

The template management guide

How to boost productivity and ensure compliance in document creation



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An introduction to template management

Have you ever re-opened a saved document from your computer to use as a starting point for a new piece of communication?

That's a template.

Template management is a system of governing a company's document ecosystem based on a range of document templates. Templates are fundamental to every company: they are the documents that carry the legitimacy and identity of that company through its logo, disclaimer, format, font etc. The average employee produces multiple documents daily, from emails to presentations, on company templates; this translates to millions of documents produced yearly by large companies.

Until recently, governing this individual-employee output was simply not possible. However, since the introduction of cloud technology, new possibilities in gaining control over a company's document ecosystem has become technically possible.

In this guide, learn about:

- [What effective template management can do for companies](#)
 - [Cloud technology](#)
 - [How cloud technology created new possibilities in enterprise governance](#)
 - [Types of templates](#)
 - [The difference between static and dynamic templates](#)
 - [Benefits of template management](#)
 - [The benefits of having optimized template management software](#)
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We hope this guide provides you all the information needed to get informed about template management and how it can change the way document ecosystems operate.

What effective template management can do

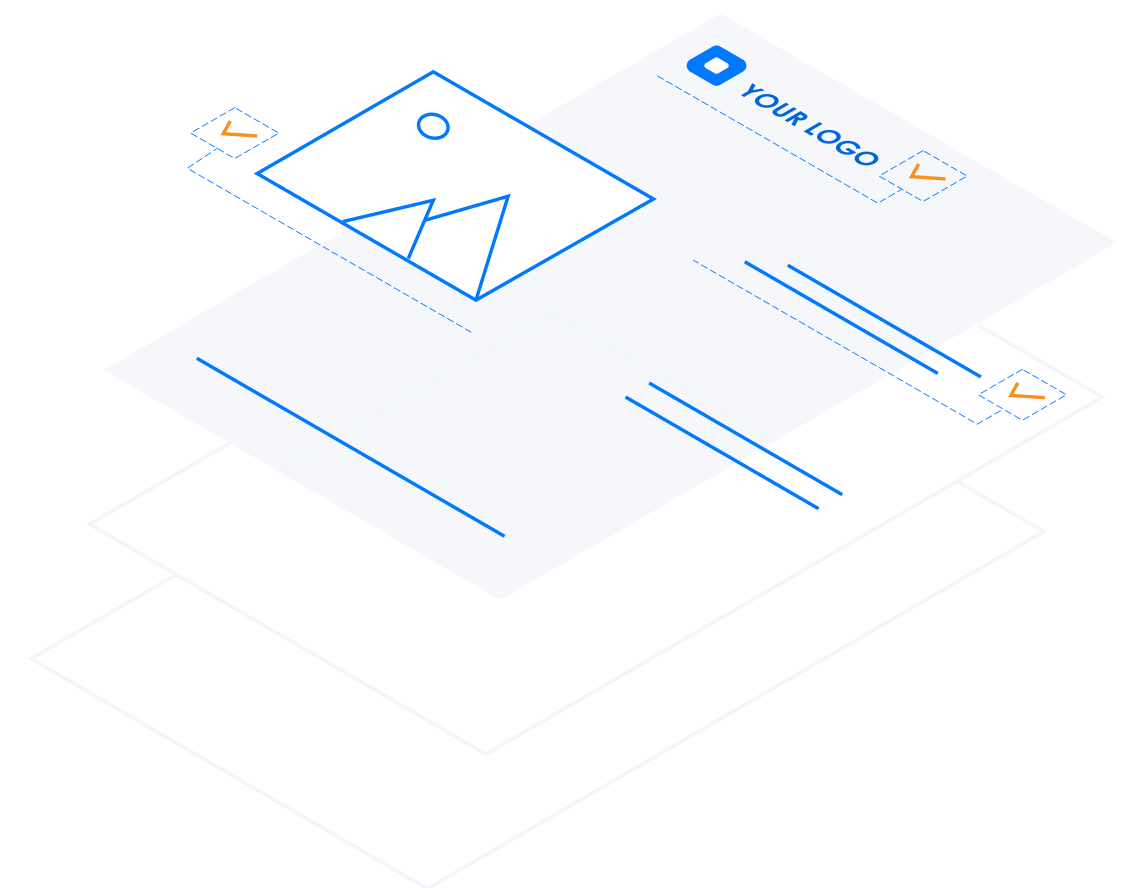
The power of templates is in good template management.

The purpose of a template management solution is to safeguard the brand and legitimize the identity of the company. What this means is that every document produced is authentic to the person creating it and to the company they represent. In order to be authentic, a company document needs to have the correct logo, font, date, address, language, and personal data of the employee creating the communication.

An effective template management solution empowers end-users to create output authentic to the context they are working in, efficiently and easily. It ensures the document creator has all the help and guidance needed to insert the content that makes an output authentic.

A template management system is designed to prevent non-quality documents being produced.

What is a non-quality document? It's one without a logo or with the wrong font – it is not authentically part of that company, or that doesn't let its communication come through because of poor design or modelling.



Types of templates:

Static

Customized templates save a lot of manual input, but an emptier, generic template has more reach across the organization. What's best: ask some staff to maintain many templates or ask 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 relate 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.

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.

Definition

What is a static template?

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

Types of templates:

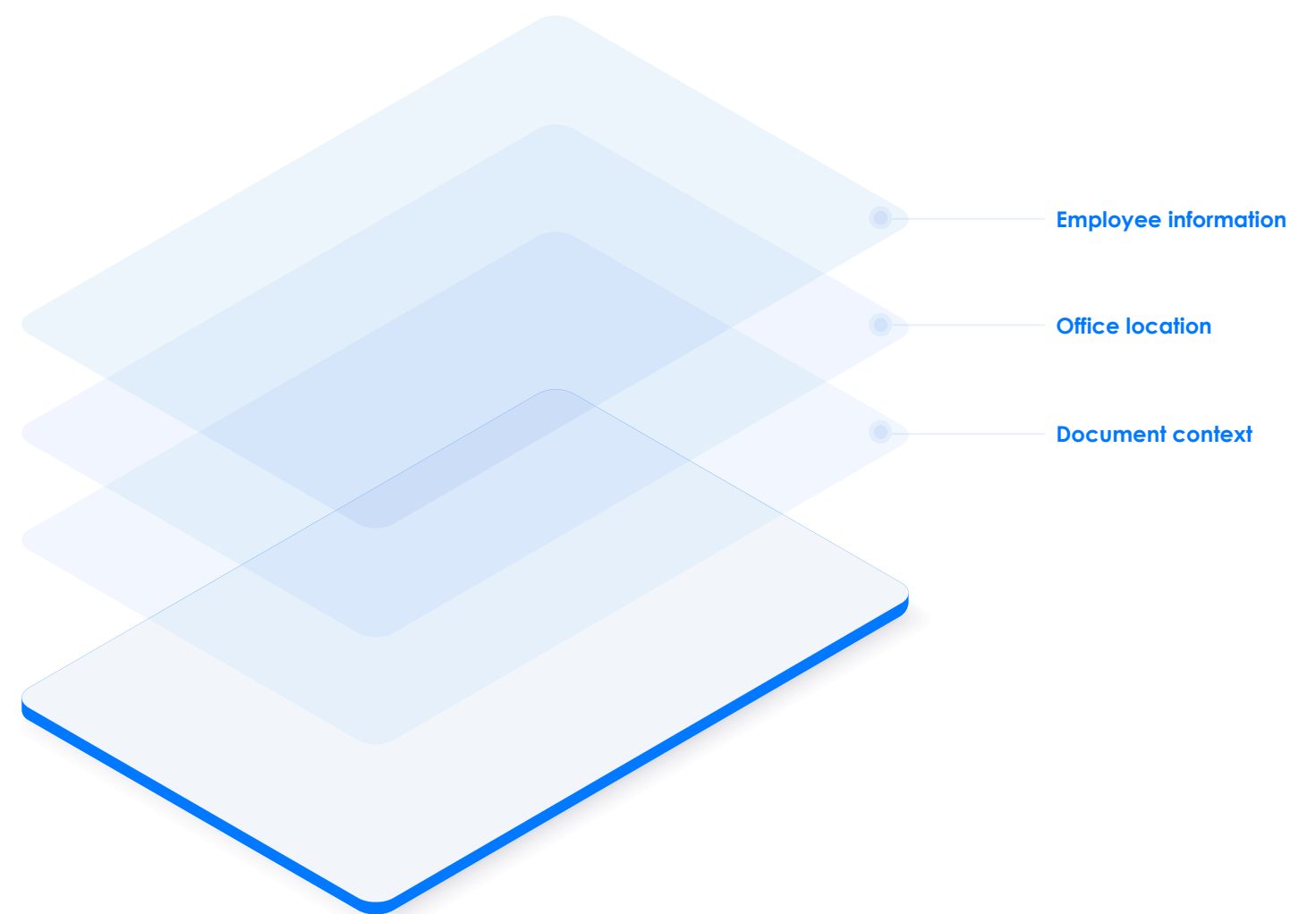
Dynamic

Auto-fill features that are linked to individual user data is what we talk about when we talk about “dynamic templates”.

Template management systems grew with technology – most particularly due to SaaS technology adoption in enterprises. Today, the most advanced template management systems mean having templates that are dynamic (i.e. not static.) Dynamic templates are “smart” in that they eliminate repetitive tasks by being able to auto-populate 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 no longer being required to monitor individual outputs – just 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.



How cloud technology enables governance over company documents

With cloud technology comes the possibility to bring correct content to the fingertips of employees.

Template management has now reached a stage where governance can reach individual employee outputs. From a tech perspective, 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.

"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

SaaS tech companies have been harnessing cloud capabilities to design and deliver technology that can improve employee workflow while giving the power of governance to the right people in the company. With SaaS template management technology, deployment is no longer a time-consuming task that must be carried out by IT. And real-time updates to templates and brand assets are controlled by those who are experts in their respective departments. Digital assets are centrally stored and real-time updates means that employees can trust that the documents, presentations or emails they're creating are using the correct, up-to-date materials.

Get an overview of how Templafy solves governance challenges

[Learn more](#)



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 felt in the wake of an optimized template management system?

Smart software setup.

IT systems with information required to populate a document are now speaking to each other through integrations.

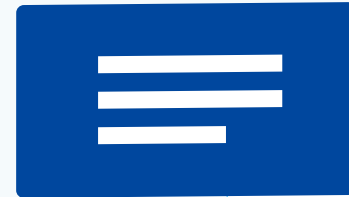
Easier access to assets.

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.

Positive employee experience.

A positive impact on the workflow, including psychologically, creates a 'psychological flow' in which a smooth workflow reduces stress by eliminating tedium.

[Learn how Templafy can integrate with your current content management infrastructure](#)



- 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



Driving productivity with improved Employee Experience

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 Csikszentmihalyi 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."*

Source: Forbes

McKinsey asked more than 5,000 executives about peak performance and what it takes to reach the feeling of 'flow' as described by Csikszentmihalyi. 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."* Source: McKinsey

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. By introducing a solution that connects the employee to the resources they need to get their work complete that objective is achieved.

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.

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."

Thought leader snapshot: Kim Kisby, SkabelonDesign

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

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 need 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 proposals quotes and stuff like that?

So, being able to address the different user groups' 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 who know where the issues are that we want to solve when we handle our templates."



Kim Kisby, Head of Sales and Marketing, Skabelon Design

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

Templafy's template management solution

The platform to perfect every aspect of business document creation.

Templafy is the smart way to manage, dynamically update, and share business document templates and brand assets throughout your organization. It's a solution that compliance and communications teams can control, IT can trust, and supports employees during every step of document creation.

Learn more at templafy.com

Our platform is customizable, so you can select modules (below) based on your company's needs.

Library

Find all templates and assets available in document creation apps.

Validator

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

Dynamics

Automate document creation with dynamic templates and automatically inserted company content and personalized content.

Check for PowerPoint

Check presentations for inconsistencies in content, formatting and layout.

ProductivityPlus

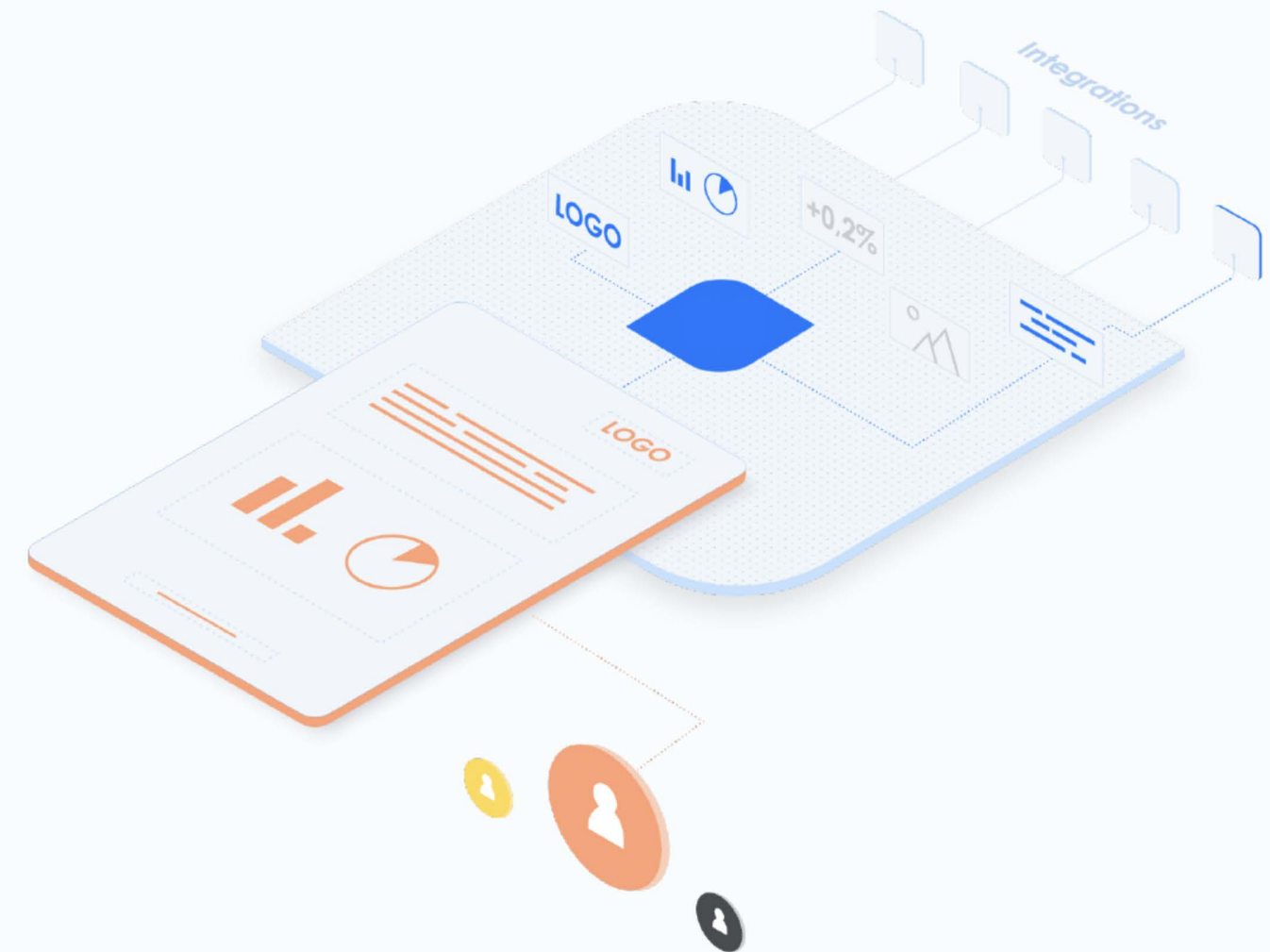
Adjust and unify with advanced productivity tools for presentations.

Font Distributor

Auto-deploy fonts based on user profiles across whole organizations.

Email Signature Manager

Centrally manage and deploy email signatures and campaigns globally.



Interested in getting started with Templafy?

[Get in touch](#)

Templafy

Learn more at templafy.com