Templafy

We enable professionals to create **better performing documents faster** through connected content

Templafy at a glance

Industry leading customers around the world, with more than 3,000,000 users
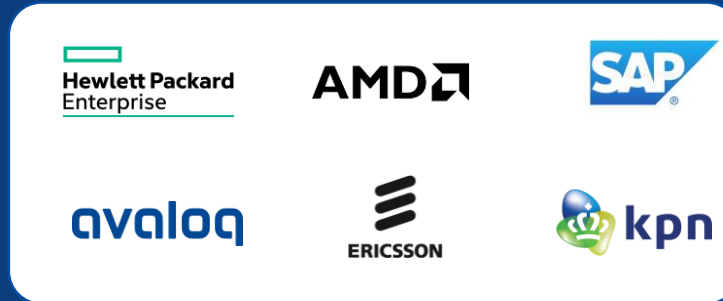
Professional services

EY · accenture · pwc

EgonZehnder · KPMG · STANTON CHASE

Finance / Insurance

AON · UBS · LiveOak Bank

Colliers · Lincoln Financial Group · TWO SIGMA

Consumer Brand

IKEA · THE HOME DEPOT · PHILIPS

adidas · PRADA · Premier League

Healthcare

Cigna · novo nordisk · AstraZeneca

MAYO CLINIC · HSS HOSPITAL FOR SPECIAL SURGERY · Abbott

Tech

Hewlett Packard Enterprise · AMD · SAP

avaloq · ERICSSON · kpn

Engineering Services and Manufacturing

SWECO · Vestas · SCANIA

ABB · Stantec · VATTENFALL

Founding story

Templafy was founded on the realization that companies are spending enormous energy, money and resources on their brand and all the content that they produce.

But they don't put nearly the same focus on the millions of documents created by employees – and the value those documents can create, or the cost when done wrong.

With that realization, Henrik and Christian created Templafy to solve document anarchy once and for all.
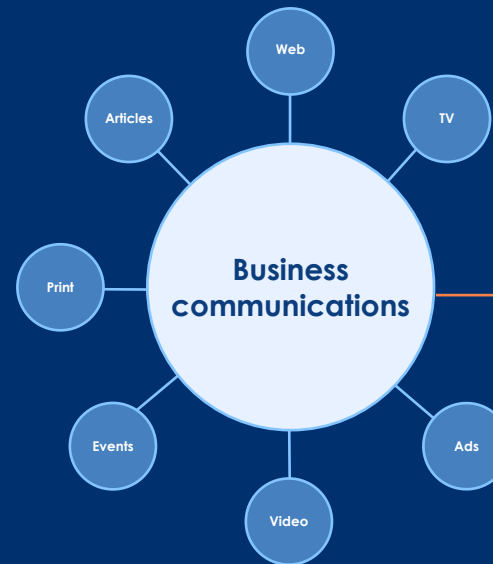
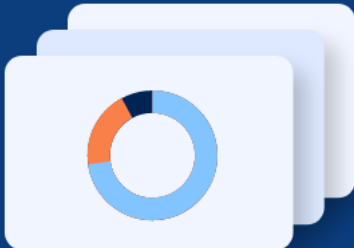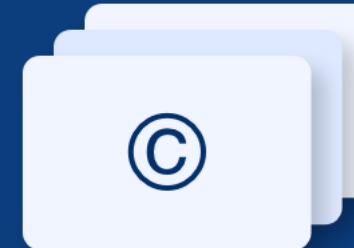# What makes up a business document?

Image

Data

Text

Logo

Legal

And more

What are the steps required to build a business document?
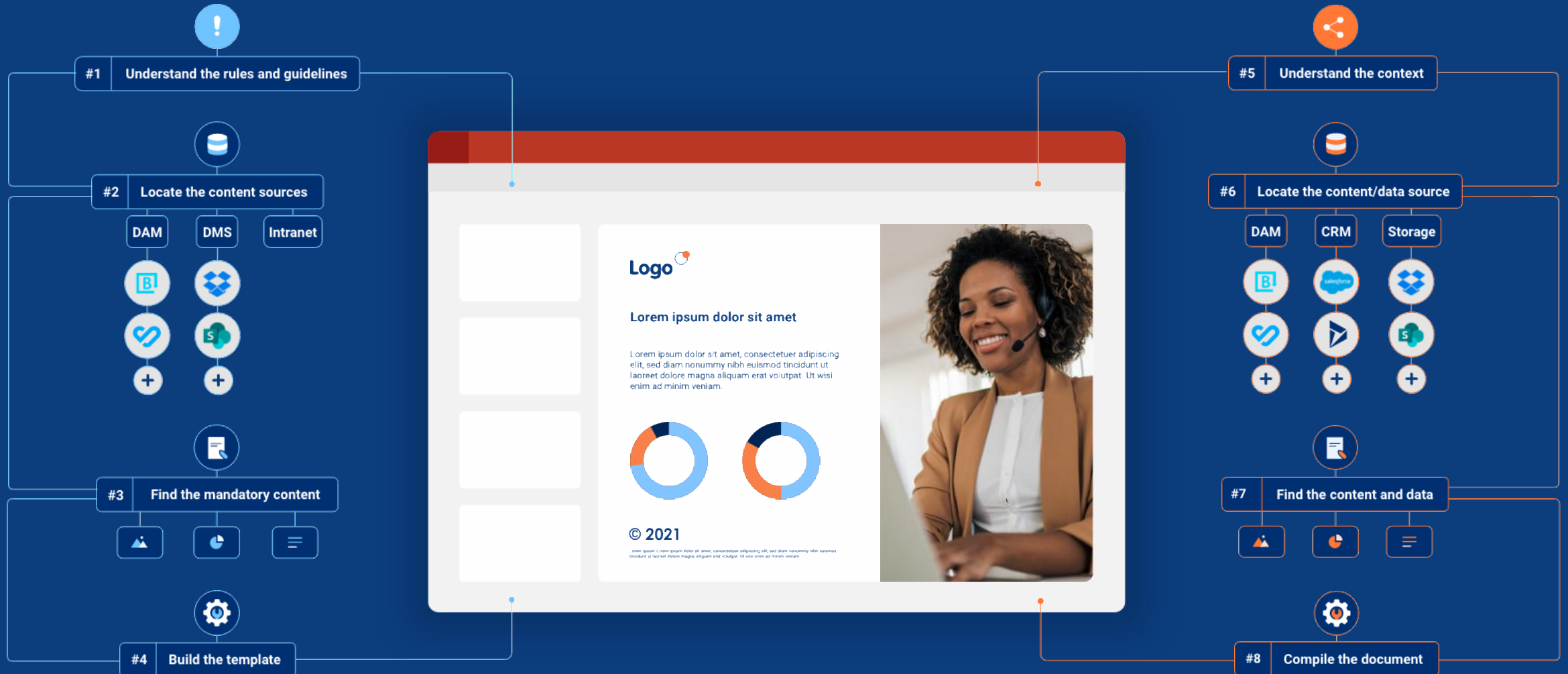
#1 Understand the rules and guidelines

#2 Locate the content sources

DAM   DMS   Intranet

#3 Find the mandatory content

#4 Build the template

#5 Understand the context

#6 Locate the content/data source

DAM   CRM   Storage

#7 Find the content and data

#8 Compile the document

Logo

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Old Logo

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© 2005

#7 Find the content and data

#6 Compile the document

#4 Build the template

Disconnected content = document anarchy

Connected content

Enterprises typically come to Templafy for these reasons

T

Marketing & Brand

Brand Activation

———

Take control of the brand in all employee created documents across your company

>

IT and Enterprise Applications

Document Governance

———

Manage templates across the enterprise, while enforcing mandatory classification and metadata

>

Business Units and Departments

Repetitive Document Creation

———

Increase performance and productivity by automating the creation of proposals, reports and more

>

Replacement of legacy systems
Ribbon tool replacement, risk reduction

Digital transformation
Office 365 migration, software consolidation

When and why organizations turn to Templafy for dynamic template management and classification
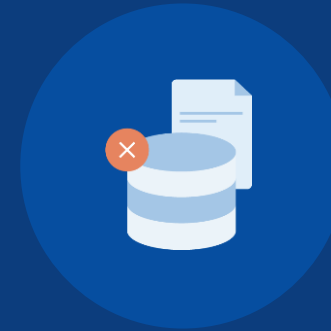
Dynamic template management

"Maintaining and updating hundreds of templates is a major challenge, and then employees still spend too much time entering and formatting headers, footers and disclaimers (often incorrectly)"

Metadata control and tracking

"It's impossible to ensure mandatory classification and use of metadata in documents across our systems"

Replacement of legacy systems

Ribbon tool replacement, risk reduction

Digital transformation

Office 365 migration, software consolidation

‹ Back to use cases

Document governance across all company documents

Problem

Inefficient template management and impossible to ensure mandatory classification and use of metadata in documents across systems

> Massive amount of time wasted updating and maintaining hundreds of individual templates

> Impossible to control metadata and track documents across the company

Solution

> Template management

> Metadata management

> Email signature management

M M
MOTT MACDONALD

"Templafy allow us to pull the metadata into a single repository, which enables us to control the metadata and report on it. We had complete blind spots with the way that the old template system used to work. Very, very problematic for the users."

Graeme Bland
Head of IT for Productivity & Project Applications, Mott Macdonald

Typical Situations

> Implementation of Microsoft Information Protection

> Implementation or replacement of Document Management solution

> Increased risk from legacy systems

50% **faster** document and presentation **creation**

Save 4 hours a week on document review

Eliminate 95% of IT team's involvement

adidas   UBS   pwc