

How Therman Slashed Opportunity Cost with Increased Automation

Countless

hours saved
vs. manual
processes

98%

faster
databook
creation

100%

visibility of
submission
histories

At a glance

CHALLENGE

- Manual tracking was labor-intensive and time-consuming
- Smaller projects lacked visibility due to tracking limitations
- Formatting documents was manual and tedious

SOLUTION

- Real-time document tracking, reporting, and history generation
- Custom fields, equipment types, and metadata management
- API integration, system customization, and responsive support

RESULTS

- Automated tracking saves hours each week on repetitive tasks
- Full visibility across all projects, large and small
- Templates and automation eliminate formatting errors and busywork

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“DocBoss is an opportunity cost-saver and a risk-reduction solution that frees up our people to focus on higher-impact work.”

Kathryn Nikkanen
Senior Technical Advisor



About Thermon

Company size

1600 employees

Industry

Industrial heating

Thermon is a global provider of mission-critical industrial process heating solutions, serving industries such as energy, power generation, chemical, food and beverage, and transportation. They specialize in providing complete flow assurance, process heating, temperature maintenance, freeze protection, and environmental monitoring solutions.

Scaling visibility without sacrificing quality

Thermon has always taken pride in delivering high-quality work, backed by strong internal systems and attention to detail. But as their project volume increased and timelines tightened, the team saw an opportunity to evolve how they managed documentation.

“A project manager might have 80 projects on the go, and an engineering group might have documents for 60 projects that are in the current pipeline, and the tools used to track the status of documents required manual entry in multiple locations,” explains Kathryn Nikkanen, Senior Technical Advisor at Thermon.

They wanted more visibility. Manual tracking tools like spreadsheets and email folders weren’t built to scale or dynamically linked. The time and effort required to track document submissions, returns, and statuses manually made it unsustainable to have significant visibility for every project, so major projects were prioritized.

“We were only able to monitor submission histories on our major projects, where it was essential, because of the prohibitive labor cost involved in doing it manually,” Kathryn says.

Repetitive formatting tasks — like adding cover pages, applying stamps, and packaging files for clients — took valuable time away from higher-impact work. Thermon knew that if they could free up this capacity, they’d be able to operate even more efficiently and proactively.



Improved document control workflows

Thermon turned to DocBoss, which is purpose-built to bring automation, clarity, and control to document-heavy workflows. The platform equips Thermon to automate manual tasks, increase visibility, and support more projects without overextending their team.

One of the biggest wins was **automated tracking and reporting**. With DocBoss, the team can now monitor submissions, returns, and document status across every project in real time — no more manually updating spreadsheets or digging through inboxes and network folders.

“We have created a standard document index and document register templates in DocBoss that are added to each new project. With another button click, we can have a complete submission history report for even the simplest project,” Kathryn says.

DocBoss also allows for a lot of **flexible customization**. Thermon set up custom fields and unit types, which enables document controllers like Kristina Shaw, Senior Document Controller, to easily manage and cross-reference a large volume of incoming customer documents in addition to outgoing documents.

She says, “My side of Thermon has a lot of input engineering documents, like drawings incoming from the client. Some projects have 5,000 incoming documents or more. With DocBoss, I can quickly pull up and cross-reference all the ones that have not been assigned and know their status — Did we create a drawing for them? Do we need to? Did we miss it?”

Throughout implementation and beyond, Thermon valued DocBoss’s **responsive support and continuous improvement**. The DocBoss team was quick to answer questions, adjust features, and roll out updates based on user feedback — reinforcing that this is a partnership.

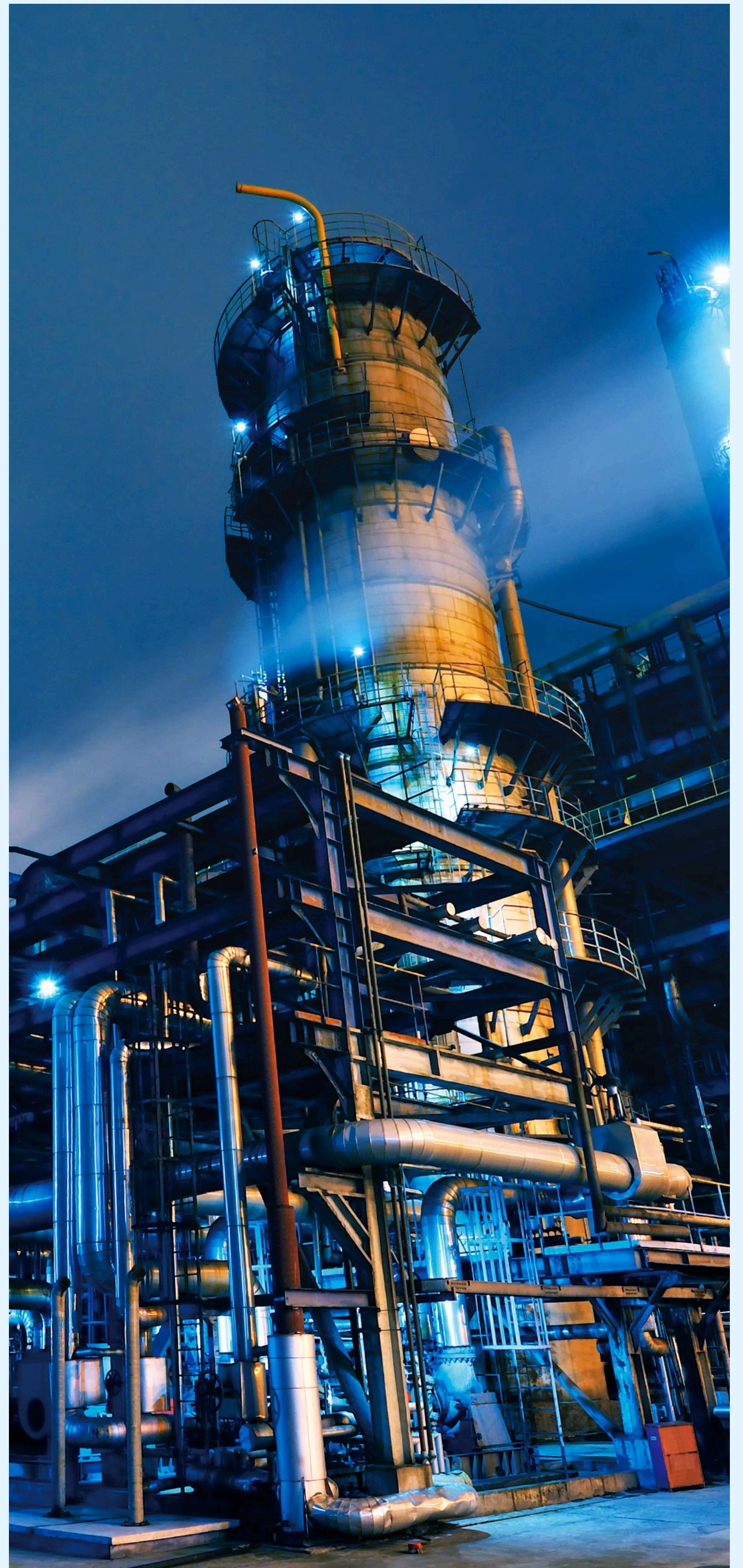
“DocBoss’s day-to-day support is incredible. They are always willing to work with me to find the best solution, and I usually receive a response back within an hour,” Kristina says.

Most importantly, Thermon gained **full visibility** into document status and history across all projects. Consolidating document tracking into one centralized system enables faster decisions, better collaboration, and a more proactive approach to delivery.

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“Our documents are tracked in every minute way, shape, and form that my team might need them.”

Kristina Shaw
Senior Document Controller



Reclaimed opportunity cost

For the first time, Thermon has full visibility across all projects — not just the major ones. Document status and history are accessible from a single dashboard, enabling real-time tracking, faster reporting, and quicker client responses. What was once reserved for Thermon’s largest, most complex jobs can now be applied automatically to even the smallest projects.

“The level of detail that used to be reserved for major projects gets added by default to every new project,” Kathryn says.

Cover pages, stamps, and metadata are now automatically generated and applied when required of a project, increasing consistency and reducing rejections. Tasks that once took hours, like generating transmittal sheets or compiling document registers, now take minutes. Thermon has mitigated the risk of human errors and delays at the same time.

“DocBoss turns final databook creation from a multi-hour task into a few clicks — saving hours and ensuring nothing gets missed,” Kristina says.

Beyond streamlining day-to-day tasks, DocBoss gave Thermon the ability to accurately track critical KPIs like document turnaround times, outstanding approvals, and submission compliance rates — metrics they couldn’t easily measure before. With reliable data, Thermon can identify delays earlier, ensure faster client responses, and optimize resource allocation across projects. This data-driven approach has allowed them to scale document control efficiently.

“DocBoss is an amazing tool. I’ve been in document control for 12 years, and I’ve never been more organized,” Kristina says.

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“DocBoss gets rid of the time wasted doing things that don’t reduce our risk and don’t improve our ability to meet a customer’s demand.”

Kathryn Nikkanen
Senior Technical Advisor

THERMON’S RESULTS

Countless

hours saved vs. manual processes

98%

faster databook creation

100%

visibility of submission histories

Manage more projects with less effort and more control.

SCHEDULE A DEMO