



Microsoft Word Templates Webinar

July 7th 2025



Welcome

The webinar will begin at 2pm

Your microphone and camera will be automatically disabled, but if you have questions, please use the Q&A option at the top of your screen.



Today's Speakers

James Earl,
Digital Transformation Manager

James has been with Heliocentrix for the last 3 years and works with clients to develop bespoke web applications, websites, low-code apps, and power solutions that help companies achieve more with less by fully leveraging digital technology .



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Agenda

- What are Microsoft Word templates?
- When and why should we use them?
- How do we create a template?
- Distributing templates to your organisation



What are Word templates?

- Templates are documents with certain elements pre-set
- Safely generate new documents from a template without changing the template
- Not the same as a regular Word document



When?

- Always
- Specific templates for certain repeated documents

Why?

- Saves time
- Creates consistent branding



Home

New

Open

Info

Save

Save As

Print

Share

Export

Transform

Close

Account

Options

Good afternoon

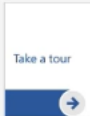
New



Blank document



Book Template - A4



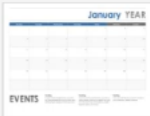
Welcome to Word



Insert your first table of con...



Banner calendar



Horizontal calendar (Mond...



Vivid shapes event brochure



Service invoice (Simple Line...



Invoice

More templates →

Search

Recommended for You

Title
Subtitle

Heading 1
Heading 2

Recent

- Edit
- Formatting

Headings Template Set

You edited this

8m ago

Digital Transformation Explanation

You recently opened this

44m ago

Proposal for Power Automate Email-to-PDF Conversion System

System Design and Workflow

Email Conversion Process

- Accurate and effective machine, the Power Automate system will trigger an automated workflow
- The workflow will take the email and convert it into a PDF format for filing
- The workflow will then process the PDFs, if any, to be saved and stored in the PDF repository.

Filing Process

Email Filing PODE

Tommy Brooks edited this

Fri at 11:01

Newsletter Tone of Voice

You shared this

Tue at 09:58

Business Plan: Commercial Department – Heliocentrix

Executive Summary

The business plan outlines the strategic objectives for the Commercial Department of Heliocentrix, a leading global organization. It provides a clear vision for the department, sets out a roadmap for achieving its goals, and identifies the key challenges and opportunities that the department will face.

Current State Analysis

The Commercial Department is responsible for client acquisition, contract management, pricing, strategy, and proposal generation. It works closely with Sales and Technical Support, with the Commercial Manager overseeing the entire commercial process.

Commercial Business Plan June 25

Ethan Kent replied to your comment

20 June

55Plus

Your Suitability & Recommendation Letter

| | |
|-----------------|------------|
| Name of Client | John, Jane |
| Date of Report | 10/01/2024 |
| Name of Advisor | John, Jane |
| Case Number | 123456789 |

Suitability letter template

Nick Dunas edited this

8h ago

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Name

Date modified



Headings Template Set
OneDrive - Heliocentrix Ltd. » Events - Documents » Webinars » 0725 - Microsoft Word Templates

34m ago



Digital Transformation Explanation
Digital Transformation Team - Digital Transformation Management » Digital Transformation Management

45m ago



Digital_Transformation_Heliocentrix
Downloads

1h ago



Webinar Example Template
OneDrive - Heliocentrix Ltd. » Events - Documents » Webinars » 0725 - Microsoft Word Templates

Tue at 17:32



Email Filing PODE
OneDrive - Heliocentrix Ltd. » Documents - Digital Transformation Team » Clients » The Pensions Expert

Tue at 17:00



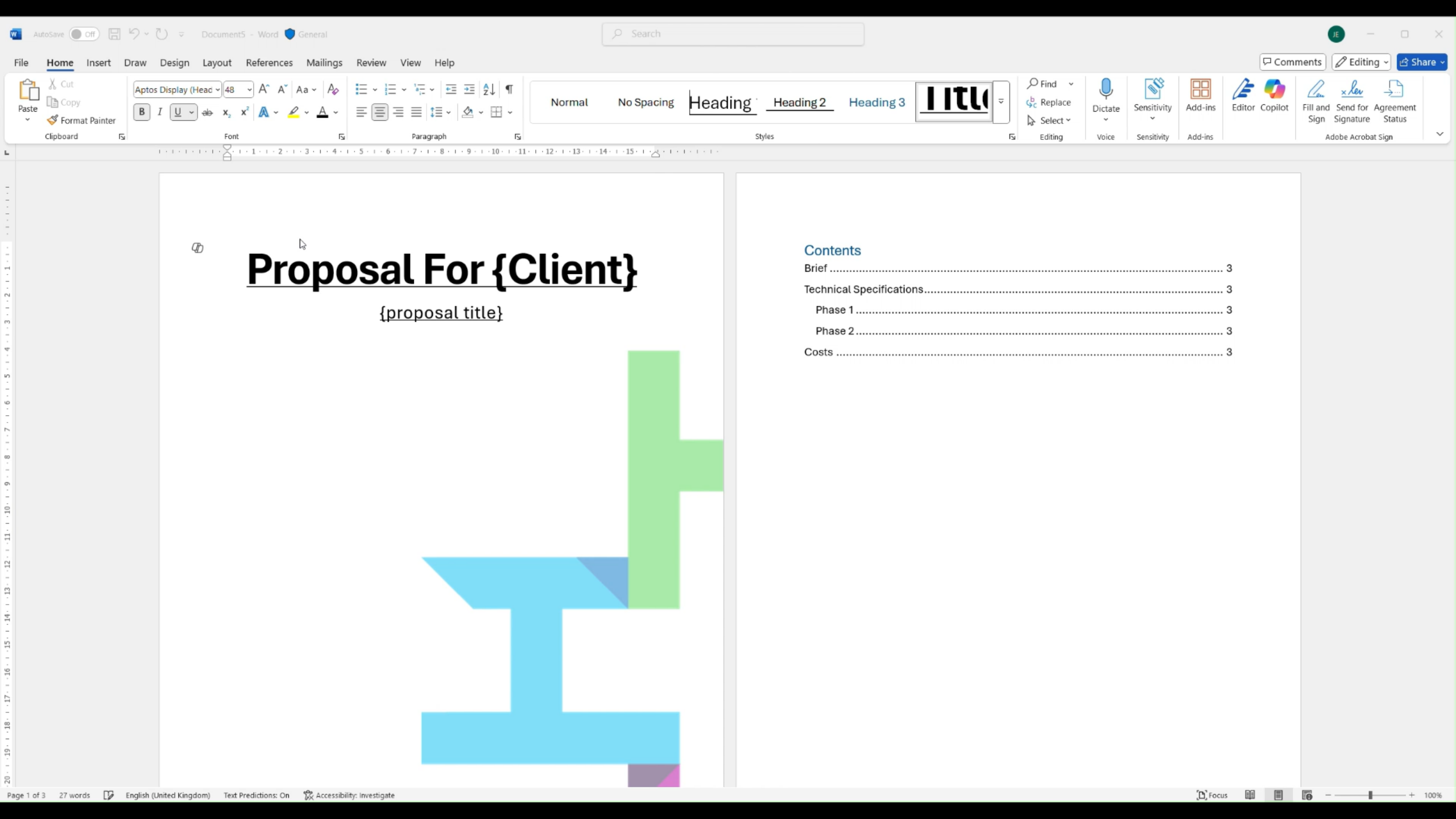
Newsletter Tone of Voice
OneDrive - Heliocentrix Ltd. » Documents - Sales and Marketing » Copilot » Agent Knowledge

Tue at 09:59



Distribution of Templates

- Traditional methods
 - Email
 - Shared Folder
- Best Practice
 - Deploy a templates folder



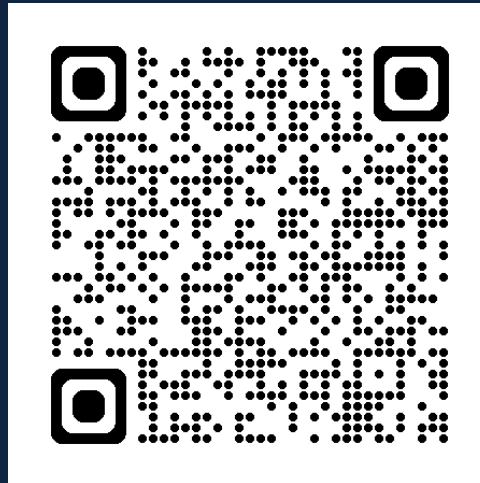


Next Steps

- Define templates list
 - Blank
 - Letterhead
 - Proposal
- Create your templates
- Deploy your templates
 - Replace “blank” template
 - Deploy Templates folder

How to learn more

- Further webinars
- Bespoke Training and Consultancy



Heliocentrix.co.uk/events