

How Spartan Saves 3,300+ Hours on Essential Document Customization

3,300+

hours saved annually through automation

15X

faster customer template population

214

(and counting) saved customer templates

At a glance

CHALLENGE

- High standards required fast, flawless document customization
- Manual workflows slowed delivery and limited scalability
- Legacy tools risked missed deadlines and lost opportunities

SOLUTION

- Industry-specific system tailored for process equipment suppliers
- Automated population of customer templates (cover pages, transmittals, document indexes, and more)
- User-friendly features for managing document status and timelines

RESULTS

- Faster, more accurate delivery of documentation
- Scalable workflows that make it easier to support teammates
- Greater flexibility and responsiveness to meet evolving customer requirements

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“If we were still using our old system, we would need to increase our team to support today’s document customization requirements.”

Tara Congo
Team Lead, Document Coordinator





About Spartan Controls

Company size

1000–5000
employees

Industry

Industrial
Automation

Spartan Controls is the recognized leading provider of industrial automation products, services and solutions in Western Canada. For over 60 years, Spartan has provided customers with high-performance solutions, industry expertise, lifecycle support, and technical training — delivering value and outcomes customers want. Their automation solutions are used in all process industries, including oil and gas, oil sands, mining, pulp and paper, chemical, power, pipeline, municipal, and food & beverage.

Scaling a high standard of excellence

Spartan Controls earned its reputation as a leader in industrial automation by doing more than just deliver products — they deliver reliability, precision, and trust in every client interaction. For their document coordinator team, that means creating customized, accurate, and timely documentation packages for hundreds of projects each year.

But by 2017, their legacy document system — a custom-built internal tool — was becoming a bottleneck. Broken file links, unsupported software, and hours of manual formatting were limiting their ability to respond quickly to customer requests or scale with demand.

“If any customization was required, the system was limited, and we had to add it manually. It was a good system for what we needed at the time, but as customer expectations evolved, our system couldn’t keep up,” says Tara Congo, Team Lead, Document Coordinator at Spartan.

Every project brings a new set of specifications: unique cover pages, custom transmittals, specific metadata, and final databooks tailored to the project stage or shipment. With thousands of documents in motion and client expectations rising, Spartan needed a solution that could match their operational and customer service standards without slowing them down.



Handling high-volume customization with ease

From the very first demo, Caroline Eastland, Coordinator Manager, says she felt the DocBoss team really understood Spartan's specific business challenges and requirements.

"We looked at other options, but we never found an equal. The system that DocBoss created was exactly made for this industry and what we needed. They speak our language, and it's clear they come from our world," she says.

DocBoss gave Spartan the tools to accommodate more customer requests, without adding headcount. The team now generates document placeholders directly from tagged equipment, reducing the risk of missed items.

"Cover sheets, document indexes, databooks — just about any of the templates our customers require us to use — can be customized and uploaded, and then it can auto-populate much of that information. That automation was a game changer because our previous program had none of that capability," Tara says.

The newfound ease, paired with built-in automation, improves Spartan's ability to handle tens of thousands of documents a year. Many orders require client-specific customization, which Spartan can now provide without overwhelming the team. Additionally, with every document coordinator following the same templates and workflows, team members can easily step in to support one another as needed.

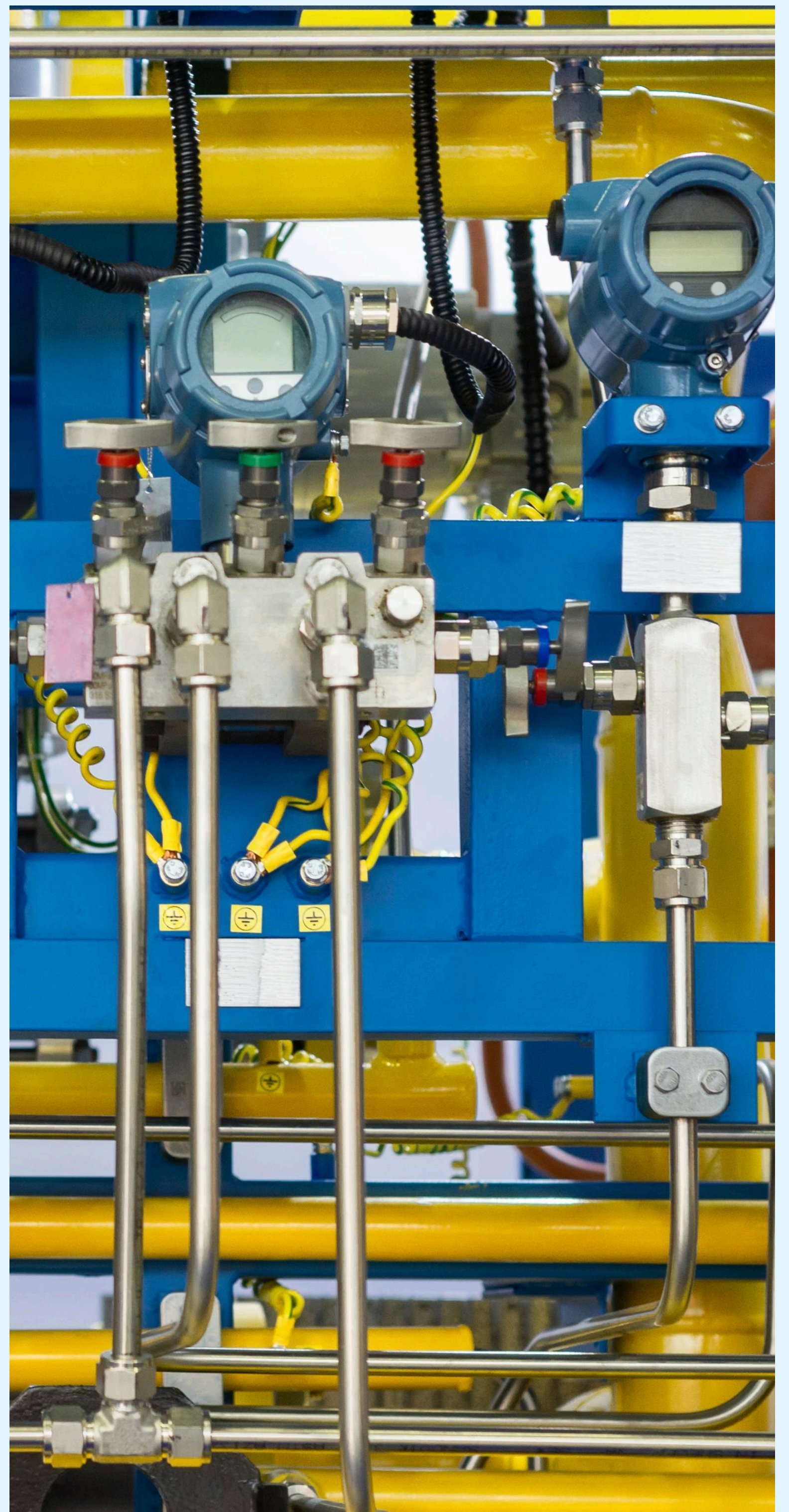
Another key differentiator is DocBoss's sterling support. Both Caroline and Tara emphasized that the responsiveness and reliability of the DocBoss support team are integral to the platform's effectiveness.

"DocBoss's support is second to none — it's spectacular. They're always available and know exactly how to help. We're not dealing with amateurs or some generic call center."

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“DocBoss is an excellent document management tool. You can pull in project information, track your history and transmittals, use templates that are at your fingertips, support customization requests and pull it all together into databooks.”

Tara Congo
Team Lead, Document Coordinator



Better output and thousands of hours saved

By automating document customization tasks and removing manual bottlenecks, Spartan has saved an estimated **3,300+ hours annually**.

This efficiency has not only improved internal operations but also improved Spartan’s ability to deliver on highly specific client requests. Fewer document errors mean fewer rejections, better client satisfaction, and stronger long-term relationships.

“One particular customer required detailed tracking, along with customized cover sheets, document numbering, and databooks. Each one of those things would have added hours of manual work pre-DocBoss, especially tracking every revision. DocBoss was instrumental in helping me stay organized throughout that project,” Tara recalls.

Caroline also notes that with their old system, the inability to handle customization requests may have resulted in lost opportunity costs. But with DocBoss, the Spartan document control team spends less time formatting and more time delivering — ensuring that Spartan’s reputation for responsiveness and professionalism stays as strong as ever.

“With DocBoss, we’re able to say ‘yes’ more often than we have to say ‘no’ — we can accommodate requests easier than we could before,” Caroline says. “You want it on pink paper? You want it to smell like cotton candy? We can deliver.” She laughs.

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“Some of our new hires, who have experience with other systems, tell us that DocBoss really is a great system to train on and learn. Logical and intuitive.”

Caroline Eastland
Coordinator Manager

SPARTAN RESULTS

3,300+

hours saved annually through automation

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Ready to reduce rework and rejection rates? Experience DocBoss for yourself with a quick demo.

SCHEDULE A DEMO 