



NAVACORD UPDATE

Templafy Content Enablement Platform

A Wholistic Brand Experience

Templafy^T

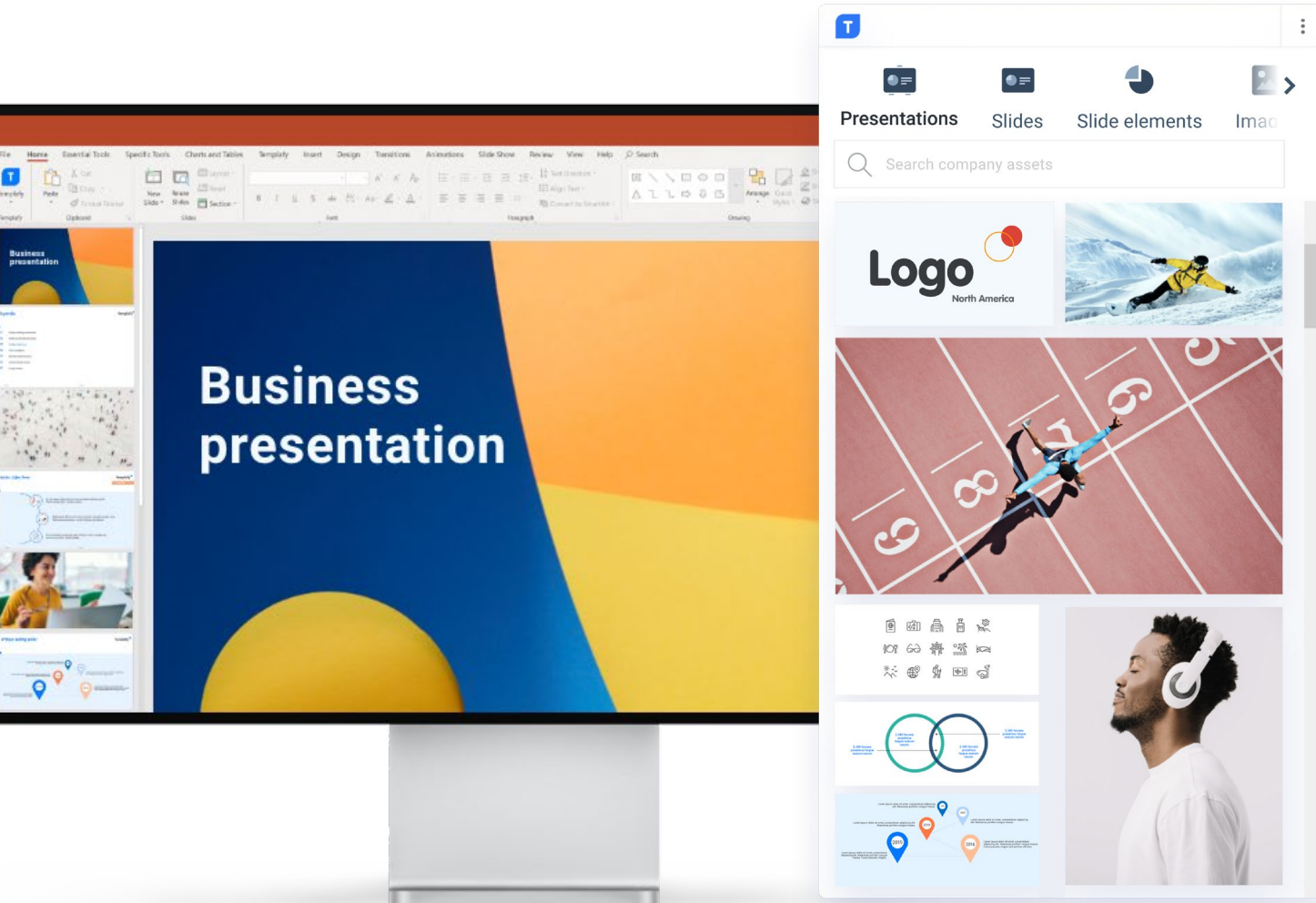
Introducing Templafy

Templafy's content enablement platform aligns workforces and enables employees to *effortlessly create on-brand, high-performing business content faster.*



Templafy in Microsoft Office 365

Approved templates and assets directly inside the Microsoft Office tools employees already use every day



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Templates: presentations, documents, spreadsheets, and email signatures

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Content: slides and text elements with approved brand voice

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Assets: approved images pulled directly from SharePoint

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Guidelines: Fonts, colors, logos, icons, and more

Key Benefits of Templafy

Brand Governance

- Brand approved asset libraries
- Email signatures

Increased Productivity

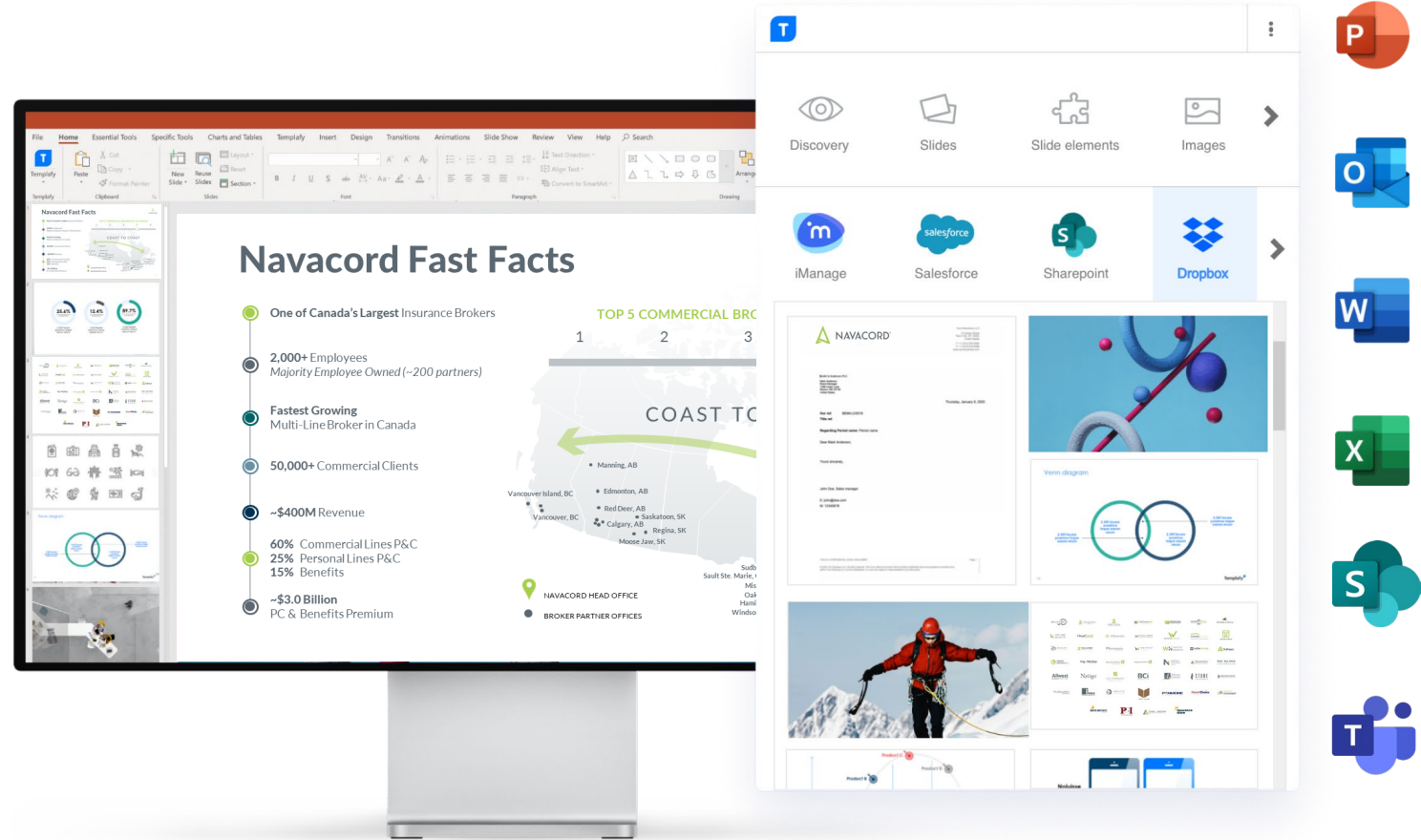
- Automated document and content creation
- Dynamic content within Microsoft Office

Legal Compliance

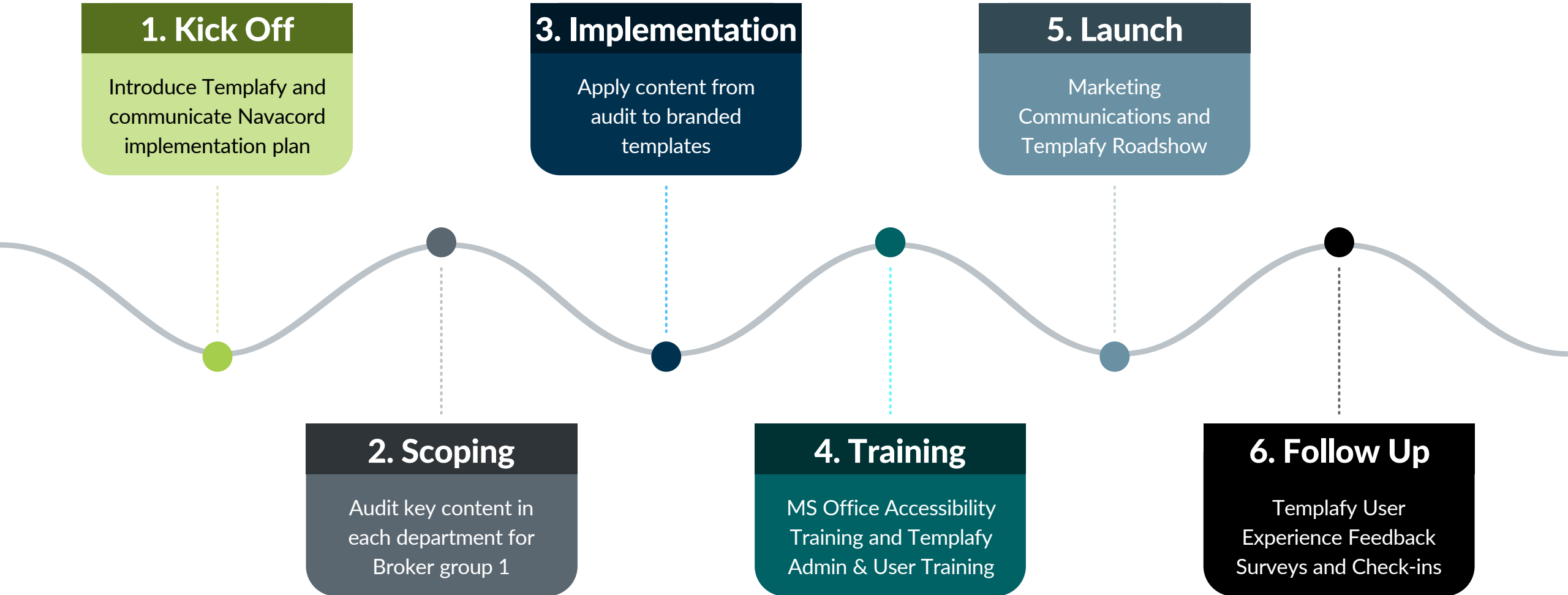
- Language: English and French text elements
- AODA accessibility requirements
- Legal and brand compliance

Global Distribution

- Instant and secure enterprise updates
- Advanced search and tagging features



Templafy Implementation Plan



Phased Approach: Broker Group 1



Sample Launch Content

How much content will be available on launch day?

STEP 1 Phased approach

STEP 2 Big Bang

All of the content from the “phased approach”, Plus the following;



Word
Blank
Memo
Letter and Fax
Meeting Minute

Word - Divisions/departments
Sales: quotes, tenders, contracts, etc.
Marketing & Comms: case stories, newsletters, press releases, brochures, etc
Legal: NDAs, due diligence, data processing agreement, engagement letter, etc.
Finance: financial reporting, invoices, etc.



PowerPoint
16:9
4:3
Corporate presentation

PowerPoint - Divisions/departments
Corporate presentation
Sales: product presentation, elevator pitch, pricing presentation, etc.
Marketing & Comms: posters, social media plans, market plan, marketing analysis, reports, etc.
Legal: legal watch report, etc.
Finance: financial reporting, etc.



Excel
Blank with corporate colors and font
Gantt chart
Expense report
Schedules

Excel - Divisions/departments
Sales: revenue forecast, price calculator, new client form, etc.
Marketing & Comms: marketing planners, communication planning spreadsheets, etc.
Finance: ROI calculator, billing tracker, budget cost plan, project risk analysis

Next Steps

Navacord Content Audit By Department

Allison will meet with the chosen Champions in each department to coordinate auditing the standard, most used content for their teams.

Departments:

- Corporate
- Human Resources
- Digital
- Marketing
- Legal
- Finance
- Learning & Development
- Account Teams
- Sales



1. Review email
2. Identify a Champions for your department and inform Marketing via [Champion sign-up form](#)
3. Marketing to set up meeting with Champions for Templafy Kick Off
4. Champions to lead and organize content audit for their teams