



Transcript of November 2020 Admin Training Webinar

Laura: Good afternoon, everyone. Thank you so much for joining us on this Friday afternoon. We all hope you all are having a great day. My name is Laura Clark, and I am a customer success manager here at Boardable as well as a co-founder. So I have been around from the very beginning. It's been super exciting to see how Boardable has taken off. We are so appreciative to have you guys as customers. I also have Katie Cordell with me here today who is going to be helping me with the webinar as we walk through the training. And then we have Caroline Hoy on our back end who is going to help moderating that chat, answering questions for you that way. So, again, thanks so much for joining us.

As we go through this, our goal really today is to make sure that you as an administrator on the platform know what you need to know in order to get your account up and going, just get those basics for you, so you feel comfortable with those. We'll also make sure to point you in the direction of where you can get additional help if you need it after the fact. Katie, I'm gonna let you say hello to everyone.

Katie: Hi, everyone. I'm glad to be here with you today and looking forward to walking through and introducing folks to Boardable.

Laura: Great. Thanks so much. All right. We are gonna go ahead and turn off our cameras, and then we're gonna walk through our slide deck, and then we'll jump into the platform. We do have some trainings coming up that we just wanna make sure that everyone is aware of. We have our advanced administrator training coming up on November 20th. So we'll dive a little deeper into some of the different tools within the platform that we don't have time to really dig into today. Then we'll have a new user training webinar coming up on December 4th. This is designed for those new board members who are gonna be using the platform. It's not for admins, although you're welcome to join us. But we'll be focused on really just that board member

experience. And then we do offer our monthly Virtual Customer Coffee that we strongly encourage you guys all to join us at. It's really a great opportunity to chat with other professionals, other admins who are using Boardable in their organization, a great spot to just gather new ideas, get questions answered. And that is gonna be on December 8th at 11:30 in the morning. If you want to sign up for any of these, you can access them on the Boardable Academy, which we'll show you in the platform if you don't already know where that is. But that's our upcoming training.

Yeah. So we have [three current plans](#) on Boardable. So if you are a part of an organization that has been with us since the beginning or since before January 2020, you may be on a legacy plan. And just something to note with that plan is that we will be retiring it soon. So now may be a good time to reach out to your success manager to talk about our other plan options including Essentials and Professional. Our Essentials Plan allows you to have all the features of the legacy plan and...in addition to being able to track one goal and export your data in report form for the past 90 days. The Professional Plan includes these features as well, but it's really about taking your board experience to the next level. It allows you to have unlimited goals and reports. We have the option for board packet quick print as well as e-signatures for PDFs, and you also have a designated customer success manager to help you with some tips and tricks as you roll it out to your board.

I also wanted to let everyone know about some feature updates that we have in the pipeline currently. So if it's been a while since you've logged into portal, we do have updates to our [Document Center](#). You're able to upload collaborative files, organize your documents and folders into subfolders to help keep you organized. Those are both included in the Essential and Professional Plans. We are most excited to be announcing Boardable video conferencing. So this feature allows you to meet remotely with your boards as well as track your agenda progress live within Boardable and is also included in our essential and professional plans. In the pipeline coming up for new feature development, we will soon be rolling out recording within our [Boardable video conferencing](#) as well as updating our training page for board members within Boardable Academy so that they feel comfortable as new board members are coming onto boards and committees next year.

We also have some success tips that we wanna make sure to point out before we dive into the platform. As you're getting going, things you wanna keep at the top of your mind that you'll wanna do first. The first is gonna be to upload your logo in your account. Make sure to customize it so it looks like it's a part of your organization. Secondly, you're gonna wanna create your groups and committees. Then you can go ahead and enter your users into the people directory. Then we want to encourage you to talk about Boardable as often as possible to your board. Make sure that they understand that it's coming. And then make sure that you communicate to them before you send out that welcome invite to let them know that it's coming. They may need to look in their junk box for their welcome invite as it may be the first time they've ever received a notification from Boardable. So it's just a great idea to give them a heads up on that. And then finally, you can send those welcome invites.

Another thing we wanna make sure to cover before we jump into the platform is that there are three different user permission levels in the platform. There's a member, and that's gonna be the majority of your users on your account, but they're able to create meetings, polls, discussions. They can upload documents and view all the activity in their assigned group. Administrators, which is what you all are, and you can see and do literally everything within the account. You're gonna be able to access all of your billing and subscription information. You can change any of those things that you need to. You can add people, change groups, adjust your account settings. Any of that type of functionality you will be able to do as an administrator. And finally, we do offer the observer role. Observers can participate in groups, discussions, polls, and meetings when they're invited, but they're never able to see that Document Center. So just something you wanna keep in mind as you're adding users to really think through what is the best permission level for them.

All right. We're getting ready to jump into the platform and show you everything you'll need to know in there, but we wanna make sure you know where to go if you need help. You can always search in the Help Center, which we'll show you where that is within the platform, but you can search by topic. It will pull up articles for you. We also have our Boardable Academy, which you can access from within the platform that really is designed for administrators primarily with a lot of great short tutorial videos and articles that will really help you get up and going within the platform. You can

also access our live chat, which is right within the platform in the bottom right-hand corner, and we will respond to that. We do man that Monday through Friday, 9:00 to 5:00 Eastern Time. If for some reason you chat with us outside of that, we'll respond to you as soon as we get back in the office. And then finally, you can always reach out to us at support@boardable.com, and we can respond to you that way. All right. I think Katie now is going to share her screen and jump into the platform.

Katie: Yes. You should be seeing my screen now. And what we are looking at currently is the first thing that you'll be seeing once you log into Boardable. So our goal today during this walkthrough is to give you all the tools and a high-level overview for what you'll be accessing the first time you log in and where to find those features that you'll most need. I wanna start today by setting us over at the account settings. So on the left-hand side about three-quarters of the way down, you'll see the settings option. Within settings, this is going to allow you to customize your organization settings. So we have the Dashboard Message, which is a nice, friendly way to welcome people to the app, let them know they're in the right spot. You also have the option to upload your own organizational logo. People will see that in the upper left-hand corner, so they know that they're in the right location as well. You can also customize your organization name as well as the email from name. Typically, this will be your organization's name so that when folks receive emails from Boardable, they'll look like they're coming from you, and they know to open them. You're able to update time zones for new users as well as using some default agendas, so you don't have to go and recreate the wheel when you upload a new agenda for your meetings. You're also able to customize your own agenda templates here and can add an agenda template so that it meets your needs as an organization.

I briefly wanna point out the My [Groups](#) page. That's going to be about a third of the way up on the top. As you can see, I'm in two groups in this version. I'm in the finance committee. The star means that I am the group owner. And I'm also in the board. So when your members log in, they're going to be able to see which groups they're involved in quickly and access those groups directly. By selecting a group board page within the app, this is going to give your group the high-level overview of their goals, activity that people are doing within the group, as well as upcoming meetings

or polls that are currently happening. So it's just a really nice feature, so folks can track their progress as well as their own involvement within the board and get a high-level understanding of where things are at.

The next feature I wanna point out is our [People Directory](#). As you're going into the People Directory, this is really an evergreen setting that allows you to see who is involved with your Boardable in your organizational account. So you can see that we have quite a few members in our People settings here today. With those members, there's also a way to see their role within the organization, as well as on the right-hand side you're able to see the last time they logged in or if they've even logged in at all. If you need to add a new person to your account, it's very easy to do. Just go to the right-hand side and select Add Someone. Once you do that, you just need basic information. So, let's call this person Jane Doe. And I'll just use our success email here at Boardable today, so you can see. You just need the first name, last name, and the email address to add them. And then you can set their account role. So are they a member, an administrator, or an observer? As Laura went over earlier, most of your users are probably going to be members. They're able to create meetings, polls, and discussions for all the groups that they're a part of, while administrators like yourselves have full account access to Boardable, and observers are able to participate, but they do not have the permissions in order to upload documents or to make changes to the meetings.

It's very easy to quickly add folks to new groups. So if Jane Doe is on the board, but she's also on the marketing committee, I can easily select those two options. And you'll note that on the bottom here, new members are not going to be receiving an automated email at first until you choose to do that. So when I hit Submit for our Jane Doe account, you can see that she's right here, and I can either send her invitation right now, or I can go into select Edit Profile. With this option, you're able to update her board role and her term, so folks know how long she'll be on the board as well as any company contact information or about section that's helpful for her. If Jane's in a different time zone, we can update that here as well. But today I really wanna point out the notification setting. So with notifications that's about halfway down the page when you go to edit her profile, you'll see that it's immediate, periodically or do not send. Our recommendation is that most users do choose

periodically. This is going to be that digest version of their updates. So they'll receive it in the morning and then in the afternoon to see what's been happening within Boardable and within their groups during the day. If your members do choose do not send notifications, unfortunately, this is going to mean that they will not receive any communication from Boardable, and they'll have to log into the platform in order to see any updates. We don't necessarily recommend doing that.

The additional email address for notifications is a great place where folks can put in a personal email address or an email address that they use that is different than their login email address. So this is a great opportunity to add an executive assistant or an administrative assistant as well. They're going to be cc'd on that email communication for any updates about upcoming meetings or calendar invites. And then you can hit Save to ensure that all those changes go through. You can also adjust as I mentioned earlier the time zone, their role if you want to give them more or less access, as well as the groups that they're involved in. So if Jane decides she's no longer part of the marketing committee, you can easily change that at the same time.

Going back to the People Directory. As that loads, you'll see that we have some folks who have not accepted their invites. So we have 33 people in our account. Some people have not accepted. So it's very easy to give them a gentle nudge and click that to do so with a friendly message that hopefully makes them open it and log on. We also have three invitations not yet sent. So, you can always invite people, but please note that our folks who have not yet received their invitations are not yet able to log into Boardable. So, Jane Doe, you can invite her right now, very easy to invite her and just hit Send as we do that, and it goes through with that green checkmark. If for whatever reason someone like David here is not receiving our emails, maybe they're going to his spam folder, or we typed it in wrong, you can always copy the invitation link. So first you'll select David, and then on the right hand go Copy Invite Link, and copy that into an email that you are sending from your own email address. Those are our main features in the People setting. And I'm gonna turn it over to Laura.

Laura: Great. Okay. Let me share my screen with you all. All right. We are going to hop into the [Meeting Center](#). It's really probably the spot that you will spend the majority

of your time as an administrator and really probably that your board members will also spend the majority of their time there. But on the left-hand side, you'll see that Meeting tab, which I clicked into. It's going to list all of your upcoming published meetings. It also will list any of your past meetings. You can see those here as well. To add a meeting, we can come up here into the upper right-hand corner and hit Add Meeting. If I know the date of my meeting, I can go ahead and choose my time here. We also do offer two other options as well. One if I need to find a meeting date. It's kind of like a Doodle poll, but you can send out several different dates. Your users are notified of those times. They can select what works best for them. Then you as the meeting creator can see and choose the date that works best for your group. Then they're notified of that meeting date. The next option is to create a recurring meeting. That would be, for example, if you had a meeting that happened the first Monday of every month, you could certainly set that up that way. But for today's purposes, we're gonna go ahead and create a meeting on a specific day. So we are going to, let's see, create a meeting on December 11th. We're gonna have this be our working board meeting December. We can drop in a location if we'd like to. Below that, we can drop in a description. Here you have your remote options. So, if you'd like to use Boardable's video conferencing, you can choose that. If you'd like to use a third-party remote link such like a Zoom or a GoToMeeting, you can drop that URL code in here, or you can choose none.

Today, we're gonna go ahead and opt for that [Boardable video conferencing](#). Below that, you'll see your [Minutes options](#), and you'll be able to check that out and decide what one works best for you once you've gotten into there and played around with it a little bit. But that Free-Form Minutes and Notes is what we're gonna choose today. It gives me a little bit more...a few more options. And then I'm gonna assign it to my group. So I'm gonna choose my working group. And you'll notice it auto-populates everyone who is a part of that group. If I wanted to remove someone from the group, I could simply hit the red X, and it would take them out. I also can add additional individuals. If there's another user on the platform that I would like to include in this meeting, I can add them here by choosing them. And then below that, this would be the spot. If I would like to add a guest to the meeting, I can do that here. For example, I would be able to drop in an email to invite my guest to the meeting. Oops. First I need to be able to type. Okay. So we have added our guest. We'll hit Add. Below that,

we're gonna hit Save and Continue. It's gonna create our meeting. And you'll see when we get to this page at the top, there's a box up here. And what that's doing is letting us know that this meeting has not yet been published. So you've created the meeting, but the only one who would be able to see this meeting within your account are going to be administrators or group administrators. And so here you can have a couple options. The first is to Publish Calendar Only. If I want to send out a notification to my team and let them all know that I have created this meeting and I'd like them to go ahead and get it on their calendar, I can do Publish Calendar Only. I hit Publish. They'll receive an email notification. They can start RSVP'ing to the meeting and getting it on their calendar. Then I can come in and get the meeting all set up. I can build my agenda, do everything that I need to do, upload all those documents. And when I'm ready for everyone to be able to access those items, I can choose Publish Full Meeting. I would be able to go ahead and send out to all my invited users. I can hit Publish. And this meeting is fully published. And when they log into their Boardable account if they've been invited to this meeting, they're gonna be able to access this meeting page that we're on right now and will be able to see the agenda and all the documents that are associated with it.

All right. Let's talk about our meeting page. At the top, you're gonna see all of the basic information about the meeting, date, time that type of thing. Here you're going to see either the Boardable video conference, which you can click into that and join, or you would also see if you chose to add a Zoom link in there, that would live here, and they could click directly into that to join that Zoom meeting. Your users will be able to add to their calendar. Here they have the options of placing it on their calendar or integrating or syncing their calendar with Boardable. If they choose to sync their calendar, they're gonna do that within their own profile settings. If they do that, it allows Boardable to update any changes, any RSVPs that they've got onto their personal calendar. These up here are just a one-time permission and allow this meeting to be placed on their calendar. But if anything should change with it, that's not going to be reflected on their calendar. They can RSVP here to the meeting. If they haven't already done so, they would have been able to do that in the email notification or on their main dashboard page. Below that, if there are polls associated with it, they will live there, documents, tasks that are assigned. And finally, at the bottom, you're going to see those people who have been invited to the meeting. As

an administrator, you're gonna start seeing all those RSVPs populate here. You also as an administrator are able to add RSVPs for your guests if you need to. You're able to also keep that attendance during the meeting. So you would be able to click for everyone who's in attendance.

The other thing that I wanna point out here is the collaborator field. When you're creating your meeting and uploading documents and building your agenda, the only ones who are gonna be able to do that are going to be the person who created the meeting, an administrator or a group administrator. But say you have someone that you would like to add to just have access for this particular meeting. I can go ahead and hit that I want Harrison here to be a collaborator to this meeting. And that allows him to have a one-time access for this meeting to come in and help build the agenda or upload documents. So that's what that collaborator field means. If we come back up here, you can always edit your meeting information if you need to. It will take you back to that setup page, and you can edit anything you need to. We can go ahead and build an agenda. Click [Build Agenda](#). You have the options of either starting from scratch or starting with a template. I'm gonna go ahead and start with the template because I can customize it to whatever I'd like it to be. So we're starting with that template. For each section, I can click on it, and I can make any kind of changes that I need to make. I can assign it to a certain individual. I can give it a time duration, a description if I'd like to. And below that, I can upload any documents that I need to upload. If I wanna pull one from our Document Center, I would be able to scroll down, and I could pull those documents into this meeting. I also could upload them from my computer if I wanted to pull them in from my computer. I also can bring them in from Dropbox, OneDrive, or Google Drive. Sorry, I missed that there. But you can pull them in from any of those as well. I'm gonna click Save, and it creates that portion of the agenda. And I would just walk through and make sure that this agenda is set up just like I want it all the way through. When I'm done, I do have the option of saving this as a template. So, for example, if you generally have the same agenda for each of your board meetings, you can go ahead and create that template, and then each time you meet, you're not starting from scratch each time.

Let's go ahead and return to our meeting, and you'll see where that agenda sits on the meeting page. You'll see here that it sits right here on the meeting page. You're

able to open the agenda. So your users are gonna be able to open the agenda. They can walk right down through the agenda during the meeting. They can click into any of these documents, and they would be able to open them. They also can take personal notes here. So if they wanted to type a note to remind themselves of something or take notes during the meeting, they're able to do that, and it will keep track of that for them when they come back in. They are personal to them. We go back to our meeting page. They also could open it as a PDF. And if you have the professional package, you can also build a board packet and download that. So if you need to distribute that to your board, you're able to do that. Below that, you're gonna see Supplemental Documents. This area really is designed... If you have documents that you want to be associated with the meeting but maybe not a part of that agenda, you can upload them here as a supplemental document.

Couple other things to point out on the meeting page, our polls feature. If you'd like to take a poll during a meeting, you can hit [Add a Poll](#). Oftentimes, this is used for approving minutes. So we'll just choose to approve minutes. We can give it a description. We can attach a file if we'd like to. We then go ahead and give them their answer options. I can say whether they're gonna choose one answer or multiple answers. Then I'm gonna choose down here whether they need to verify their identity. This will mean that they need to enter their password in order to cast their vote, or if I just want their votes to be kept anonymous. We're gonna give it a due date, choose a particular time, and then it's automatically assigning it to this working board because it's a part of this meeting. I could assign additional individuals if I wanted to, but I'm creating this now. And just like that meeting, we do need to publish it. So when I'm ready, I can go ahead and hit Publish Poll. If I want to send out a notification, I can do that, and it will send it out to them. And that poll is published. And then your users are gonna be able to go ahead and start casting their votes. Since I am assigned to this poll, I can cast my vote. All right. We'll go back to our meeting page. So I'm gonna come back and jump on over to my meetings and pop open that meeting again that we were working on, that working board meeting. And you'll see that that poll that we just created is sitting right here.

All right. The next thing I wanna add or show you is the [tasks](#). So if you want to assign tasks, you're able to do that. I can either assign them fully to a group or a certain

individual. So, if I wanted to say, "Find new donor," I can do that. I would, again, select a date that it's due by, and then I can assign it to the entire group, or I would be able to assign it to certain individuals. I would click Save, and it's gonna create that task. All those that have been assigned the task are going to receive an email notification letting them know that they've been assigned that task. They'll also see that that task is due on their dashboard when they get to the platform or on the meeting page. Okay. Up here on this far right-hand side or far-right navigation bar, let's talk about just a couple other things. You do have the option to send a message to your meeting members. This is a really handy tool for admins. If you need to send out a reminder to them to let them know that you've attached a new document, or if you want to attach that agenda as a PDF, you can do that here, or just letting them know that it's ready for them to do their pre-read before the board meeting. So you can send that out if you need to. Below that, you do have the option to create a follow-up meeting. This would go ahead and create a next meeting. You can select the date and time, but it's gonna pull all those people who were invited to this meeting into that meeting. It also will bring that agenda from before and attach it to this. So you'll have record of that being a part of that as a continuation of the meeting.

The next tab here is a [public page](#). Many non-profit boards are required by law to share meeting agendas and details with the public, and others just simply wanna notify people outside of their Boardable account of meeting details. And then with this public page feature, you can create a public link so that you can share the URL with whomever you need to. So you can simply hit Enable. Choose what parts you want to create. Click Save. I would be able to copy this link. If I open a new tab and drop that in there, it will create that meeting page for me and that public page. So that's what that is. Pop back to our meeting page. The next thing, just quickly to point out, is take minutes. When you're ready to take minutes, you can click Take Minutes. It's gonna auto-populate that agenda for you. I can choose whether I wanna start from the agenda or if I wanna start from scratch. If I start from the agenda, it's gonna auto-populate that agenda for me. I can come in here and go ahead and start taking all of the notes that I need to take. So, I could just have a text area and start typing. I also can choose if I wanna come here. If I need to take a vote or record a decision, attendance, any of those things, but say we're gonna take a vote, I would be able to come into each person who's been a part of this meeting, and I can record

their vote. So it's all right there within the meetings or minutes. Let's go back to our meeting page. And you'll see that those minutes sit right up here at the top. You're able to open those minutes or open as a PDF.

A couple other things to point out to you as a part of the meeting suite is this. Let's go ahead and take a look at the [Boardable video conferencing](#). If you choose to use this option when your board members come to the meeting page, they'll click on Join Video Call, and it will open up that meeting page for them. They would need to click Join Meeting. And they're going to be...start seeing everyone who is invited to that meeting is going to be populated over here with their videos. The agenda is gonna sit over here on the left-hand side, and they can walk through that agenda. You're able to close up the portions of the agenda as you go through them. They're also able to click into any of the documents that they would need to that are a part of this agenda right here on this page. So it would load that document. If I wanted to present this and share this with everyone else in the meeting, I can hit Present, and for everyone else, they would see it populate here in the center of their screen. If I want to stop presenting, I click Stop Presenting. I can close that out. If I wanna go back to the agenda, I can open that back up. Whoops. Let's go back. And you'll see the agenda right here. They also can share their screen if they need to share a separate tab on their computer. They can control their video, their microphone. They can raise their hand if they'd like to say something. We also have a chat functionality over here on the left-hand side that you can chat with other people within the meeting, and you can also access just those documents that are a part of the meeting as well. So it's really a nice way to create a virtual meeting experience for your board where everything is all in one spot, and they don't have to go back and forth between tabs.

There are a couple things to make note of about the Boardable Meetings with Video. The first is that it is still in beta for us. So, we've rolled this out this summer, and we are very excited about it. We're still working through some of the kinks. So you may find a bug or two, and you can just let us know. Secondly, we want to make sure everyone knows you do need to be on a Google Chrome browser in order to use this tool. And finally, everyone does need to be right now on a computer or a laptop. Mobile phones are not gonna work on this right now. That is gonna be the Boardable

Meetings with Video. Go ahead and close that out. And, I think, we have pretty much walked through our entire meeting suite. I'm gonna go ahead and turn it back over to Katie and let her talk to you about the Document Center. And again, I remind you, if you have any questions as we're going through this, please chat those to us. We will definitely have time for that.

Katie: Thanks, Laura. I am going to share my screen now as well. I'm gonna put us back on the Boardable dashboard that you see right when you log in and show you how you can get to documents and how you can upload those. So again, you'll use that left-hand bar on the side, and about halfway through, you're gonna see documents. If you select this, this is going to take you to the [Document Center](#). As you can see right now, it took a minute to load there. These are all the documents that I have access to and that have been uploaded in my account. It starts with folders up at the top. You'll see those, but you also have the ability to upload those individual documents down there at the bottom. It's very easy to upload a new document. You can drag and drop the file here or select that bar to upload a document directly from your computer. Hit Select File. And then you can add something directly from your device. Give it a very easy name that's helpful for everyone is always my advice. And you can even add a brief note or description.

So, at the bottom here, you can choose who is going to see your notifications for that document if you want it to be an alert to be sent out to everyone who has access to the folder, or you can choose individuals. Maybe it's our Jane Doe from earlier. This document's really relevant to what she's doing. She'll get that notification. And then you can hit Submit. You'll now see that that document, it has uploaded here. You can see that I'm the one who uploaded it as well as the date or time that it's available. If you ever need to delete or move a document, it's very easy to do that by selecting the three dots and selecting Move or Delete, or if you need to keep your files a little bit more organized, you can follow the same process to create a folder. So just go up to New up at the top, select Make New Folder instead, and then you'll be able to create a new folder from there. You'll see that there are two visibility options here at the bottom. Everyone's visibility pretty much means that anyone who has access at that member, administrator level is going to be able to see the folder that you're creating, or you can choose to make it a limited access folder. So maybe this is really

important, sensitive information, and we only want the board to be able to see it, you can select Save there, and that will populate it so only the board has access.

This executive committee 2 right here, you can see populated with the lock. That means that only certain people are able to view it. If you select the three dots on the right-hand side and hit Edit, you can see the visibility has been limited so that only the executive committee can see that. And you can change that at any time if you decide that everyone needs to have access to that. I'm gonna hit Save for that. If you are enrolled in our professional plan, you do have the ability to use our e-signature function. The Document Center is where you would do that, and you can check that by going to the left-hand side and selecting All. And then you can upload a document to sign. As I mentioned at the top of the hour, one of the newer features in our Document Center is the ability to nest folders. So you are able to put folders inside of other folders. And I also wanna point out that I showed you how to upload documents from your device, but you're also able to create that live link here in the Document Center as well by linking a file from Google Drive, Dropbox, or OneDrive. Just a friendly reminder there that that is going to be a link that is live. So if people are making changes, or if they no longer grant you permission to view those files, you may no longer have access, something to be aware of on that end.

In addition to documents in the Document Center, I just want to briefly point out a couple other tools that might be really helpful in the coming months, especially as boards and committees and organizations are still remote. One of the features I think is really useful is right below documents it's our [Discussion](#) feature. So in the discussion area, this is a way that you can keep your board and committee members engaged between meetings. You can easily add a discussion up at the right-hand corner of the page, and folks are able to receive that notification directly to their email inboxes and then respond to those emails to have that drop into the discussion. So you can see we have many conversations here around, "Do we add a new executive director," as well as you can see that there have been responses and comments to those questions by other board members. I think this is a great tool to keep people thinking about the board and continue with planning even if you aren't able to meet in person during the busy holiday season.

The next thing I wanna point out is polls directly below discussions. [Polls](#) are available within the meetings, and you can have a poll, excuse me, directly with your group as well. But you also have polls that can be at the broader range. So if you have opinions or you need questions answered around your motions that need to be approved or approving minutes, you can also add these here and access them as well. The final thing I think is really helpful around keeping your board engaged between meetings is our task features. You're able to assign tasks within the meeting, but then you're also able to assign tasks to your meeting members...to your Boardable members directly. So you can see and track all your incomplete tasks with your administrative privileges. You can track who has things that are still due and where the status is with those items. The ones in yellow are some of our past due dates. And then you can also track your own tasks. So as you can see, I still need to make quite a bit of progress on sending out those donor forms, but it's very easy to track that those have been completed as you go along.

The final features that, I think, are really nice within the platform are [Reports](#) and [Goals](#). So, within the essentials plan, you're going to have access to your reports for the past 90 days, and you're able to change that view up here in the right-hand corner. With the reports, there are four main types of reports. So we have people, meetings, polls, and goals. I'm going to go into a meetings report to show you what that looks like today briefly. Within meetings, reports allow you to track attendance for your organization as well as for individual groups within the organization. So if I just wanna track board attendance and pull a report from that, let's go to a different group, for example, with the working board in the past 30 days, you can see that they've had 1 meeting that we invited 7 people, and you can also track how many people have attended. So with this meeting, you can see the attendance was fairly low, but it will give you a good view of how your meetings are being attended and what that looks like. You're able to download that as a CSV file as well so you can have access to that. So that's just one example of something that you can track within the reporting feature.

And then the final thing that I want to point out today is that goals option. So goals is a really lovely feature as you saw earlier within our groups. With the professional plan, you have access to track multiple goals at once. You can see there are quite a

few goals here. And with the essentials plan, you have the ability to create one goal that you can track. These goals if they're assigned to a particular group are going to get populated to the dashboard as well. So folks will be able to see the goal progress as soon as they log in. If you click into this goal, volunteer recruitment, you can also make updates to the progress of the goal. So you can track and see that we're on track with our progress, where we should be with the blue bar, as well as what our target is. And you can track that based on months or even by the quarter or the week. It's very easy to add progress. Up in the right-hand corner, you go and select Add Progress. And then for today's date, maybe we recruited a new volunteer. Our new volunteer count is up to 20. Maybe Laura's the person who's responsible for that. And we can say, "Hey, we added Mariah Carey as a new volunteer. We're super excited about it," and hit Save. That will update your goal progress. And you can see that that changed our progress line as well.

Okay. The final things that, I think, in addition to the features that are within Boardable that are really useful to know about are the Subscription page. And within Subscription and the [Help Center](#), you're going to be able to...excuse me. I collected that too quickly. You're going to be able to see what type of subscription, excuse me, you have within Boardable. So, this will allow you to add users or make updates to your plan at any time that's convenient for you. If you need to change your credit card information, for example, you can easily do that within the platform. The Help Center is going to be a really great resource. If you just need quick tips and tricks you say, "Hey, how do I add members?" Again, the Help Center is going to provide articles and resources to show you how to do that. My personal favorite is the Academy because that will help you with resources, guides, videos to get your board members uploaded to Boardable quickly and get them engaged with the platform very easily. The final feature that's really nice within the product is our support chat icon, which is in the right bottom hand corner here. If you select that, that's going to connect you to a live person. It's available from 9:00 to 5:00 Eastern Time, and you can have quick answers to any questions or concerns you have while you're in the product. Okay. Those are the main features that I wanted to point out. I do know that we had some questions come in through the chat.

Laura: Yeah. It looks like we did. Okay. We did have one come in from Kate Baker, wondering about if there's a way to customize profile information to include more details. Katie, since you're sharing your screen, can you pop into the profile?

Katie: Yes, I can. So, the quickest way to update those profile settings is going back to that People page. So if you have updates that you need to make, or you want more details about any of your members, you can quickly select them and hit Edit. So I'm gonna go in and edit David's profile right now. Editing the profile allows you to provide more details about them. So we have our board role, board term, job title, and company. You're also able to add bios to the board member profiles as well. Here you can upload profile images. This is a great feature because it makes it really welcoming. It helps your board members get to know one another. You can also update their contact information, so email addresses, phone numbers, social media handles, so folks can follow one another and stay informed on what they're doing, as well as updating personal information. So our personal information is private to administrators. So it's not going to be shared with the general board, but it is there for your knowledge about addresses, cities, states, birthday information, so you can...if you ever have to mail anything to your board members, you have that information at the ready. Again, with the notifications, that's a great place, and we already covered time zone, account role, and groups.

Fortunately... I'm wondering if maybe she's asking about customizing the about section or their profile section. And you're not really able to customize the different fields. I have seen some of our customers who choose to use, for example, the about section to put a certain information in there that they wanna keep or on that personal information page, choosing one of those fields and keeping that since that's private, only to admin. So, if that doesn't specifically answer your question, let us know, and we will get you more information about that. Let's see. We have a question about BMV and the number of people that are allowed to be a part on a Boardable video conferencing call. Currently, we are starting to roll out that you're gonna be able to add more than 15 users to the platform. So, I believe right now you are able to do that. You would be able to add them, and then there is going to be an area where you're able to control whether they are just viewers or whether their video is showing as the admin of that. So, there is going to be some tutorials on that within our Help

Center very soon. But, yeah, that is going to be the case for the Boardable videos. Let's see. I do see a question about, "Does the poll function have a free form field for comments?" Within the polls...let's see. I'm gonna go ahead and share my screen. If I come over to polls, on each poll, there is an area for comments. So each of your members who...everyone who is assigned to it would be able to make a comment here. They can choose whether that's gonna go to everyone, or if they want to just choose specific individuals, they can do that. But those comments can be collected here.

Okay. Let's see what other questions we have. Does the NA in the RSVP section mean that they haven't responded yet? No. Currently, within a meeting page...let's jump into a meeting page, so I can show you exactly what I mean. If they have not responded yet, you will not see anything. Actually, I'm sorry. NA, it does mean that they have not responded yet. I'm sorry. Yes, it means that they have not responded yet. So once they have, you're gonna see that those start to populate here. So if this one's a maybe, it'll populate there over that NA. So, sorry about that. I said that wrong to begin with. Let's see. I see that we have a question about the chat function in the bottom right-hand corner. So, the question was who is the chat available? Is it available to anyone within Boardable or just administrators? And the answer to that is, yes, anyone who is logging into the platform is going to be able to access that chat from 9:00 to 5:00 Eastern and be connected to a live person. So, if you have board members who have questions or are maybe a little bit nervous about getting started, that's a great place to remind them that they have that option to reach out and chat as well.

Great. Let's see. We had a couple other questions come in. One was about time zones. Since they're all over the United States, do they need to set those times for each member? You can do that if you'd like to for your board members as you're adding them or editing their profile. You also though can come over to their profile in...I'm sorry. You can do it from the People page as we went into the profiles earlier when we looked at those different fields. But each user can also adjust their own time zone. So, a specific user, when they walk through their account setup, they'll be prompted to choose their time zone. If they need to change it at any time, they can come into their profile for their own, and they would be able to access their time zone

and change it themselves as well. So, a couple different options there. You can do it for them, or they can do it themselves. It looks like too we had a question about the RSVP percentage at the top of the page. I am assuming that you're meeting on the dashboard. And I'm not sure why you're seeing 0% when there's at least one person who's RSVP'd. We'll look into that and see kind of what's going on, and we will get back to you about that because I'm really not sure why that would be happening. Okay. Do we have any other questions? It looks like maybe we've answered them all.

Laura: I am not seeing anybody, but if folks are thinking of things, feel free to keep chatting them to us, and we can answer them in real-time.

Katie: Absolutely. Another thing too that I might just toss out there for you all is that if you have other things that you would like for us to cover in administrator webinars, please let us know. We do always wanna know what is most important to you, what's kind of like your hot topic. So please let us know that because we'd love to cover those, whether that be in this 101 admin webinar or whether we do it in our advanced webinar, admin training webinar. We're always wanting to know what you would like training on. All right. Well, we wanna thank you all very much for joining us today. We really appreciate your time. We really appreciate you taking time out of your schedule to really learn how to use Boardable. We encourage you to reach out to us at any time. If you need help, we are here to help you make this a success for your organization.

Yes. And I did just see one question come in about the number of administrators an organization can have. We don't currently have limits on that, but our recommendation is typically one to three people per account, and that's really just because the administrators have access to everything, and it's really helpful for organizations to have a go-to point person who is really going to be taking that lead and be the excited person about Boardable. So my recommendation is about one to three administrators. And you are able as we showed you throughout the training to change those member profile settings. So, depending on the meeting or the group, you can change what members have access to view.

Laura: Absolutely. Okay. Any other questions?

Katie: That's all that I'm seeing.

Laura: Me too. Well, we really thank you all for joining us. We hope you have a great weekend. And always feel free to reach out to us.

Katie: Thanks, everyone. Happy Friday.

Laura: Bye.