



Skabelon  
Design

# Transitioning is tough!

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DEG<sup>★</sup>

Document Excellence Group

# MS Office is a car for the masses



# It can go from A to B



# Adjusted to your needs it can do anything



Once you have the needs in place  
you can optimise the details



Too simple or too complex  
will give you a hard time driving the thing



What if:

...all users accepted and understood legal styles?

What if:  
...documents were  
considered a central tool?



What if:

...the organisations had a document strategy?




Documents convert  
information into  
action

Kevin Craine, author  
“Designing a document strategy”


## **FINANCIAL BACKING**

Show me  
the money!



## **ORGANISATIONAL STRUCTURE**

A winning team  
More than a dept.



## **GOVERNANCE STRUCTURE**

Everyone's  
responsibility



# The industry in the World, who gets the most per hour spent inside MS Word



Lawyer



We have all  
reasons to  
make the time  
spent in MS  
Word efficient



## **ADOPTION INCENTIVES**

Training  
In doc guidance

## **TOOLS CREATION**

The template  
Added functionality

## **ADOPTION GOVERNANCE**

Print disable  
Save disable

# The winning team

2%

Understands the business

Word competent

Innovative

Non-risk averse

Even with a winning team  
and organisational support  
Transitioning is *still* tough!



# LÓÓK OUT FOR

New colours/styles (DEG styles)

New brand (and elements)

New MS Office suite

New vendor

Multiple vendors

New requests for content

New integration

New toolset

Do we have to adjust our templates?

Can you test if these are ok?

Will our templates be better when using your product?

Can we onboard your toolset with no template adjustments?

How fast can we do this?

I know we agreed on, but we would now like to adjust... is this possible

Can we use old and new tools/integrations at the same time?

What is the minimal template adjustments that we would need?

Can we update metadata on old as well as new documents using your toolset?



# POST TRANSITION

Bad practise is still bad practise

Template users will still get frustrated

New styling is never fully adopted

True value from the new design/tools  
is not fully added/implemented

# And this is how the story goes

We would like to update our styles – we are not happy with them, and have not been for nine years (!)

Huge ribbon with tons of options, nobody knows what they really do

Competitors styles in core templates (!)

We would like to reuse all our content, but we do not wish to edit anything

Screen flickering for 8-10 seconds for inserting a landscape page (homegrown tools)

MS Archaeology

The background features the word 'DELEG' in large, semi-transparent white letters. A five-pointed star is positioned to the right of the 'G'.

How do we ensure  
better transitioning?

Word templates are **core to your business**, treat them as such

Accept “**best practise**” and spend time with your colleagues to adjust templates accordingly

Get **World-class training** in place for your colleagues

Accept that **all change might require adjustments** to core templates

Assign a  
**“template  
change  
manager”**

Set a **dedicated  
(winning) team**  
containing  
end-users

Get **help on  
productivity via  
tools** where  
needed  
(shortcuts/  
ribbon buttons/  
copy-paste  
assistants)

**Be agile in the  
“tools” area.**  
Not everything  
needs to be  
optimised using  
3. party tools,  
but if something  
looks to be  
“troublesome”  
to the users, it  
most likely will  
be.



# Key take aways

Finding a balance  
between design and  
usability

Proper launch  
planning  
involving relevant  
stakeholders

Think copy/paste  
scenario

(Text and tables)

Training / instructions

(a never-ending  
process)

Find that  
'winning team'

Get or win buy-in

There is no easy way!

Test test test

Avoid too many  
custom features

Use generic  
tools/add-ins

Thank you



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