Pretty PDF

# Who owns your company documents

A one-page agreement on who decides what, so templates stay right after the day they are finished.

## The roles

- **Brand owner:** decides how every document looks. Usually marketing.
- **Content owner:** decides what one document type says. One per type: sales for offers, product management for datasheets, quality for declarations, finance for invoices.
- **Maintainer:** makes the changes to templates and layouts. An in-house person, a freelancer, template software your team runs, or a service.
- **ERP partner:** builds and changes the layouts your ERP prints, such as offers, order confirmations and invoices.

## Who does what

R = does the work, A = decides, C = is asked, I = is told.

| TASK | BRAND OWNER | CONTENT OWNER | MAINTAINER | ERP PARTNER |
|---|---|---|---|---|
| Logo, colours, fonts | A | I | R | I |
| Layout of a document type | A | C | R | C |
| Fixed text (terms, legal lines) | C | A | R | I |
| Company details (address, register) | C | A | R | R |
| Product facts on datasheets | I | A, R | I | I |
| Layouts printed by the ERP | A | C | C | R |
| New document type | A | A | R | C |
| New country or language | C | A | R | C |
| Retiring old templates and copies | A | C | R | I |

## Seven rules

1. **One master per document type**, in one place everybody can reach. Everything else is a copy.
2. **Each document type has one named content owner.** Their name is on the inventory.
3. **Layout changes go through the brand owner**, content changes through the content owner.
4. **Every change gets a version and a date** where readers can see them.
5. **The ERP layouts follow the same design** as the Word templates. They are documents too.
6. **Old templates and copies are retired, not kept.** A quarterly sweep removes them from shared drives.
7. **The roles are written down** and handed over when someone changes jobs.

Fill in names next to each role, and keep this page with the document inventory (prettypdfprinter.com/downloads/document-inventory-sheet.xlsx).