

# Identify 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.

## Creating Effective Design Templates

**Simplicity is the name of the templating game.** While designing individual documents offers ample freedom for customization, creating templates for widespread use demands a streamlined approach. Trim unnecessary elements, and avoid complex nested paragraph styles.

**Think about the range of applications your stakeholders may have.** Consider the diverse applications your stakeholders may have. For instance, if your header text typically fits one line, anticipate scenarios where your stakeholders might need two. Ensure that your text frames are sized to accommodate various content lengths.

**Repetition, repetition, repetition.** Identify styles that recur throughout your templates and those likely to be accessed by stakeholders. Utilize Character Styles, Paragraph Styles, and Color Swatches strategically. In the realm of templates, a fundamental guideline is that any frequently used text formatting should be a Character or Paragraph Style. Specifically within Tempo, defining styles becomes essential for any text formatting intended for end-user customization.

## Commonly templated materials

- Business cards
- Event-related promotions
- Social media graphics
- Calendars
- Web Banners and Ads

## 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/project LOE (level of effort)

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