

## We will get started soon!

- Please enter your questions in the chat area during webinar.
- Comments and questions will be addressed at the end.
- Try using Google Chrome or Mozilla browsers for best results.
- We send a replay and the slide deck in the next few days.
- For connectivity problems, try the “Reconnect” button at the top.



# **BOARDABLE NEW RELEASES**

March 2020

# Who you will be hearing from today



**Caroline Hoy**

Content Manager,  
Webinar Moderator



**Krista Martin**

VP of Product



**Jeb Banner**

Founder and CEO



**Samantha  
Alerie-Leca**

Director of  
Customer Success

## Company and Product Vision

### Boardable Cares Initiative

### How Boardable is working remote

- Slack, Pragli, Zoom and Boardable
- What we are learning



**Jeb Banner**  
CEO/Founder

Speaker View

Click if you want to switch to a different microphone or speaker

Mute Stop Video Invite Participants Share Screen Chat Record Reactions Leave Meeting

## Customer Success Resources

**Upcoming Webinars**

**Training Resources**

**Community Connections**



**Samantha Alarie-Leca**  
Director of Customer  
Success

# Customer Success Updates

## Upcoming Webinars

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- Effective Virtual Meetings
  - March 26 at 2pm ET
- Training Webinar: Admin 101
  - April 3 at 2pm ET
- Training Webinar: New User 101
  - April 10 at 2pm ET

## New Connections

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- Boardable Virtual Coffee Hour
  - Tuesday, 11:30 am ET
  - Zoom Conversation
- Boardable Basics: Now Live!
  - Quick Start Trainings
- Boardable Connect Newsletter
  - Opt-In: Monthly Cadence

# Quick-Start Training Academy



## Boardable Basics

Set up for success with quick-start resources to run better board meetings.

On-demand 2-min video tutorials, downloadable jumpstart guides, and success tips all in one easy location.



# Brief Instructional Videos

Streamline your account setup, meeting facilitation, and board rollout processes with step-by-step instructional videos.

Set-Up Build Meetings Rollout



**Boardable Overview**



**Organization Settings**



**Admin Account Settings**



**Set Up Document Center**

On-demand 2-min video tutorials, to help you set-up, build, and rollout Boardable as quickly as possible.

# Quick-Start PDF Guides

## Welcome to Boardable!

Ready to jumpstart your new board management software? It's easy to set up, build, and roll out your Boardable account. We've got you covered in five simple steps.



### Set Up

1

#### Customize Organization Settings

- | Click on **Settings** in the left navigation menu
- | **Dashboard:** Enter a welcome message and mission statement to the dashboard
- | **Organization Info:** Add your organization's name, email "from" name, and logo
- | **Content:** Select a default timezone and agenda style formatting
- | **Agenda Template:** Create and save meeting agenda templates for easy access



**Success Tip:** Add your administrator's contact information and links to training resources like the help center to the welcome message in your dashboard.

Downloadable PDF onboarding guides with step-by-step tips for success with your board.

# Product Updates and Virtual Tips

**Product Updates**

**Virtual meetings with  
Boardable**

**Facilitation Tips**



**Krista Martin**  
VP Product

# Boardable Product Updates March 2020

## Notifications

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- Streamlined notification experience across the product
- Broadcast Announcements (Pro)
- Notifications History
  - Personal
  - Organization (Pro)

## Meetings

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- Public Meeting Pages
- Board Packet Quick Print (Pro)
- Remote Meeting URL

# Updated Notifications

All notifications allow you to add or remove individual users, as well as providing sets of users depending on the context.


- Sets of users to select from
- “What you see is what you get”

### Publish Meeting ✕

**Message** (optional)

**B** *I* ☰ ☷ 🔗 🔗 *I*<sub>x</sub> Paragraph ▾

Notifications will be sent to:



Collaborators  Invited Users

Individuals ▾

Cancel Publish

# Broadcast Announcement

## Send message

Send a quick message to some or all users.

**Subject**

**Notifications will be sent to:**

Board  Advisory Board

Finance Committee  Governance Committee

Membership Task Force  Everyone

**Individuals** ▾

**Message**

**B** *I* ☰ ☷ 🔗 🔗 *I*<sub>x</sub> Paragraph ▾

Send out a message at any time to your users.

# Organization Notification History

## Notifications History




Log of notifications sent to you

My Notifications

Organization Notifications

Clear

Search

-  To: Kara Rager  
Meeting summary for March Board Meeting  
March Board Meeting  
08:04 AM Mar 09, 2020 9
-  To: Jacob Smith  
Meeting summary for March Board Meeting  
March Board Meeting  
08:04 AM Mar 09, 2020 9
-  To: (Guest) Sarah  
Meeting summary for March Board Meeting  
March Board Meeting  
08:04 AM Mar 09, 2020 9

View all notifications sent from  
your Boardable account.

# My Notification History

## Notifications History

Log of notifications sent to you

My Notifications

Organization Notifications

Clear

Search

To: Krista Martin



*Adding a new comment to a document in the Document Center is great! I choose either Everyone or Individuals.*

Comment on: June Board Meeting Packet

04:19 PM Mar 10, 2020

To: Krista Martin



*Hello, please choose if you would like to make a comment and notify either Everyone or Individuals.*

Comment on: New Notifications for Discussions

02:39 PM Mar 10, 2020

View all notifications sent to you from Boardable.



## March Board Meeting

 Tuesday, March 31 2020 [Add to Calendar](#)

 12:00pm - 1:00pm CDT

 6219 Guilford Avenue, Indianapolis, IN 46220

 <https://meet.google.com/skp-psvh-tcq>

Dial-in: (US) +1 530-517-7001 PIN: 170 873 142#

Looking forward to seeing everyone for our March board meeting. Please review all the attached materials and come prepared to share ideas for our upcoming gala.

### Minutes

[Open Minutes](#)[Open as PDF](#)

### Polls

[+ Add Poll](#)

**Answered** Do you approve Krista as the new marketing committee chair?

1 / 6 submissions

RSVP  
Yes

[Edit Meeting Info](#)

[Edit Agenda](#)

[Edit Minutes](#)  
published

[Send Message](#)

[Create Follow Up Me](#)

[Public Page](#)  
enabled

[Meeting Published](#)

3:01


[Meetings](#)

MARCH 31, 2020 12:00 - 1:00 PM

## March Board Meeting

Looking forward to seeing everyone for our March board meeting. Please review all the attached materials and come prepared to share ideas for our upcoming gala.

 Remote URL - Dial-in: (US) +1 530-517-7001  
PIN: 170 873 142#

 6219 Guilford Avenue, Indianapolis, IN 46220

# Remote URL Field

Access the link on the meeting page, public page, and mobile app.

### Public Meeting Page

**Public Url** Open

<https://app.boardable.com/boardable-mobile-app-session/meetings/public/80927dc> Copy

Enable Public Meeting Page

**Include:**

- Overview  
the meeting description content
- Agenda  
viewable after the meeting is published
- Minutes  
viewable after the minutes are published
- Attendance  
viewable after the meeting is over
- Remote URL

**Save**

# Public Meeting Pages

powered by  boardable



## March Board Meeting

6219 Guilford Avenue, Indianapolis, IN 46220

<https://meet.google.com/skp-psvh-tca> Dial-in: (US) +1 530-517-7001 PIN: 170 873 142#

**March 31, 2020** 12:00pm - 1:00pm CDT

[Add to Calendar](#)

Overview

**Agenda**

Minutes

## Agenda

I. **Call to Order**

KRISTA MARTIN 5 mins

II. **Old Business**

BRITTANY FLORENTINE 15 mins

III. **Approval of Minutes**

JILL BARNES 10 mins

IV. **New Business**

10 mins

Share important meeting  
details with a wider audience.

# Board Packet Quick Print

- Converts a variety of files into a PDF
- Compiles all documents into one PDF
- One click to open or print in web app and mobile app

## Agenda edit

**Documents in Agenda**   [Open All \(PDF\)](#)   [Print All](#)

-  2018-04-04 Draft Agenda Future Meeting.pdf
-  Governance Report.pages
-  Budget Variance Report (1).pages

3:14 📶 🔋


[← Back](#)   Meeting Agenda

March Board Meeting - Agenda


March 31, 2020   12:00 - 1:00 pm


[Download all documents](#)

**I. Call to Order** 5 MIN


 Assigned to: Krista Martin

**II. Old Business** 15 MIN

 Assigned to: Brittany Florentine


 2018-04-04 Draft Agenda Future Meeting.pdf

**III. Approval of Minutes** 5 MIN

 Assigned to: Jeb Banner

**IV. New Business** 10 MIN

**V. Changes to the Agenda** MIN

 Assigned to: Krista Martin

[Home](#)   [People](#)   [Docs](#)   [Groups](#)   [Goals](#)

# Boardable Pricing

## ESSENTIALS

Streamline your board experience by centralizing communications, document storage, and meeting planning.

**\$79.00** /month








-  10 users
-  1 Goal
-  90 Days of Reports
-  Email & chat support

Select

## PROFESSIONAL

Take your board to the next level with advanced tools and dedicated support that offer a more professional board experience.

**\$199.00** /month

-  10 users
-  All Time Reports
-  Unlimited Goals
-  Broadcast Announcements
-  Board Packet Quick Print
-  Organization Notifications History
-  Dedicated support

✓ Selected

## ENTERPRISE

Let us help you expand with custom reporting, 3rd-party integrations, multiple account instances, and premium consulting.

Contact us for pricing

-  Includes up to 1,000 users
-  Dedicated support
-  Multiple account instances
-  Nonprofit expert consulting services
-  Third-party integrations

Select

# Virtual Meetings in Boardable

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- Public Meeting Pages
- Remote URL field
- Download the Mobile App
- Electronic voting with Boardable Polls
- Agenda Builder and Minutes Maker
- Private Agenda Notes
- Task management for accountability between meetings
- Discussions

# Virtual Meeting Tips for Attendees

- Sign in 2-3 minutes early
- Mute your microphone if you are not speaking
- Have one screen or monitor open at the time
- Close unnecessary tabs
- Encourage others to share their cameras
- Be understanding (babies, dogs, cats)
- Have listeners raise their hand for questions
- Use chat to moderate a large number of questions

# Virtual Meeting Tips for Facilitation

- **Sign in 5-10 minutes early**
- **Designated facilitator**
  - **Strongly recommend that it is a different person than the person taking notes**
- **Designated timekeeper**
- **Designated notetaker**
- **Technical point person**
  - **Set up a dress rehearsal with all speakers**
  - **Test screen share, audio, and captions if needed**



# Q&A DISCUSSION



**Request 90 day trial of professional features**

**success@boardable.com**

## Need Additional Help?

- Search in the **Help Center** (new articles).
- Browse the **Resource Library** on our website.
- Send messages 9am- 5pm ET for live **Chat Support**.
- Email **support@boardable.com**
- Contact your dedicated success manager

