

How Endress+Hauser is scaling documentation consistency worldwide

20

global offices using DocBoss for document deliverables review

16%

editor adoption across E+H's 50+ offices

40%

reviewer adoption across E+H's 50+ offices

At a glance

CHALLENGE

- Meeting high EPC customer expectations for every project
- Managing large, complex document sets while ensuring accuracy
- Standardizing the documentation process across global offices

SOLUTION

- Globally used tools and templates
- Centrally defined cover sheets for cross-regional consistency
- Bulk document processing and real-time status tracking

RESULTS

- 8 offices across North America, Europe, and Asia executing projects in DocBoss, with more on the way
- 2 centralized departments (Europe and India) managing projects for 12 additional offices, with all offices engaged in workflows
- Enhanced customer confidence and professional image



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“DocBoss is a shared platform that supports our high standards and strengths around the globe.”

Annelies Roelofs
Project Support

Endress+Hauser 

Endress+Hauser

Company size

17,000

Industry

industrial process
engineering

Endress+Hauser is a leading supplier of products, solutions, and services for industrial process measurement and automation. They offer comprehensive process solutions for flow, level, pressure, analysis, temperature, recording, and digital communications across a wide range of industries, optimized processes regarding economic efficiency, safety, and environmental protection.

Standardizing project documentation at a global scale

Endress+Hauser's EPC customers maintain high expectations for project delivery. Customer orders often come with extensive documentation requirements, specific standards, and detailed processes for managing documents. Before DocBoss, this repetitive work often consumed hours every week — especially for large projects. Worse, it increased the risk of mistakes.

Sina Jauch, Associate Project Documentation, explains, “If you have to make cover sheets for hundreds of documents, the chance of human error increases. Especially for really big projects, where you need to touch every page individually. It's a lot of manual work.”

The decentralized nature of Endress+Hauser's operations created further challenges; it has many offices spanning the globe and offers sales and support in more than 125 countries. But leaders like Birgit Schollmeyer knew that having a unified standard for project documentation would build brand trust and enable Endress+Hauser to better scale operations globally.

“It's about creating a standardized experience,” says Birgit, Head of Endress+Hauser's Centralized Documentation Center in Europe. “We want the same high level of professionalism and documentation control across every global entity.”



Increased automation and global alignment

DocBoss transformed Endress+Hauser's documentation process by replacing manual workflows with an automated, centralized platform. From the start of a project, teams can set up templates, document codes, and customer requirements in DocBoss. Once configured, they can create cover sheets or generate accurate transmittals for dozens of documents in bulk.

[“When I think about how much time we used to spend on document preparation, I don't think I could go back,”](#) says Annelies Roelofs, a project support employee at Endress+Hauser Netherlands. [“Now, revising cover sheets for dozens of documents takes just a few clicks.”](#)

Using DocBoss also elevates Endress+Hauser's professional image with its customers in a few key ways. First, the platform's robust tracking and reporting capabilities allow the company to take a proactive approach to customer communication. Second, offices with DocBoss can often expedite project approvals while demonstrating a level of control that clients appreciate.

[“With full control of our system, instead of being chased by customers looking for missing documents, we're usually proactively reminding them to review documents,”](#) Annelies says.

While Endress+Hauser is still working to unify processes across all offices, DocBoss has laid the foundation for consistent, high-quality documentation worldwide. DocBoss also supports Endress+Hauser's global standardization journey by hosting regular training workshops.

[“We have excellent support,”](#) Sina says. [“DocBoss hosts global training sessions that help all of our teams align on best practices, and those are very helpful. Plus, whenever I need individual help, their team is quick to respond.”](#)

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“We are taking the lead on documentation timelines by reminding customers of pending approvals, which is a level of control that most EPC customers aren't used to.”

Annelies Roelofs
Project Support



Efficiency, consistency, and customer confidence

Endress+Hauser is moving toward a future where every project, regardless of size, complexity, or location, is delivered with consistent quality, speed, and accuracy.

Today, **twenty offices** across North America, Europe, and Asia use DocBoss for document deliverables review, with more scheduled to join. **Two centralized document departments** (Europe and India) execute projects on behalf of 12 of those offices, but all 20 have users actively participating in document workflows through the platform.

“The number of global entities using DocBoss is growing. We are working towards a standardized approach to document control. DocBoss is a shared platform that supports our standards and strengths around the globe,” Annelies says.

The locations using DocBoss have already significantly **reduced manual data entry and lowered the risk of human error**. This leads to fewer rejections and faster project turnaround times. It also sets a benchmark for excellence that differentiates Endress+Hauser from its competitors.

“We’ve had compliments from many customers who tell us that our system is much better than other suppliers they’ve dealt with,” Annelies says.

By standardizing global workflows and improving efficiency, Endress+Hauser will be able to handle larger volumes of documentation without adding administrative burden. This scalability is critical for maintaining consistency as Endress+Hauser expands.

“DocBoss improves our ability to support the needs of our global team members. We’re learning about the unique demands facing every team, from Chile to Switzerland to Vietnam, and working toward a standardized process that supports everyone,” Birgit says.

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“Using DocBoss to organize, manage, and do everything with the documentation that needs to be issued to a customer results in fewer errors, more accountability, and a lot of time savings.”

Annelies Roelofs
Project Support

ENDRESS+HAUSER RESULTS

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See how DocBoss streamlines your global documentation processes.

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