

Identifying Templates

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Wondering where to get started with Creative Automation? Unsure what deliverables would be helpful templates for your Stakeholders? Here are a few ideas to think about when identifying the best items to templatize.

Commonly Templated Materials

- Business cards
- Event-related promotions
- Social media graphics
- Calendars
- Web banners and ads
- Internal announcements

Using Data to Make Decisions

Lytho Workflow reporting is a great way to help identify potential design candidates for templatizing. Think about the following data points and questions to determine the best starting point for your team.

- Do you currently segment your data in a way to help you identify potential templates?
 - Do you have a request form for quick updates? You can report on the projects that have been created via a particular request form
 - Do you have an “Update” request form or project template?
 - Do you have a “New Project” or “Previous Project” custom field?
 - Tag for “Existing” or “Update” “Revision”
 - Do you use the word “Template” in the names of your projects, tasks, or proofs?
- Do you have recurring projects?
 - Annual, quarterly, monthly updates?
 - Evergreen items that just need tweaks
- How will you report on your templating ROI?
 - Overall project duration
 - # of team members involved
 - # of hours/LOE of project

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