



## Case Study: Document & Email Assembly Automation Platform

### *Centrally-managed content, standardised outputs, and rapid document creation*

#### Executive Summary

Across multiple SMEs, critical business documents were being assembled manually from old files, inboxes, and personal folders. Staff copied wording from previous documents, reused outdated text, and produced inconsistent outputs that varied by individual. The issue was the absence of content governance rather than writing quality.

This case study shows how a simple, centrally-managed content library and lightweight automation created consistency, reduced risk, and delivered professional documents in minutes.

#### 1. Context: Critical business documents were slow, inconsistent, and manually assembled

Across multiple SMEs, staff were producing:

- quotations
- order acknowledgements
- legal commentary
- technical letters
- customer emails
- multi-section Word documents

The process was entirely manual:

- Users copied text from old documents
- Content varied between individuals
- Out-of-date wording was routinely reused
- Formatting drifted over time
- Email content was inconsistent
- Quality depended on who wrote it and how rushed they were

This created operational risk, legal exposure, and a lack of professional consistency.

#### 2. Diagnostic Insight: The problem wasn't writing, it was content governance

I recognised that:

- Everyone was reinventing the wheel
- No one knew which version of a paragraph was "the right one"
- Content lived in personal folders, inboxes, and old documents
- There was no central ownership
- The business had no way to enforce consistency

The real issue was **content sprawl**, rather than user behaviour.

My solution reframed the entire process:

**Centralise the content. Standardise the templates. Automate the assembly.**

### **3. Solution: A VBA-driven document assembly platform for Word and Outlook**

I built a reusable automation system consisting of:

#### **A. A curated content library**

- Stored on a **network share or SharePoint**
- Organised into folders representing document sections
- Owned and maintained by a designated content owner
- Ensuring every user always accessed the **latest approved text**

#### **B. A VBA form-based interface**

When opened in Word or Outlook, the tool displayed:

- **Left panel:** folder structure (sections)
- **Right panel:** files within the selected folder

Selecting a file inserted its content directly into:

- the active Word document, or
- the active Outlook email

#### **C. Intelligent behaviour based on file type**

- **Word documents (.doc/.docx):** inserted as structured content
- **Text snippets:** inserted inline into emails
- **PDFs:** automatically attached to the email

#### **D. Advanced Word template integration**

The Word version supported:

- standardised formatting
- auto-numbered headings and sub-sections
- self-building table of contents
- repeating footer fields populated from a form on page one
- consistent corporate style across all outputs

This turned complex documents into **modular, self-assembling deliverables**.

### **4. Outcome: High-quality, repeatable documents produced in minutes**

The platform delivered:

- **Massive time savings** for staff
- **Consistent, professional documents** across the business
- **Elimination of outdated or incorrect text**
- **Reduced legal and commercial risk**
- **Faster response times to customers**
- **Centralised content governance**
- **Repeatable, high-quality outputs regardless of who produced them**
- **A single source of truth** for all standard wording

The system became a core operational tool, and in some businesses has remained in use for **over 20 years**.

**5. The Future**

The basic tools are pretty robust and once in-place require minimal intervention, however, there are opportunities to improve upon them.

MS Office modern integrations, use of COM add-ins or the new Office Scripts.

Use of AI to generate and review curated content, such technology could check for consistency or impact when making changes to one text.

This is a strong example of where clever AI tools were not needed to make a substantial difference, but may be used to enhance the solution.

**Why This Case Matters for Datum Clients**

This project demonstrates how small, well-targeted interventions can remove hidden operating-model constraints:

|                            |                                                                           |
|----------------------------|---------------------------------------------------------------------------|
| Governance-First Thinking  | Establishing a single source of truth for all standard wording.           |
| Process Ownership          | Assigning clear responsibility for maintaining approved content.          |
| Consistency and Control    | Eliminating drift, outdated text, and individual variation.               |
| Capability Building        | Enabling any user to produce professional documents quickly and reliably. |
| Simplicity Over Complexity | Solving a long-standing problem without new systems or licences.          |

For SMEs, this case shows how improving content governance strengthens commercial, legal, and operational confidence, and how lightweight automation can deliver lasting value without disrupting existing workflows.