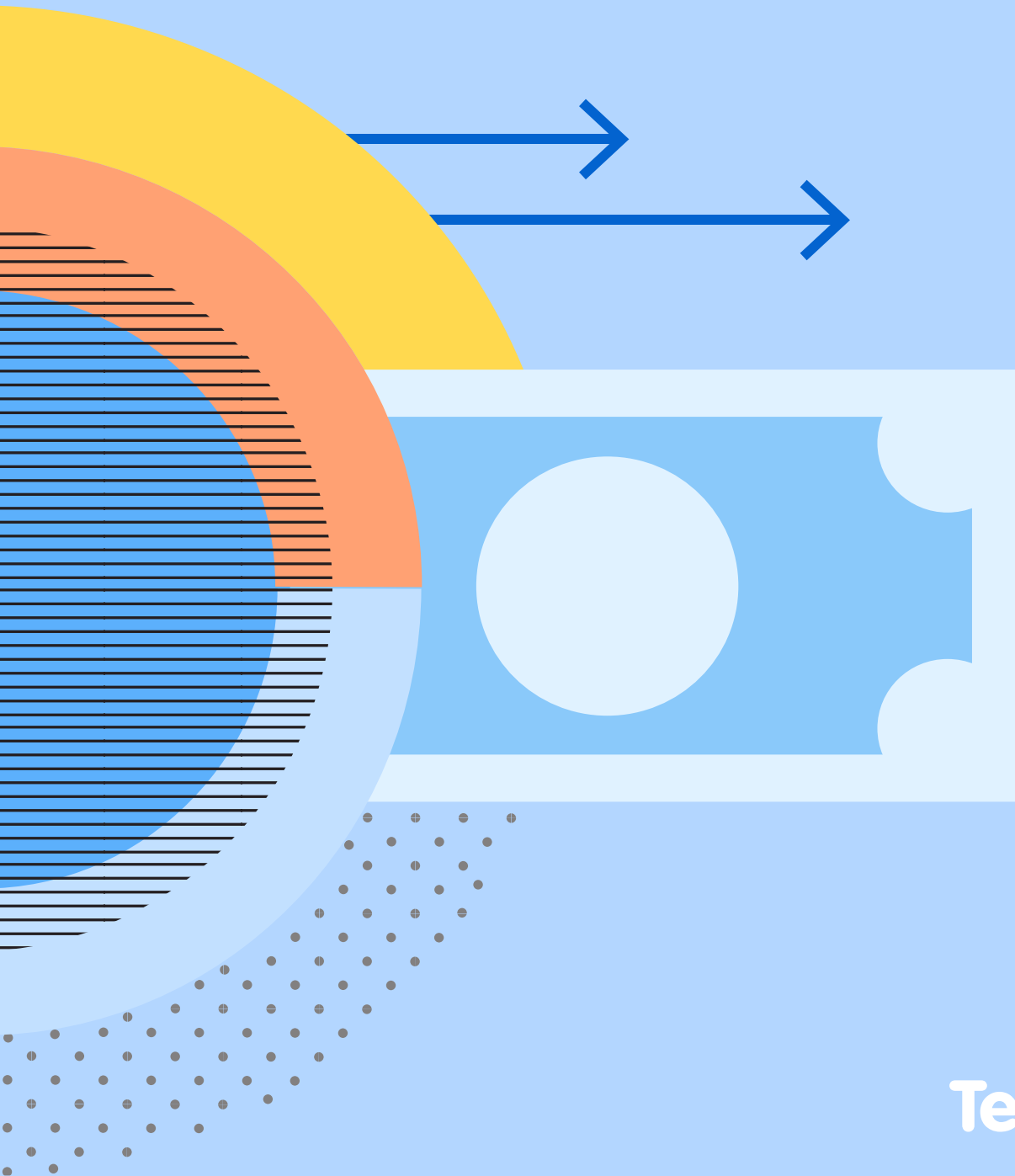


The ROI of template management

Your guide to how much your company can save with Templafy



Templafy^T

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Your guide to how much your company can save with Templafy

An overview of what this guide 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 company to invest in one.

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 Templafy’s template management platform.



Learn about the core business case

Save time and money, and 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 to help an executive team see the value of investing in template management.

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ROI over time of template management

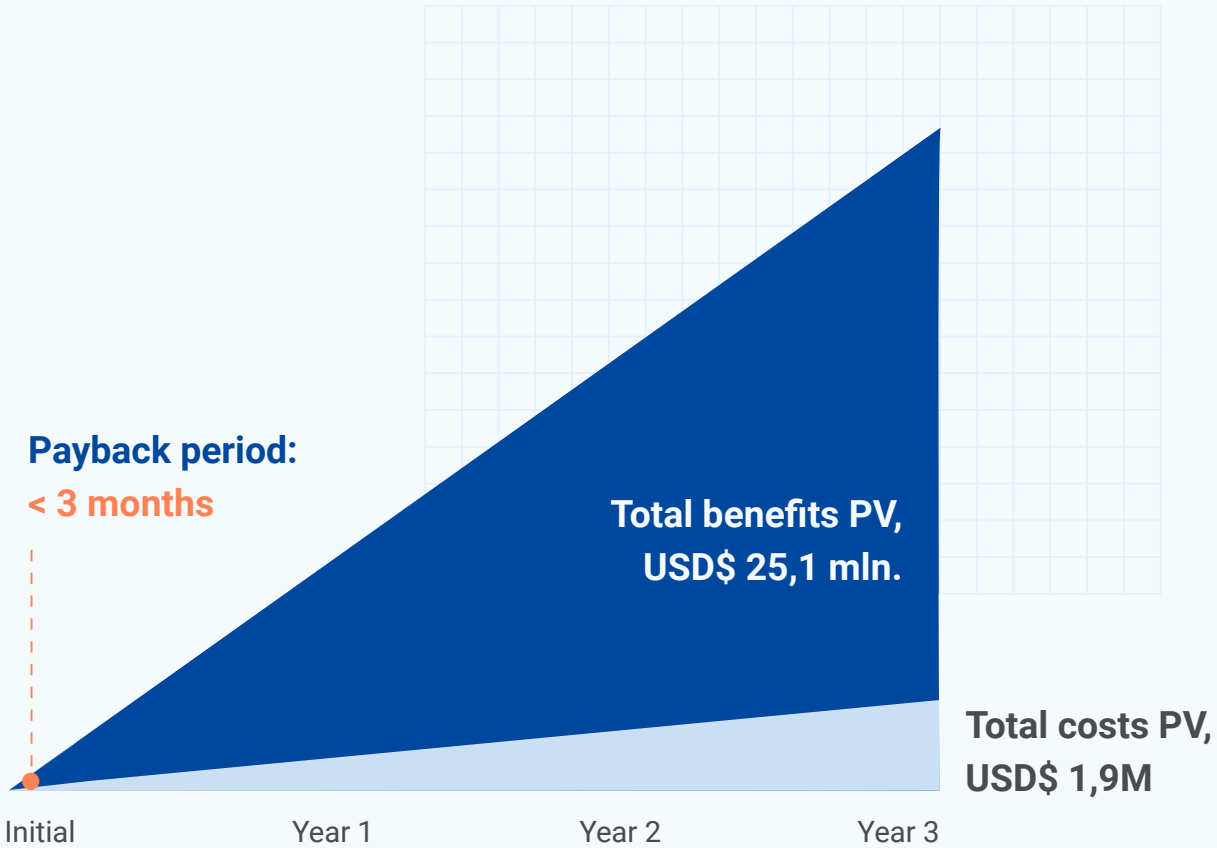
Forrester research demonstrated that by deploying template management, companies achieved a significant productivity uplift for end-users, branding teams and the IT teams, by simplifying the process for updating and using the organizations' templates and branding assets.

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 **\$25 million of benefits**. Rolling out the template management platform facilitated the content creation and review process for 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 as a direct result of Templafy's platform.



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

Summary of productivity, document control, validation and compliance

The table shows the total benefits across the areas listed, as well as present values. Over three years, the composite organization expects risk-adjusted total benefits to give a present value of more than \$25 million.

QUANTIFIED BENEFIT DATA AS APPLIED TO THE COMPOSITE

BENEFIT	YEAR 1	YEAR 2	YEAR 3	TOTAL	PRESENT VALUE
Productivity savings for end users	\$ 9, 604, 000	\$ 10, 084, 200	\$ 10, 588, 410	\$ 30, 276, 610	\$ 25, 020, 188
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)	\$ 9, 620, 545	\$ 10, 100, 745	\$ 10, 604, 955	\$ 30, 326, 246	\$ 25, 061, 334

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

Core business case for template management

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

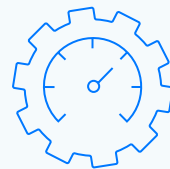
The **four main benefits** to document template and content management are shown on the right.

Other key considerations include: 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?

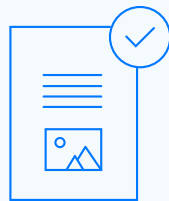
The core business case will look into how template management can help the company **save time and money**, ensure **compliance** in documents produced, measure using **analytics**, optimize based on **results**, and how to **futureproof** the IT infrastructure.



1. Save time and money.



2. Measure and optimize.



3. Ensure document compliance.



4. Futureproof IT infrastructure.

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 based 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

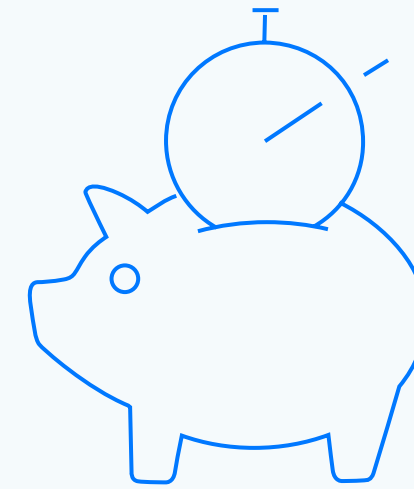
Making sure that employees have the right templates, documents and content when they need it, right there in the applications they work in. This means that everyone can work faster and the output is up-to-date and reliable.

2. Automation

By investing in 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 time spent on tasks, with creating a report going from taking hours to taking just a few minutes.

Without automation of dynamic templates, there are a lot of overheads due to needing to hire people to do the work manually.



Core business case:

2. Measure and optimize

Analytics and tracking content capabilities mean workflows can now be optimized, and brand investments can be measured in several different 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

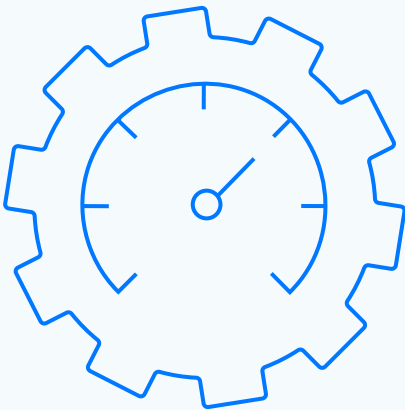
The ability to run tests such as this content vs. that content, and this template vs. that template helps companies learn what works over time, which ultimately leads them to better optimization and more revenue.

3. Productivity impact

When business operations employees have access to tried and tested compliant content faster than ever before, documents are produced with greater efficiency. Admins and managers 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.



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 means creating an authentic document happens faster and more efficiently.
- Trust and insights**

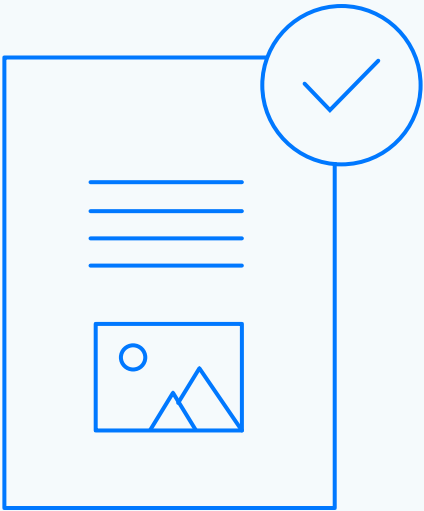
A secure workflow that can be trusted by everyone, where company administrators have control over brand and legal assets. The template management system provides data on assets and template usage.

- 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, enabling workflow best practices.



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Core business case:

4. Futureproof IT infrastructure

SaaS evergreen solutions enable scalable infrastructure. Adding an evergreen template management system provides both a challenge and solution.

The challenge

Servicing business enablement along with demands from communications can be challenging for IT departments. Adding the complexity of migration to the cloud, scalability of IT services, selection of SaaS vendors and ensuring secure remote access for employees across a global organization increases the challenge.

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 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 are 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



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.
”

Your guide to how much your company can save with Templafy

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.**



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.



Homework:

Calculating and estimating costs

Calculating and estimating the 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.

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 document process should 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.



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 as a solution to 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. This will help the organization to see the business case as a priority right now.

The ability to deliver a compelling business case for template management will depend on the strength of the argument and its ability to resolve the main business challenges and priorities of the specific organization. Regardless of which executive needs to be convinced, ensure you **manage expectations** about the time 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 and a cost center, not a **revenue-driving opportunity**.

Many executives are loath 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 in presenting 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, where 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.



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.



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. The answer definitely involves template management, because it is a major part of what most employees are using in their daily worklife.

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.



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 perform updates 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 one location to change any content and template. This reduces 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 “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.



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 a 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
Accessing templates or document assets requires multiple steps.	<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"/>
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"/>
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"/>
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"/>
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"/>
Employees spend a lot of time creating documents/presentations.	<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"/>
The company is involved in a merger/ acquisition.	<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"/>
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"/>
The company is moving to the cloud.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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 efficiency 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, the business case for investing in template management is 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.

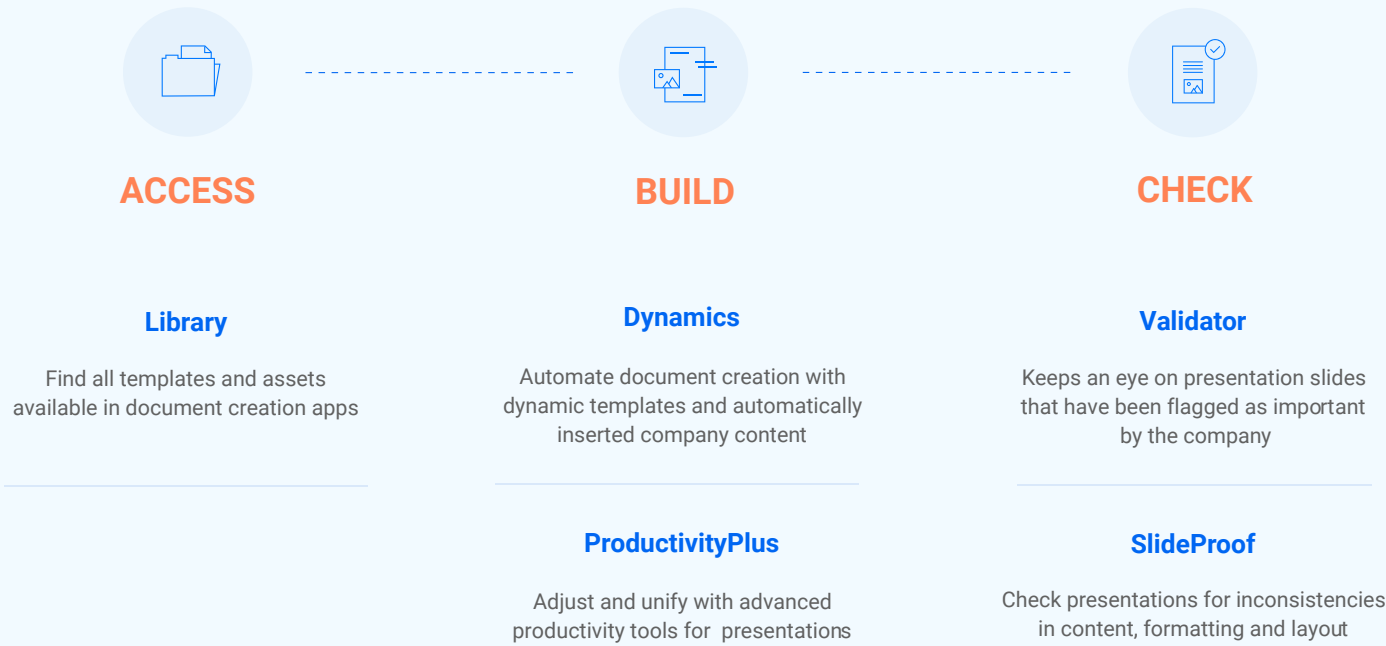
Why Templafy?

The results show that organizations implementing Templafy experienced \$25.1 million in benefits and a 1,239% ROI over a three-year period according to Forrester research.

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.

DOCUMENT CREATION PROCESS

Smart templates connect company data directly to the user



EASY CONTROL WITH ADMIN

Manage, distribute and track company content without using IT resources

MANAGE ----- **DISTRIBUTE** ----- **TRACK**

ADDITIONAL FEATURES

OFFLINE MODE

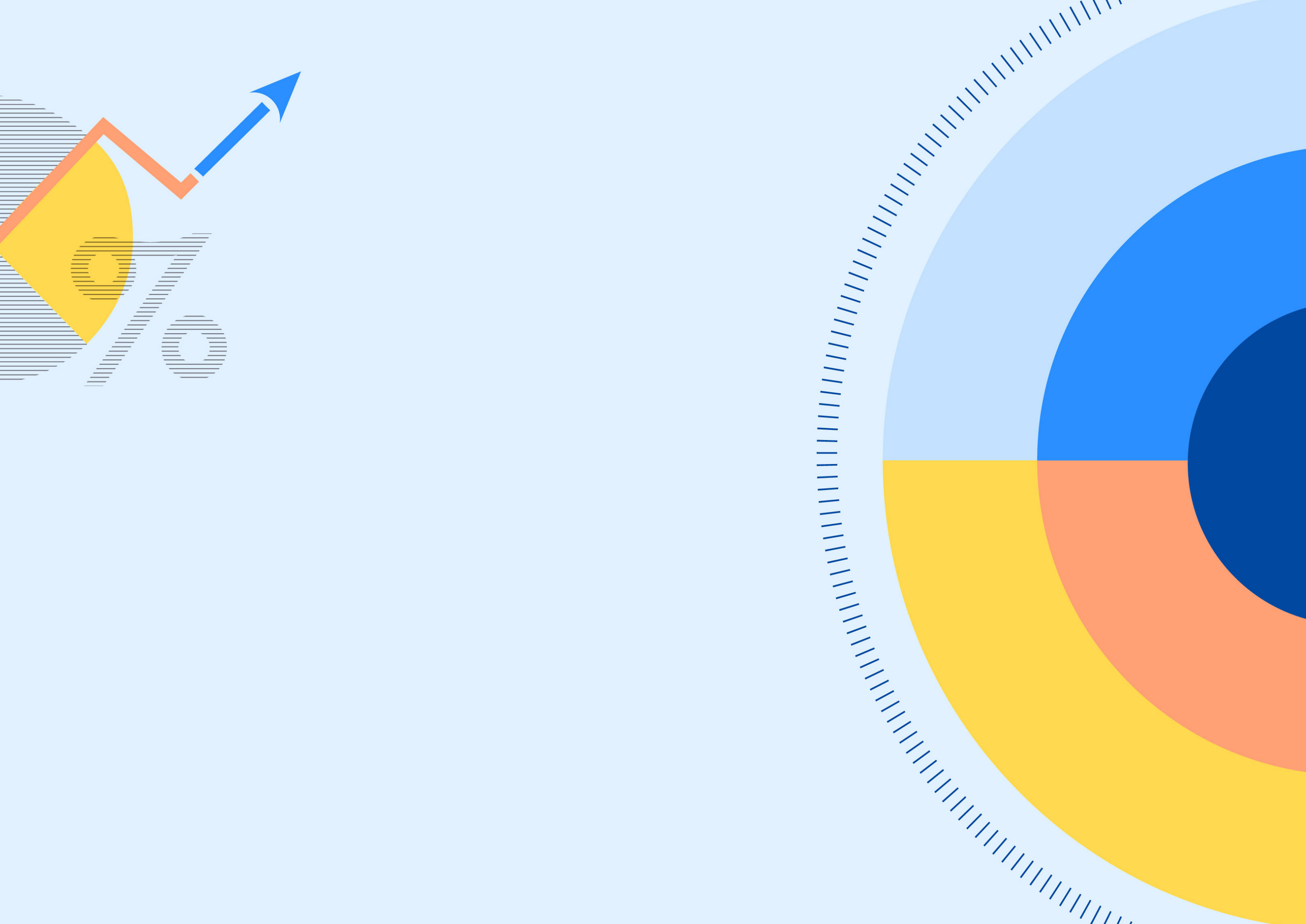
FONT DISTRIBUTOR

EMAIL SIGNATURE MANAGER

EMAIL SIGNATURE CAMPAIGN MANAGER

INTEGRATIONS

ANALYTICS & REPORTING





Templafy^T

Learn more at www.templafy.com