



Buyer's Guide:

How to Defeat Board Meeting Chaos



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It's a New (and Virtual) Board Reality

Not too long ago, nonprofit and for-profit boards ran their meetings in person, taking advantage of face-to-face interactions to build strong relationships and move their organizations forward. But the days of traveling to meetings and manual pen-and-paper meeting management came to an abrupt end with the onset of the COVID-19 pandemic.

As board meetings transitioned overnight from in-person to virtual, many admins and members began piecing together their own management stack — whether that meant using widely available, consumer-grade digital tools or adopting more targeted board management software platforms.

But both approaches have their shortcomings. Almost all require constant toggling in and out of systems and tedious searching for emails and important documents, while some make it difficult to record meeting minutes that meet compliance.

Most of these issues come from the fact that the various applications don't communicate or operate well together. Users are stuck with multiple screens and steps just to accomplish the most basic tasks.

The friction and confusion caused by this hodgepodge of different tools has many boards looking for a simpler, more intuitive, more efficient board management platform. This guide will help you better understand the top features, critical functionality, user experience standards, and implementation and post-deployment support to look for when adopting a new board management platform.



Too Many Tools Too Little Gained

With remote meetings now the new normal for many boards, current board management tools haven't exactly caught up. Generally, boards must choose between one of two options: 1) rely on a host of standalone tools, or 2) try an existing board management platform.

If the board opts for standalone tools, it can quickly turn into a frustrating exercise in using — and connecting — any or all of the following just to run a meeting:

- Individual email clients
- Common video conferencing tools like Zoom or MS Teams
- Project management tools like Asana, Basecamp, or Monday
- Cloud collaboration and document management tools

If the board adopts a software platform to manage meetings, this poses another set of challenges. Repurposing the software for virtual meetings is difficult since many are built on top of existing technologies that were never designed for virtual meeting management, making them limited in critical features and functionality. Ultimately, these software tools:

- Don't provide an intuitive user experience
- Rely heavily on APIs and third-party integrations that increase the possible points of failure
- Offer only limited support and availability for both mobile and desktop experiences
- Still require add-on tools to satisfy collaboration, communication, and task management activities

To conduct virtual board meetings successfully, boards need a better option: a purpose-built, single-screen solution that can satisfy all user needs and make the continued transition to remote and hybrid meetings smooth and seamless.

The Next Generation in Board Management Software

Today's board needs a meeting management platform that gets out of their way and allows admins and members to conduct important business from anywhere — without undue headaches, technology issues, and concern about compliance. Boards shouldn't have to worry about the time spent connecting and troubleshooting different applications or if they'll be able to capture and record critical meeting minutes and other information.

The best board management solutions remove the hassles associated with virtual meetings by

End-to-end meeting lifecycle management

Every board meeting follows its own specific flow, but all have tasks that must be organized and handled correctly. The right solution makes it easy to manage the entire meeting.

Before:

- Organize information, upload minutes, and check director availability
- Distribute reports and the agenda to the board ahead of time
- Collaborate and share feedback, notes, and reference materials for a more productive meeting

During:

- Complete each agenda item seamlessly
- Vote on issues/motions, sign paperwork, set deadlines, assign tasks, and follow up on outstanding questions
- Record meeting minutes

After:

- Recap reminders and notifications for outstanding tasks, pending votes, and survey completion
- Upload and record votes, signatures, and minutes for compliance and follow-up

Optimized video experiences

In a remote meeting world, how painlessly users can view, participate, and take action on the screen is everything. A solution that optimizes the video experience can:

- Promote high-level engagement
- Provide an intuitive, user-friendly, one-screen experience for frictionless operations and effortless transition from one tool to another
- Eliminate excessive toggling and time wasted on searching for documents, notes, and minutes
- Offer a short learning curve and plug-and-play capabilities that work for any individual's level of tech savviness

How important is video conferencing these days?

65%

65% of people who use teleconferencing say it's a good substitute for in-person contact. ¹

43%

43% expect to travel less because of teleconferencing. ²

20%

20% of meeting room budget allocations were being used for collaborative technologies like video conferencing even before the pandemic. ³

2024

By **2024**, Gartner predicts in-person meetings will account for just 25% of enterprise meetings, a drop from 60% prior to the pandemic. ⁴

¹ Parker, Kim; Menasce Horowitz, Juliana; Minkin, Rachel. "How the Coronavirus Outbreak Has – and Hasn't – Changed the Way Americans Work." Pew Research. Dec. 9, 2020.

² Anticipating the Travel Recovery: Traveler Sentiment Survey, Edition 2. Oliver Wyman. Oct. 2020.

³ Cox, Adam. "20% of Meeting Room Budget Spent on Collaborative Tech." Futuresource Consulting. May 23, 2018.

⁴ "Gartner Says Worldwide End-User Spending on Cloud-based Web Conferencing Solutions Will Grow Nearly 25% in 2020." Gartner. June 2, 2020.

Accessibility features

Every board member should be able to participate and access meeting materials without barriers. The solution should:

- Provide a wide variety of digital accessibility tools — such as font size, screen contrast, and text spacing adjustments — and fast, easy navigation between them
- Enable all users to set and change personal preferences so they can comfortably view all meeting components

The focus on digital accessibility is growing:

86.4%

86.4% of website homepages have low-contrast text which falls below the WCAG 2 AA thresholds.⁵

Top 3

The **top 3** reasons organizations address accessibility are to include people with disabilities (77.6%), provide the best UX for all users (61.7%), and comply with laws (61.3%).⁶

71.4%

In 2021, **71.4%** of organizations prioritized buying a product or solution because of its accessibility, up from 55% in 2020.⁷

2023

By **2023**, digital products that fully comply with Web Content Accessibility Guidelines (WCAG) Level 2 are expected to outperform their market competitors by 50%.⁸

Built-in governance

In many cases, state law and industry guidelines require boards to record every meeting to provide an easy audit trail for compliance. The right solution built with governance as a centerpiece makes it easy to:

- Conduct polling and votes
- Capture agenda items
- Record attendance and minutes

⁵ The WebAIM Million: Accessibility Evaluation. WebAIM. 2021.

⁶ 2021 State of Digital Accessibility. LevelAccess. 2021.

⁷ 2021 State of Digital Accessibility. LevelAccess. 2021.

⁸ Compliance and Beyond: 4 Ways Digital Accessibility Gives You a Competitive Advantage. Gartner. June 15, 2020.

Security

No technology platform is worth its salt without a high level of security. The solution's security protocols must:

- Meet data governance compliance, including GDPR and CCPA, and enable responsible data stewardship
- Reduce the risks associated with email and file sharing
- Provide business continuity and disaster recovery to mitigate unexpected downtime of an app that can expose data to a breach
- Use multiple data centers and databases to close potential breach gaps

Expert knowledge and support

Deploying a software platform isn't the end of it. The right solution includes post-deployment opportunities for ongoing learning and support, and should:

- Offer an extensive library of solution implementation guidance, best practices, and how-tos for different use cases
- Provide on-demand support from product and industry experts to guide platform usage and help with custom configurations for various board needs
- Use multiple data centers and databases to close potential breach gaps



Board Management Software for an Evolving World

Boardable understands the challenges of conducting virtual board meetings in these changing times. Purpose-built by board members for board members, the platform's workflows are designed specifically for board meetings — including virtual ones — with upgrades and enhancements based on valuable customer feedback.

4 out of 5 Boardable founders actively serve in board leadership positions



Over 80% of Boardable's customer team serve on boards



Over 75% of Boardable's leadership team serve on boards and committees

With the Boardable platform, users get:

Rapid, guided deployment

Rated “fastest deployment” by G2, Boardable is ready for use right out of the box. The platform's customer success and support team guides all planning, implementation, and post-deployment onboarding and support every step of the way and with the end user in mind.

“Our board is made up of all levels of computer savvy, and we were pleased with how intuitive and easy it is to use the platform.”

Paula Franetti
Vice President of the Board of Directors,

“Boardable has a terrific, intuitive setup that helps quickly onboard committee members, [so you can] find your way around and clearly see what information you're sharing and with who.”

William Garrett
Personnel Officer, The Salvation Army -

An intuitive experience

Boardable's fully integrated, cloud-based platform removes friction and enables board members to focus on the tasks at hand by providing everything modern board meeting management requires in one solution. Users can access recordings of minutes, take notes, conduct polling and voting, and participate in video conferencing in a single, easy-to-use interface.

Boardable provides:

Must-have capabilities

The platform's e-signature feature lets board members sign documents right from the app, while the agenda builder provides customizable templates, interactive PDFs, and tools for personal notes and meeting annotations. All modules and tools are available on one screen, eliminating the need for toggling or integration with other apps. And with Boardable's shared database, users gain simple access to historical documents since they're all contained in the same platform.

Document center

Boardable's document center works like Dropbox with secure storage and document sharing. Users can send and comment on documents within Boardable, notify others of a document upload, and organize files however they want for easy reference.

Video conferencing

Optimized video conferencing with Spotlight enables board members to "meet" face to face no matter where they're located, with one-click meeting launch and no toggling between screens. Once the video conference is recorded, it's automatically available within the Boardable platform and accessible to anyone who attended, providing a single source of truth about the meeting.

The platform also integrates with Zoom, making it easy for board members who are already using or prefer the Zoom tool to join in. Board admins can schedule meetings within Boardable, then attendees can access meeting materials and join Zoom directly from the Boardable interface, eliminating the need for separate meeting links and access codes.



Boardable provides:

Accessibility

Boardable provides a personalized user experience with settings that can be configured to suit each individual's preferences and abilities. The platform is compliant with ADA and WCAG 2.1 A, AA, and AAA. It offers customizable font sizes, hyperlink colors, and the ability to pause animations, as well as a screen reader with slow, medium, and fast settings. A high-contrast screen and dyslexia-friendly font round out the accessi-

Syncing with common tools

The calendar feature in Boardable seamlessly syncs with Google Calendar and Outlook for effortless scheduling. Boardable also connects with existing external productivity tools like Microsoft Office, Sharepoint, and Google Drive for easier collaboration — without the threat of data or information loss.

Knowledge base and support

With Boardable's expansive knowledge base and dedicated support, users know they can get help and guidance from people who understand the business of board management. Whether it's industry knowledge or best practices, users learn how to apply both directly in the platform.



Flexible pricing, comprehensive platform

Every board is unique. Boardable offers flexible pricing and configurations for boards, teams, and committees so users can focus on what matters most. Packages can be customized to add more users to accommodate organizations of any size and with different use cases.

Resources are always limited, but even more so these days. Boardable is built for board leaders and admins that need a comprehensive solution at a fair and flexible price. Users don't want to deal with surprise add-on costs, which is why packages are structured to give an all-inclusive management experience and scale with an organization's growth. The full Boardable platform is similarly priced to a corporate video conferencing license.

Get the highest value for the right board management solution:

- Fair and flexible pricing
- All-inclusive board management experience
- Scale users without having to resign a contract



Maximize Board Meeting Management with an Expert-Built Platform

Board meeting management may have changed dramatically in the past couple of years, but the transition from the boardroom to the virtual meeting room doesn't have to be a chaotic one. Some older board management software platforms are too clunky and don't have key functionality, requiring admins and members to manually intervene with cobbled-together add-ons and inefficient workarounds. But Boardable is the only fully integrated board management software that seamlessly meets the needs of today's board.

Developed by experienced board members and admins, the Boardable platform provides complete, end-to-end board meeting management with all tools, capabilities, features, and functionality found in one cohesive and intuitive user interface. The platform is built from years of hands-on board management experience and supported by a team of industry experts who recognize how virtual meetings are now driving the board meeting management industry.

A nationally recognized thought leader in board management, Boardable has been covered in Forbes, Inc., U.S. News & World Report, and Associations Now, and is a category leader on comparison sites that include G2, Capterra, and GetApp. Boardable serves more than 2,000 organizations — ranging from nonprofit, healthcare, education, and enterprise business — in over 40 countries.

To see how Boardable can improve and enhance your board's virtual and hybrid meeting management, schedule a demo today.

BOOK DEMO

Learn More

(317) 689-0990

www.boardable.com

go@boardable.com

US | UK | Canada | Australia