criteria of needs**. Ask each vendor to **demonstrate** specific processes and features or request a free trial of the solution.

Ask tough questions: it's vital to ensure that the vendor can show that their solution features can deliver as promised, and that the technology is fully **integrable** with existing IT setups. And evaluate each vendor's offering regarding **support, implementation partners, consulting** and **training**.

STEP 6

Talk to references

Looking at references will normally seal the deal for deciding which vendor to choose. Remember to also **ask for references** from a recommended implementation partner.

Speak with others from your **network** who have experience with the vendor(s) under consideration for a **trusted review**.

If possible, find references from organizations with **similar needs/setup** to find opinions and suggestions on vendor selection. Those with similar situations will be able to suggest whether your organization will also succeed with that particular solution.

The Definitive Guide to Template Management

Templafy

Purchase process.
Steps 7 to 9

Finally, make a decision, get the implementation started, then review and optimize.

STEP 7

Make a decision

The time has come to make a final decision. Choose the vendor that can best make the project successful in line with the goals created at the beginning of the process.

While this does involve **comparing subscription costs** and **contract terms**, the revenue benefits enjoyed when the team achieve their goals are usually much more significant – so it's best to choose the solution that will be most successful.

STEP 8

Get started

You should already have a complete understanding of this part of the process, based on the initial review of the vendors.

But just in case, look into **syncing the platform** with your CRM and DAM systems, creating templates (or have the vendor help with this), **training users** in the system, **building or importing templates** (work with the vendor's enablement and consulting teams for best practice.)

Press go!
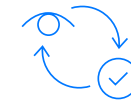
STEP 9

Review, optimize, and improve

Remember to **measure and share** the success you're having. At this starting phase of the process, **invest in the training and content needed** for success.

After three to six months, do a **check-up** and consider re-engaging with your vendor's services. Evaluate additional services that could take you to the next level.

Engage with your vendor's community to learn and share best practices. Suggest ideas for new features while you're at it.

Additional factors to consider
in the purchase process

Consider factors beyond the features and functions discussed in <u>chapter 03</u>. Here's a list of additional factors to take into account when selecting a vendor.

Implementation and scaling

- How long does it take to go live at a basic, medium, and advanced level?

- Is live or on-demand training offered by the vendor?

- What skills do employees need to use the system?

Service and support

- What is the service level agreement for technical support?

- How do you help expose users to new marketing ideas and best practices?

- How active is your online community? How quickly can answers be expected?

- Who are your key service partners? Who provides strategy and process design, change management, and technical integration support?

- Which third-party products integrate with your platform? How broad is your partner ecosystem?

Likelihood for long-term success

- What kind of ongoing costs and resources should be expected?

- Is the platform viable in the long run? Is it scalable and futureproof?

- How well does the product roadmap align with future company needs?

QUICK TIP

Remember data security! Vendors should be considered only if they can fulfill your security requirements, and answer the questions from your organization's IT security teams.

Templafy

Questions to ask during
a reference call

Useful questions to ask references in order to get a deeper understanding of their experience with a selected vendor.

Implementation & scaling

- How long does it take to learn basic functions, such as updating a template?

- How long does it take to implement functions such as brand validators?

- How is the integration between CRM and DAM systems?

- How hard is it to set up and maintain the new system?

- How long does it take to integrate, the intelligence component of dynamic templates?

- What is the experience of implementation and support?

- What is the experience from the employee perspective?

- What is the experience from the administration perspective?

- Is the end-user adoption rate satisfactory?

Success criteria & selection

- What were the key business processes and goals set for this template management project?

- How well can the system deliver on those goals?

- Who was the decision maker responsible for purchasing this solution?

- What made them choose the selected solution?

Results

- Has there been an increase in productivity?

- What is the best thing about the system? And what is the worst?

- When implementing, what costs were incurred beyond the solution price?

- Would the company buy the same solution again, or consider alternatives?

Thought leader opinion:
Helen O'Hara, RPS Group

RPS is a leading global professional services firm of 5,600 consultants and service providers. Operating in 125 countries across six continents, RPS define, design and manage projects that create shared value to a complex, urbanizing and resource-scarce world.

What should you look for in a template management vendor?

"Experience, definitely. A vendor that's experienced in working with both small and large companies is important, because there are generally differences between what's required. Vendors will have that breadth of knowledge, experience of the types of core templates that are likely to be used, and knowledge of how they're likely to be used – a global company will need a different perspective to a company of just thirty people.

Also, look for a provider that is continuously looking at improvements. So, what are the software packages that they're thinking of implementing their solution with, or incorporating with, or linking to? There are so many new software packages entering the market for various financial document management, image management systems, and so on. Look for a company that is innovative at looking for other software packages to work with.

Also, that they're going to provide ongoing support, because you're going to sometimes need access to ongoing support - not for lots of things, but knowing that there's someone there if something happens at the end of the line is really important. It gives your IT team a bit of comfort as well, knowing they've got backup if needed."

Helen O'Hara, Template expert, RPS Group, UK

Templafy

Key **takeaways**

Get a quick overview of the most important points as discussed in this chapter.

1

Plan the purchase journey well

Consider the timeline for goals, and the involvement of both the team of stakeholders and the buying committee. Select a vendor who is a good match for the organization. Be aware of the internal procurement process and company stipulations for buying software.

2

Choose an experienced vendor

Choose a vendor who is always developing improvements, and is future facing in their outlook. The vendor should have an excellent breadth of knowledge of template management and IT integrations, and offer ongoing customer and technical support throughout the process and after delivery.

3

Check the references

Ask about setting up workflows and integrations with CRM, DAM and DMS. Remember to ask about the end-user adoption rate. Think about the success criteria and business goals, and how the platform will deliver on the goals. Have references confirm project results, such as increases in productivity, and reductions in IT maintenance.

Chapter 08.

The future of template management

Templafy

One-page overview of what this chapter covers

We asked a number of experts to share their predictions for what the future has in store for template management.

Template management is expected to play a key role in the whole Enterprise Content Management ecosystem in the future - at least within Software as a Service.

There have been significant advances in technology since 2016 – the year iWRITER and Templafy both decided to make exclusive cloud-based template management technology solutions.

Today, the full potential of what the future holds for template management has yet to materialize, so we asked four leading experts in template management to share their thoughts on what will come next.

Some of the predicted themes for the future include:

- Template management and AI
- Access and working in the cloud
- Evolution of the document lifecycle
- Template management beyond enterprise

Christian Lund

Co-founder, Templafy

"In the future, I think we'll see a type of context awareness that takes the automated workflow to whole new level."

Arjen Hartog

Co-founder, iWRITER

"...in the future, we will be able to type or talk, and the correct brand of the documents will be created based upon artificial intelligence."

Jasper Voorhoeve

Co-founder, iWRITER

"'Simplify' is the magic word around template management, and in the future, I think we will simplify even more for the user."

Kim Kisbye

Head of Sales & Marketing, SkabelonDesign

"At some point, we probably won't have Microsoft Office installed on our computers any more, instead we will all be 100% working in the cloud."

Thought leader opinion:
Christian Lund, Templafy

Christian Lund is a co-founder of Templafy and has been working with template management for more than 15 years. Here he gives some of his thoughts on the future of template management.

Templafy

What do you think template management will look like in the next few years?

"In the next few years, we'll see a lot of companies transitioning from on-premise template management systems and locally installed software to SaaS cloud solutions, because of their capabilities to automatically update. Companies will also be looking at how they can enable their template management - not only in Microsoft Office and Windows-based PCs, but also anywhere else people work.

Looking a little bit further ahead, I think template management will expand the workflow of what can be done through context awareness. By being context aware, the technology platform will be able to serve up content and edit suggestions that are relevant for the user - just when they need it.

I think template management will tie together IT ecosystems in a complementary way. For example; a company that has invested in a digital signature technology can ensure it gets used by having it presented it to the user - just when they need it - through the template management interface.

Taking this further, template management will know whenever anybody is producing any type of document with the understanding of who they are, what the desired outcome is, and which phase of the creation process they are in. This kind of context awareness will take the automated workflow to a whole new level.

Christian Lund, Co-founder, Templafy

Thought leader opinion:
Christian Lund, Templafy

Templafy brings company templates, brand assets and best practice content together directly inside any office application, streamlining how users create on-brand and compliant documents, presentations and emails.

Templafy

"I think the template management system is the central place that connects the rest of the IT ecosystem, both in terms of data and content and in terms of technology. That is something I think we will see a lot more of in the future.

Another area of template management where I think we'll see change is in the way documents are engaged with by the end recipient. I think the way it will work is the user will be able to send a document into a flow that allows them (the document creator) to follow this engagement. Let's say I send my proposal to someone else. I, as the user, will know what the recipient is looking at. If the recipient has any comments, they can give them directly to me, via the flow.

This will bring a lot more life to those documents. I think template management will play a very significant role in that process because what those systems are capable of is putting together the very documents that go into that process.

Users will follow the interactions with their documents, in a sort of "afterlife" of the document creation. This will be able to show engagement gains with people who are supposed to read or interact with the documents."

"

In the future, I think we'll see a type of context awareness that takes the automated workflow to whole new level.

"

Christian Lund
Co-founder, Templafy

Templafy

Thought leader opinion:
Jasper Voorhoeve, iWRITER

Jasper Voorhoeve is a co-founder of iWRITER and has been in the market of template management for 20 years. Based on this experience, he shares his predictions for the future of template management.

iWRITER

What do you think the future of template management will look like in the next few years?

"I think the question we need to ask for the future is: Is there anything else we can do to make users love the solution?

There has been a lot of focus on user-friendly interface design for some time now, but what is it that makes the user love the interface and love the solution?

Part of the answer is that template management brings order to the chaos by simplifying processes. That is one of the most important benefits of template management - it simplifies processes, and this simplification brings scalability to a company. Scalability brings business growth, and then everyone is happy.

'Simplify' is the magic word around template management, and in the future, I think we will simplify even more for the user."

Jasper Voorhoeve, Co-founder, iWRITER

Templafy

Thought leader opinion:
Jasper Voorhoeve, iWRITER

iWRITER is a Microsoft Office Add-in for brand identity & template management trusted by more than 350,000 users worldwide. They help customers to be successful by allowing them to communicate consistent brands.

iWRITER

"This simplicity is in the user-friendly interface, in the workflows built on what is common for the worker and that integration, so it is seamlessly part of Microsoft Office.

When people can see the effects of what a solution will offer them, and how hours of work are reduced down to just a few minutes, it is very convincing - they can see that it's a huge game changer for their workday.

Right now, we are only really seeing the beginning of this in large companies and some municipalities, such as those in the Netherlands. A lot of other companies are still using complex old setups, self-made templates with VBA and macros. I think in the future, the simplicity and scalability of template management will become a generic solution that is accessible for everybody when they create a document. And people will demand it because they love the solution."

"

'Simplify' is the magic word around template management, and in the future, I think we will simplify even more for the user.

"

Jasper Voorhoeve
Co-founder, iWRITER

Templafy

Thought leader opinion:
Arjen Hartog, iWRITER

Arjen Hartog is a co-founder of iWRITER. He has been working with template management for 20 years. Here Arjen discusses the future of template management, and the hopes he has for this.

iWRITER

What do you think the future of template management will look like in the next few years?

"I see a lot of opportunity for adding things that can aid the whole document lifecycle, like approval processes and signing experiences. These could really add to the document lifecycle, and the experiences that customers are going through.

If I go even further, I think template management will enable things like artificial intelligence. It's my dream that it can! Artificial intelligence could help to fill in and to validate what people type. For example, if you have a specific tone of voice within your company, that could be put in the templates, and when you're typing, if a phrase is being used and this is not the way you should communicate with another company, other suggested phrases that are relevant to your tone of voice could be shown.

We might be able to type what we want to type in personal content, and while typing, have company branding popping up in the documents, just as it is needed."

Arjen Hartog, Co-founder, iWRITER

Templafy

Thought leader opinion:
Arjen Hartog, iWRITER

iWRITER is a Microsoft Office Add-in for brand identity & template management trusted by more than 350,000 users worldwide. They help customers to be successful by allowing them to communicate consistent brands.

iWRITER

"This sort of 'adaptive branding' could help the document creation process and mean less manual clicks from the user. In my opinion, in the future, we will be able to type or talk, and the correct brand of the documents will be created based upon artificial intelligence - whatever techniques are needed for that.

I also think governance will expand and accelerate in the coming years. I think facilitating forms will increase with external data, or intelligent data, and contextual information relevant for documents. All of this will be a part of template management and mean communication as a solution can be governed in this manner."

"

...in the future, we will be able to type or talk, and the correct brand of the documents will be created based upon artificial intelligence.

"

Arjen Hartog
Co-founder, iWRITER

Templafy

Thought leader opinion:
Kim Kisbye, SkabelonDesign

Kim Kisbye has been working in software template management for over 20 years and is an expert in the implementation of design of client-specific template solutions in the Microsoft Office Suite.

Skabelon Design

What do you think the future of template management will look like in the next few years?

"If we look at the world today, and if we look at how Office 365 is today, compared to how it was five years ago, then I think we get a pretty good hint of what will evolve.

We have only seen the start of Office 365 – we don't see a lot of users today who use the Microsoft online versions of Word, PowerPoint and Excel. At some point, that will change. We probably won't have Microsoft Office installed on our computers anymore, instead we will all be 100% working in the cloud.

It's not a crazy notion. It's bound to happen – it's the way things are moving. Some customers in the future will still need something that works on-premise for local PCs, but I think it's a given that we will all move more and more towards the cloud, and the future of template management will be based on this.

In terms of AI in template management, I think in the future we'll see an AI feature that can create documents based on an algorithm you have, that would be based on what you expect the user to do. So, the creation of documents would be based on those algorithms, and happen through them."

Kim Kisbye, Head of Sales and Marketing, SkabelonDesign

Templafy

Key **takeaways**

Get a quick overview of the most important points as discussed in this chapter.

1 Cloud abilities are only getting started

With cloud-based vendors such as Microsoft and Google developing and scaling what they offer to businesses and private individuals, we could well be doing all our work in the cloud especially with the anticipated arrival of 5G internet infrastructure.

2 Automation with context-aware intelligence

There is a lot consideration around the application of AI technology, but just as important as AI is context aware capabilities of software to assist with automating steps in the document creation process and validating document output.

3 Multi-device, multi-platform: template management on G Suite and MS Office for mobile

Access for everyone. As other document creation suites become more common, access anywhere on any standard device will be possible, SaaS based template management will ensure productivity along with brand and legal compliance.

Chapter 09.

Conclusion and Templafy's solution

Conclusion

Whether your company has 500 or 50,000 employees, is based in one big office or spread across the globe; there is a new era of template management evolving to help with every aspect of document creation. The results speak for themselves.

And that concludes this guide, which we hope has provided you with a broad range of information about template management - from where it came, to how it has evolved with governance capabilities. And how those governance capabilities lead to productivity boosts, that lead to happy employees, and a better performing company: ultimately transforming the way employees create documents today.

Template management is a rapidly evolving technology solution. It is addressing evident gaps in the document creation workflow left by the introduction of cloud technology and the rapid adoption of various ECM systems over the past decade or so. Templafy plans to hold fast at the forefront of developing the SaaS template management solutions that enterprises need to maximize productivity, governance, and make the employee workflow smarter than ever.

If you'd like to speak with a Templafy representative, please call +45 53 57 55 81 (Europe) or +1 800 291-8407 (USA) or email info@templafy.com
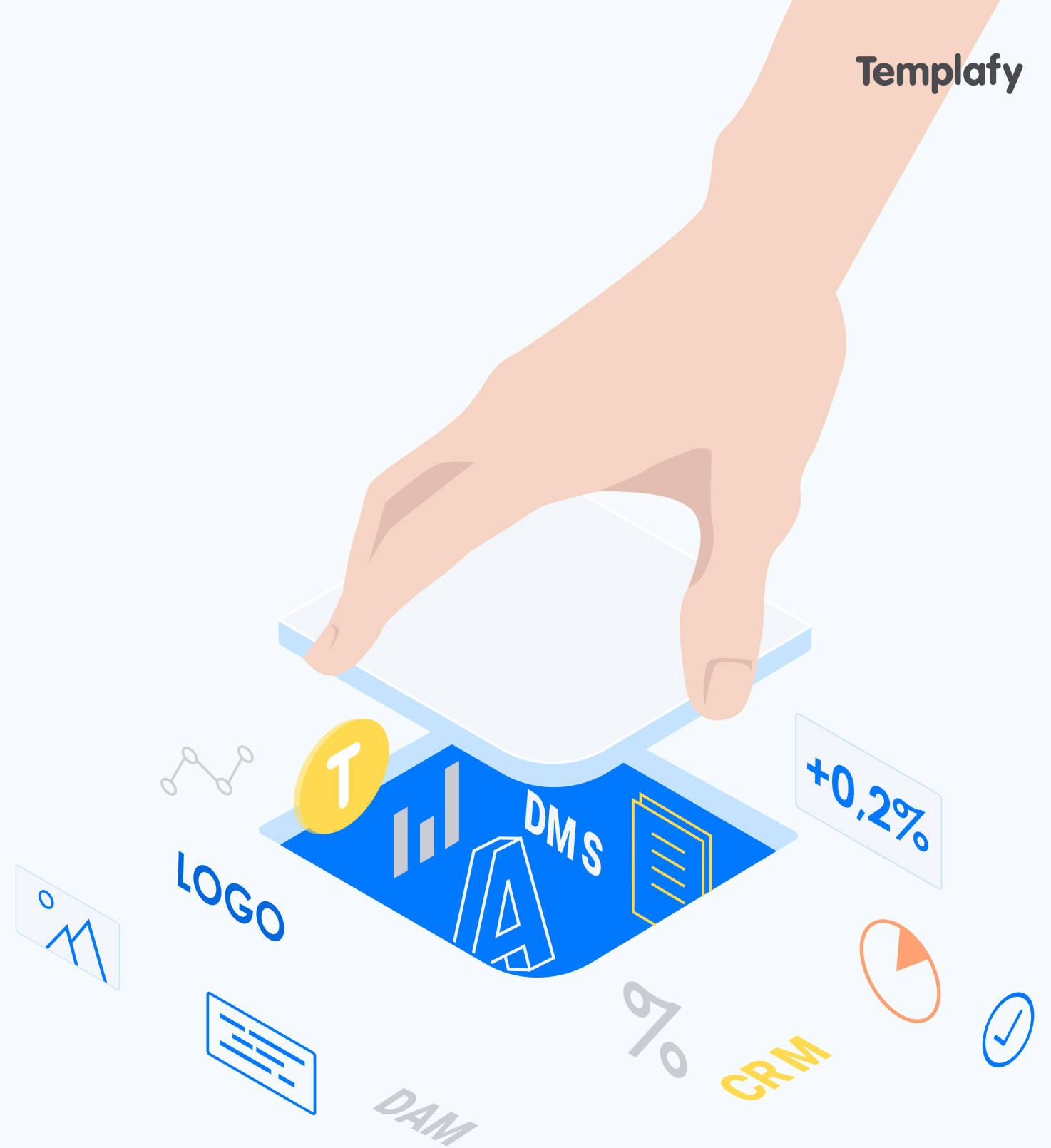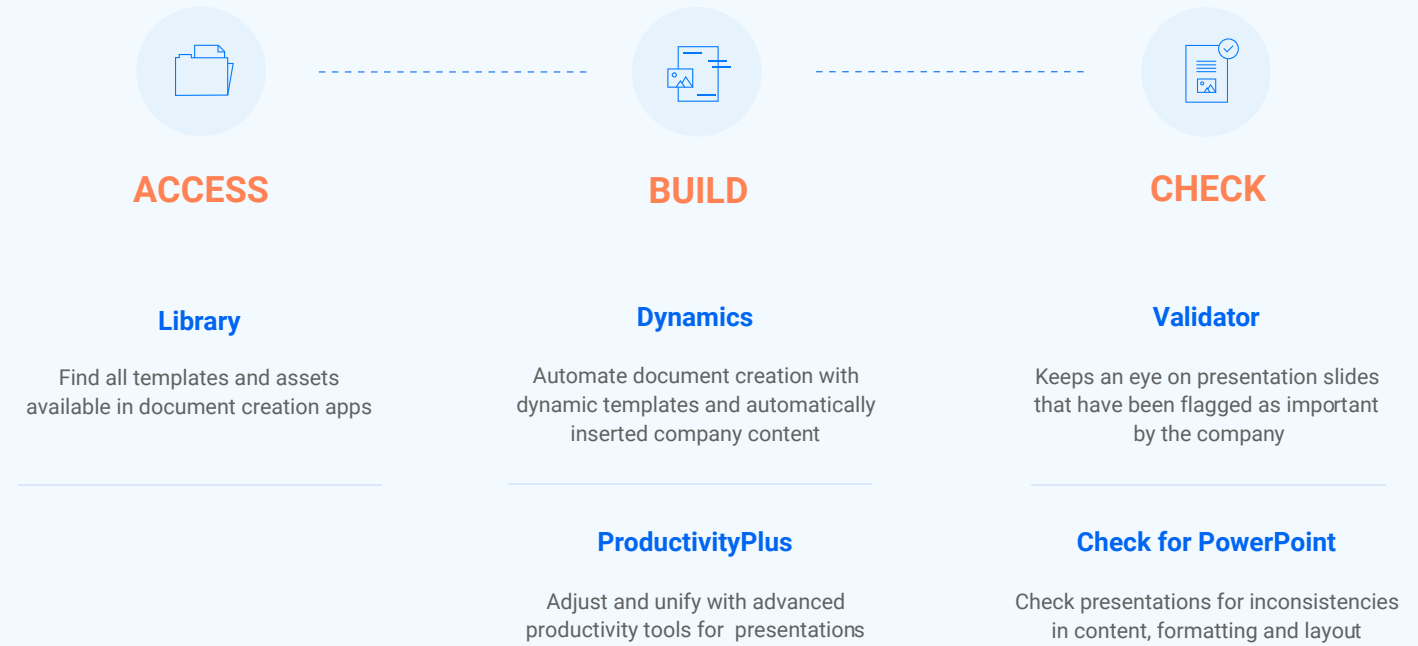
Why Templafy?

Templafy

Templafy's innovative platform changes the way employees create business documents, presentations and emails. It makes document creation workflows smarter and more efficient. And it makes managing, distributing and tracking company templates, brand assets and legal disclaimers a simple task designed for company admins – not IT.

Templafy is a SaaS solution, meaning that it's our job is to continuously innovate when it comes to our area of expertise: document creation. So you can focus on yours.

DOCUMENT CREATION PROCESS

Smart templates connect company data directly to the user

ACCESS

BUILD

CHECK

Library

Find all templates and assets available in document creation apps

Dynamics

Automate document creation with dynamic templates and automatically inserted company content

Validator

Keeps an eye on presentation slides that have been flagged as important by the company

ProductivityPlus

Adjust and unify with advanced productivity tools for presentations

Check for PowerPoint

Check presentations for inconsistencies in content, formatting and layout

EASY CONTROL WITH ADMIN

Manage, distribute and track company content without using IT resources

MANAGE   **DISTRIBUTE**   **TRACK**

ADDITIONAL FEATURES

OFFLINE MODE   EMAIL SIGNATURE MANAGER   INTEGRATIONS

FONT DISTRIBUTOR   EMAIL SIGNATURE CAMPAIGN MANAGER   ANALYTICS & REPORTING

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Find every source and reference as used throughout this guide listed here.

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The Total Economic Impact™ Of Templafy: Cost Savings And Business Benefits Enabled Enterprise-Wide Content Governance

Project Directors: Julia Fadzeyeva & Richard Cavallaro

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The Total Economic Impact™ Of Templafy: Cost Savings And Business Benefits Enabled Enterprise-Wide Content Governance

Project Directors: Julia Fadzeyeva & Richard Cavallaro

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About this guide

Special thanks to all involved who shared their valuable time to help make this guide possible.

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About Templafy

Document creation made intelligent.

Templafy is the future of managing company documents. Our platform lets users easily update and share document templates and digital assets through a user-friendly interface that doesn't require any IT expertise. With all company templates and digital assets centralized; access, updating and distribution are simple and intuitive.

Templafy's platform adds automation to document creation so employees can create company documents more easily, with more accuracy, and in a secure environment that promotes productivity.

Founded in 2014 in Copenhagen, Templafy has quickly grown to become the biggest player in SaaS template management, collecting a host of awards along the way. With proven technology and hundreds of thousands of knowledge workers using our software in many of the world's biggest enterprises (including the "Big Four"); Templafy is the market leader that has set an ambitious trajectory to continue its stellar growth fueled by pioneering technology and our vision for smart document workflows.

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The Definitive Guide to Template Management

Templafy

Learn more at www.templafy.com