

CASE STUDY

Streamlined Template & Document Management for Efficient Cross-Collaboration



ABOUT

The Stroke Association is the only charity in the UK providing lifelong support for all stroke survivors and their families. They provide tailored support to stroke survivors, fund vital scientific research, and campaign to secure the best care and support for everyone affected by stroke.



www.stroke.org.uk



500+ employees



Non-Profit Organization

CHALLENGES

The Stroke Association has multiple departments that need to send letters and emails. Some emails must be sent from team email accounts rather than individuals. In addition, they have a large number of templates for certain entities, which can be overwhelming and hard to manage. Templates that require custom formatting, such as HTML, rely on plugins, workflows, and macros to generate. Those processes are time-consuming and complicated, requiring IT support for any updates.

SOLUTION

During their 2022 Supporter system upgrade, the Stroke Association implemented DocumentsCorePack (DCP) via a third-party partner. Now, as they upgrade their Beneficiary system to the same platform, they are gaining deeper insights into DCP, enabling them to refine document template management and enhance efficiency across both systems.

01 ▶ Streamlined Template Management



Creating and updating templates became significantly faster with DocumentsCorePack compared to the outdated CRM mail merge function. Now Stroke Association can empower a broader range of users, not just the IT team, to manage and edit templates, streamlining the process and reducing bottlenecks.

02 ▶ Seamless Document Management & Automation Across Environments



DocumentsCorePack makes it incredibly easy to copy templates between different environments, ensuring consistency and reducing manual effort. Additionally, it supports HTML content, allowing the users to format text for emails and letters without relying on macros, workflows, or plugins - making document automation more straightforward than ever.

03 ▶ Simplified Organization & One-Click Efficiency



With DocumentsCorePack, users can categorize and group templates for easy navigation. This is essential, especially when dealing with entities that have 50+ templates, as it saves valuable time. One-Click-Actions further enhance efficiency by allowing teams to generate emails from a shared team email account with a single click, providing a seamless, user-friendly experience.



CONCLUSION

By implementing DocumentsCorePack, the Stroke Association has transformed the way it manages templates and document generation across departments. What was once a time-consuming, IT-dependent process is now streamlined and accessible to a broader range of users. With faster template creation, seamless cross-environment management, and intuitive organization, teams can focus on their core mission rather than struggling with outdated workflows.

With DocumentsCorePack, the Stroke Association has gained a powerful, flexible, and user-friendly solution that not only saves time but also enhances collaboration and efficiency across their organization.

Are you ready to revolutionize the way you handle your documents too?



START YOUR 14-DAYS FREE TRIAL!

All features and support included

“ We are continuously exploring the capabilities of DocumentsCorePack and discovering its full potential. Already, it is proving to be a powerful solution for streamlining and consolidating many of our existing processes for generating letters and emails. By bringing everything into one centralized, easy-to-use tool, DocumentsCorePack enhances accessibility and efficiency across our CRM systems. This not only simplifies workflows but also ensures that all staff can seamlessly create and manage documents, ultimately improving productivity across the organization. ”

Carla McCabe, Business System Developer