

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

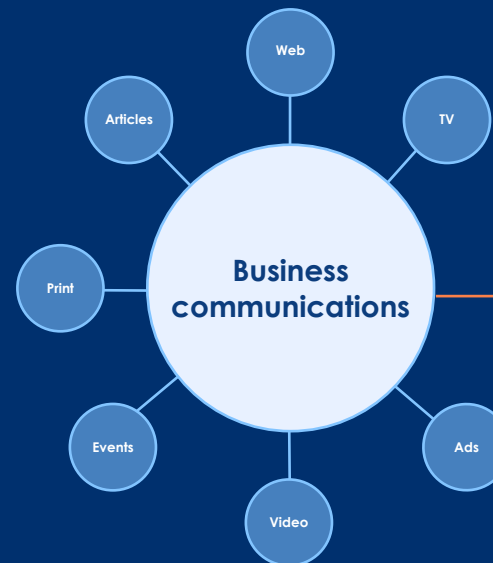
Templafy was founded on the realization that companies are spending enormous energy, money and resources on their brand and all the content that they produce.

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

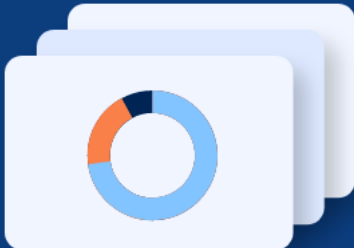
Employee in control



What makes up a business document?



Image



Data

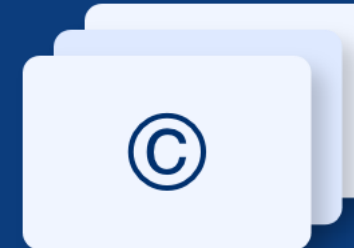
Stack of text cards containing placeholder text: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam.

Text

The central image shows a business document layout with a red header bar. The main content area is white and contains a grid of elements: a logo, a title 'Lorem ipsum dolor sit amet', a paragraph of placeholder text, two donut charts, a copyright notice '© 2021', and a large image of a woman on the right side. The layout is surrounded by a grid of empty rectangular boxes, suggesting a flexible design.



Logo

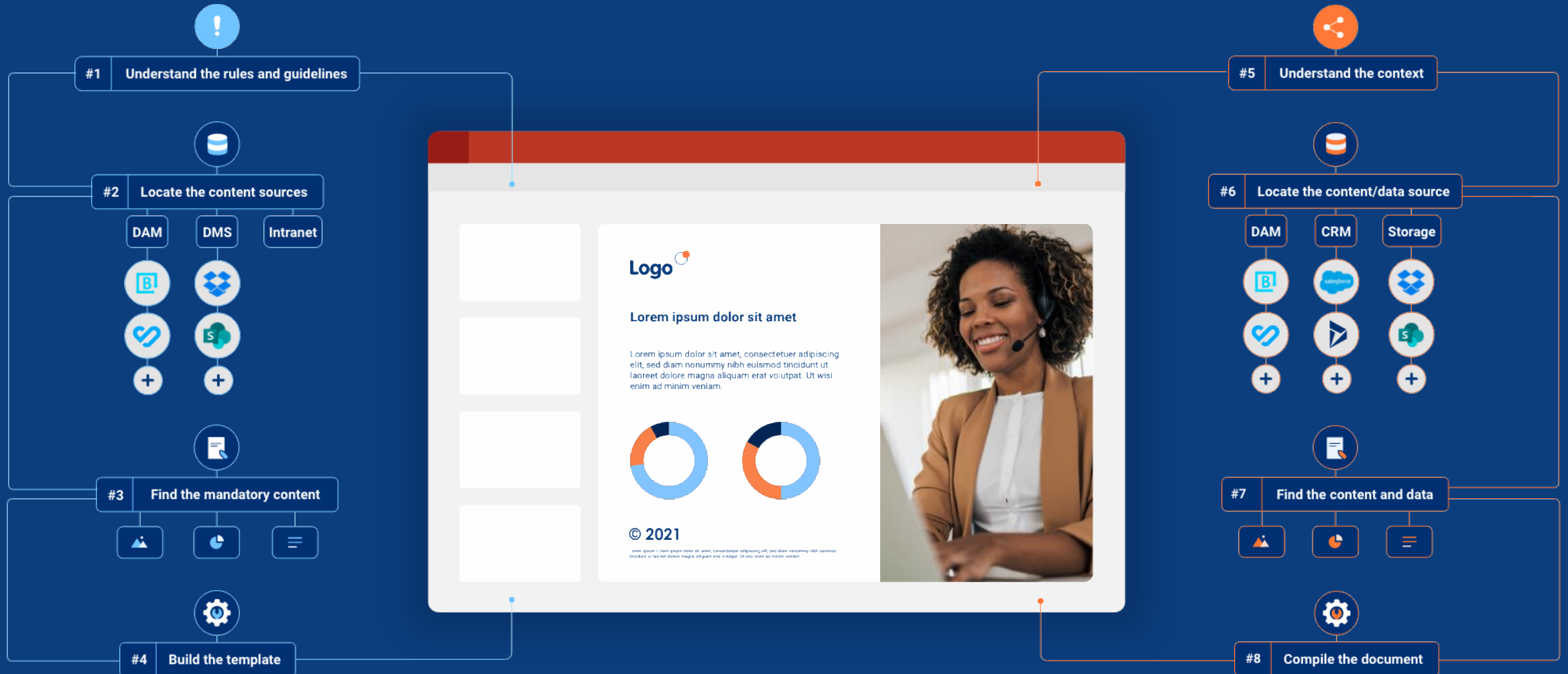


Legal



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



#2 Locate the content sources

DAM DMS Intranet



#3 Find the mandatory content



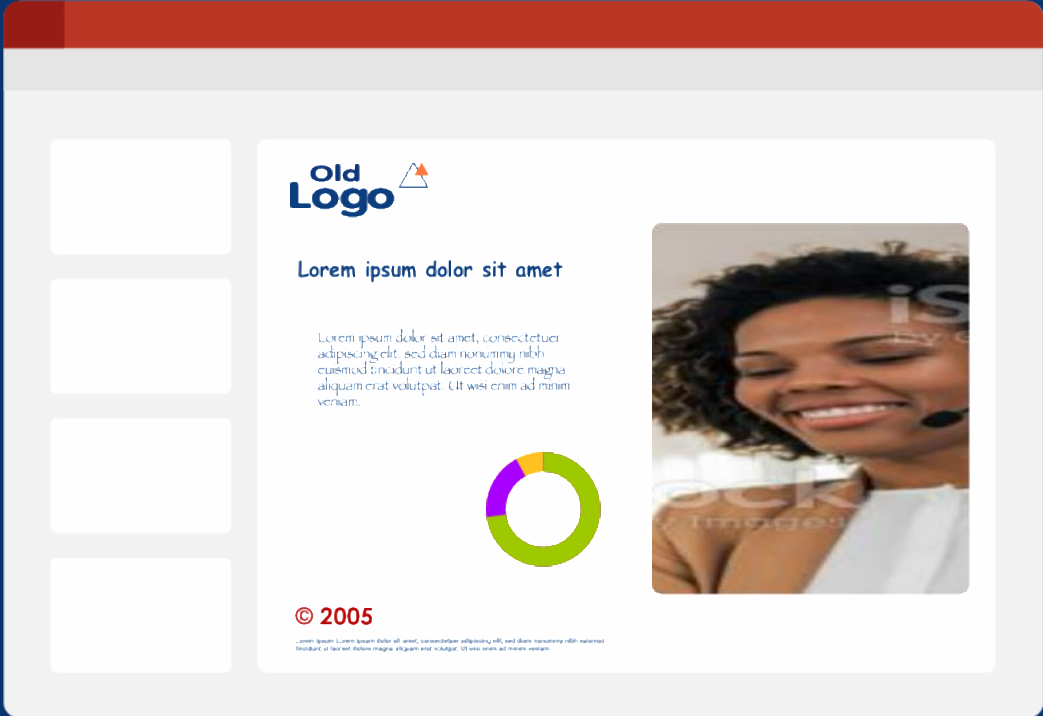
#7 Find the content and data



#6 Compile the document



#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 like Home, Insert, Draw, Design, Transitions, Animations, Slide Show, Review, View, and Acrobat. The sidebar on the right displays a "T" icon and categories for Slides, Slide elements, and Images, with a list of content thumbnails including a logo, a person with a tablet, a bar chart, and a Gantt chart.

- 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 repetitive document creation



Proposal automation

"We need a way to make our simple proposals self-service for employees"



Contract automation

"It's tedious and time consuming to create the same contracts over and over again, and mistakes cost us money"



Complex document automation

"Creating complex documents manually wastes time and often results in poor quality"

Efficient and compliant repetitive document creation

Content Connected

T

Problem

Loss of employee productivity due to inefficient document workflows

- > Employees spend too much time creating documents and fiddling with formatting and layout
- > The quality and compliance of employee produces content is below standard

Solution

- > Content distribution
- > Document compilation
- > Document formatting
- > Document sharing and tracking



"Users working to put together customer-facing documents and presentations could do so 50% faster with Templafy."

- Forrester

Typical Situations

- > Productivity analysis
- > Best practice analysis
- > 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](#)