

Templafy^T

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



Finance / Insurance



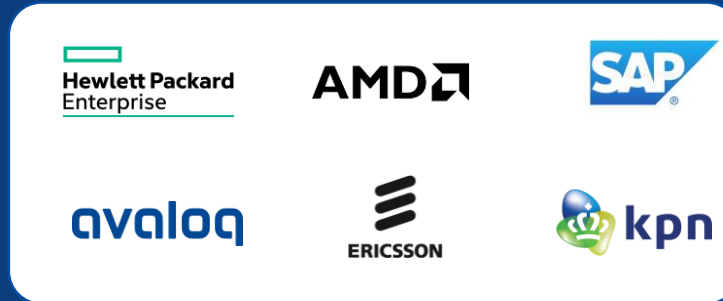
Consumer Brand



Healthcare



Tech



Engineering Services and Manufacturing



Founding story

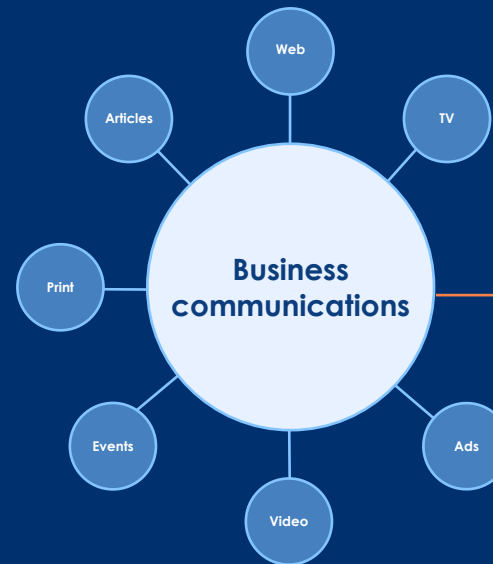
Templafy was founded on the realization that companies are spending enormous energy, money and resources on their brand and all the content that they produce.

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.

Company in control

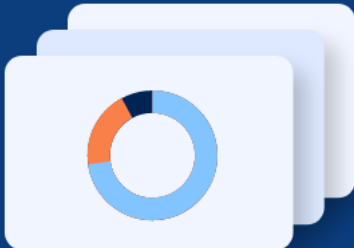
Employee in control



What makes up a business document?



Image



Data

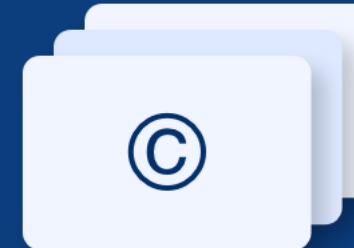
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Text

The central image shows a business document template with a red header bar. The main content area is white and contains a grid of elements: a logo, a heading, a paragraph of text, two donut charts, and a copyright notice. On the right side of the document is a large image of a woman wearing a headset and smiling. The overall design is clean and professional.



Logo

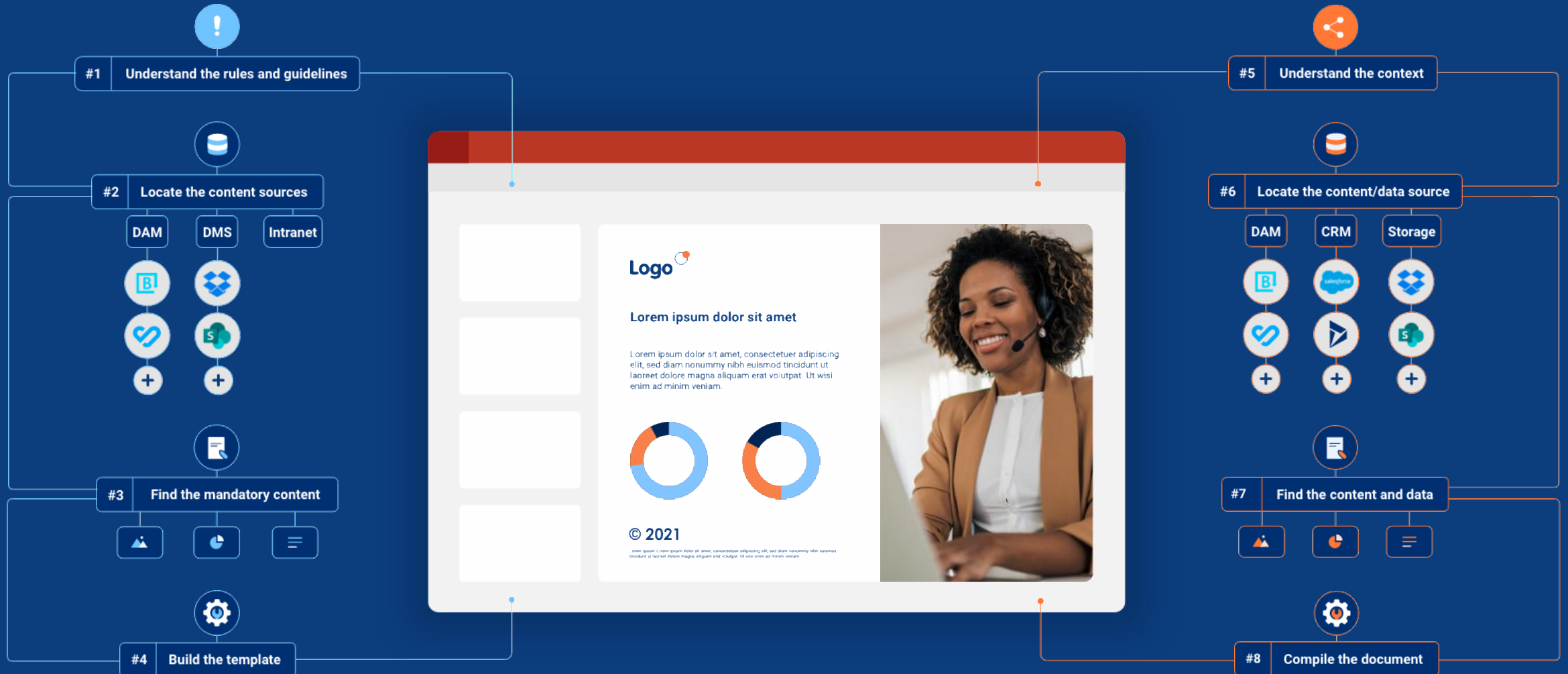


Legal



And more

What are the steps required to build a business document?





What are the steps required to build a business document?



#1 Understand the rules and guidelines



#5 Understand the context



#6 Locate the content/data source

DAM CRM Storage

A grid of icons representing various content sources: DAM (blue square with 'B'), CRM (blue cloud with 'Salesforce'), Storage (blue cloud with 'Dropbox'), a heart icon, a document icon, a green 'S' icon, and three plus signs.



#3 Find the mandatory content

A grid of three icons: a mountain range, a pie chart, and a list icon.



#6 Compile the document

A central mockup of a business document page. It features a red header bar, a white body, and a red footer. The content includes: 'Old Logo' with a triangle icon, the text 'Lorem ipsum dolor sit amet', a paragraph of Lorem Ipsum text, a circular progress chart with green, yellow, and purple segments, a photo of a smiling woman with a headset, and a copyright notice '© 2005'.



#2 Locate the content sources

DAM DMS Intranet

A grid of icons representing various content sources: DAM (blue square with 'B'), DMS (blue cloud with 'Dropbox'), Intranet (blue square with 'S'), a heart icon, a green 'S' icon, and two plus signs.



#7 Find the content and data

A grid of three icons: a mountain range, a pie chart, and a list icon.



#4 Build the template

Disconnected content = document anarchy





Connected content



The screenshot shows a presentation software interface with a slide titled "Business presentation" featuring a "Logo" and the text "Business presentation". The software includes a ribbon with tabs: Home, Insert, Draw, Design, Transitions, Animations, Slide Show, Review, View, Acrobat, and Tell me. The ribbon contains various icons for editing and design. On the right side, there is a sidebar with a search icon and a list of content elements: Text elements, Slides, Links, PDF files, Email elements, and Images. The sidebar also has a "T" icon at the top and a "Share" and "Comments" button at the top right.

- Text elements
- Slides
- Links
- PDF files
- Email elements
- Images

Enterprises typically come to Templafy for these reasons



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

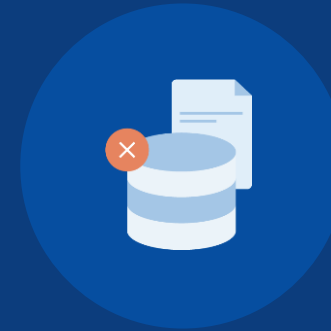


Dynamic template management

"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)"

Replacement of legacy systems

Ribbon tool replacement, risk reduction



Metadata control and tracking

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

Digital transformation

Office 365 migration, software consolidation

Document governance across all company documents

Content Connected

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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



"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



[← Back to use cases](#)