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

boardable

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

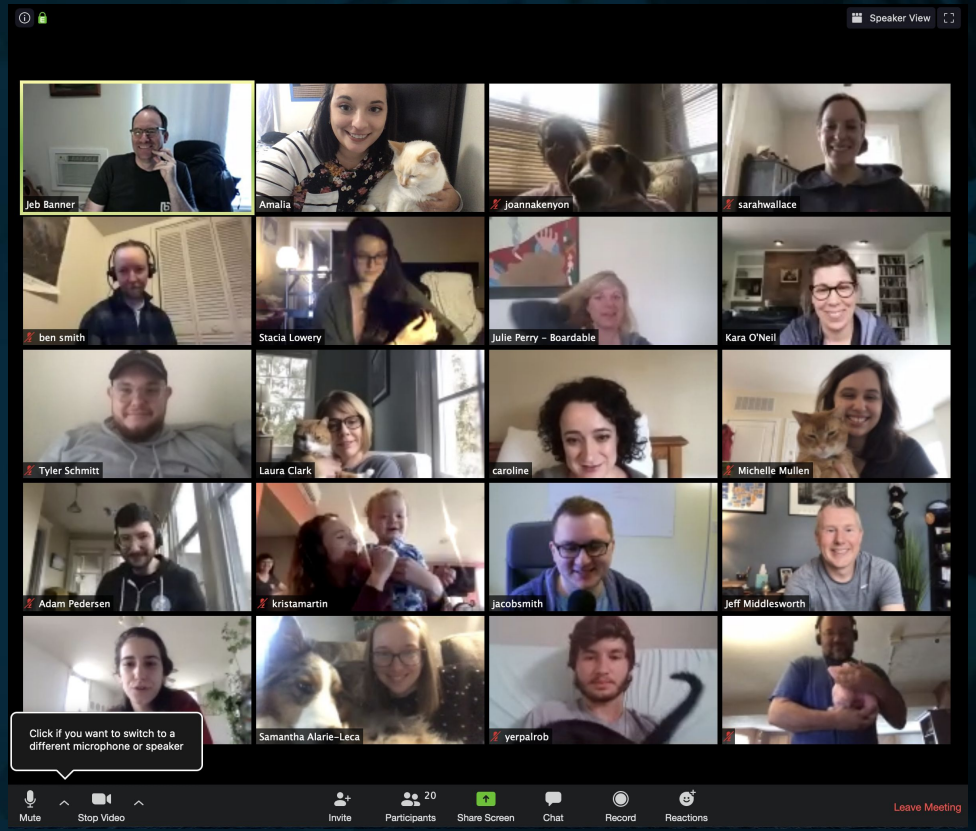
Company and Product Vision

Boardable Cares Initiative

How Boardable is working remote

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

Jeb Banner
CEO/Founder


Speaker View
Jeb Banner
Amalia
joannakenyon
sarahwallace
ben smith
Stacia Lowery
Julie Perry - Boardable
Kara O'Neil
Tyler Schmitt
Laura Clark
caroline
Michelle Mullen
Adam Pedersen
kristamartin
jacobsmith
Jeff Middlesworth
Samantha Alarie-Leca
yerpalrob
Click if you want to switch to a different microphone or speaker
Mute
Stop Video
Invite
Participants
20
Share Screen
Chat
Record
Reactions
Leave Meeting

boardable

Customer Success Resources

Upcoming Webinars

Training Resources

Community Connections

Samantha Alarie-Leca
Director of Customer Success

Customer Success Updates

Upcoming Webinars

- 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

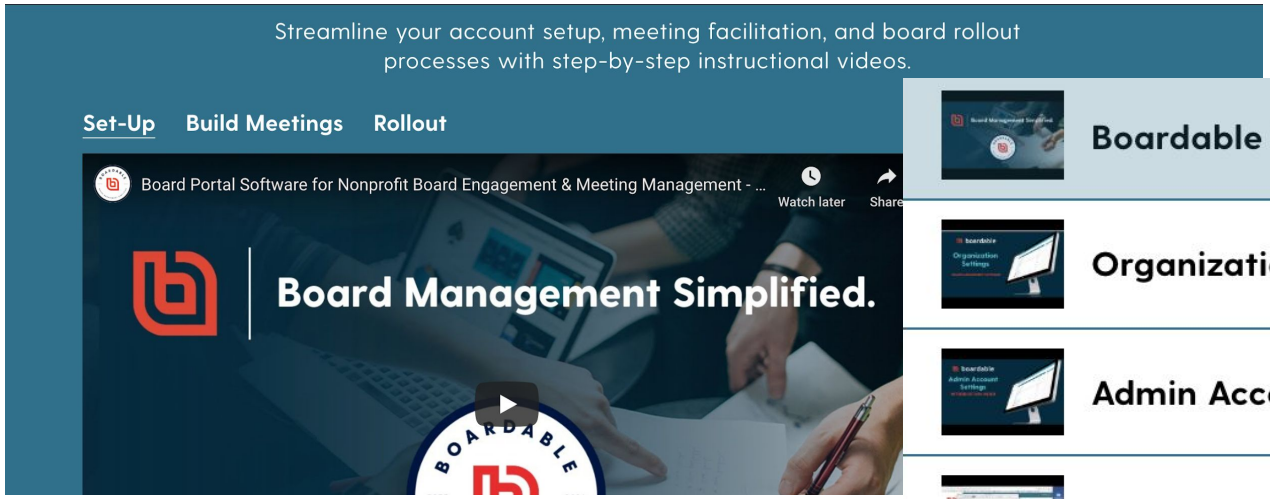
New Connections

- 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

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

Brief Instructional Videos



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

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

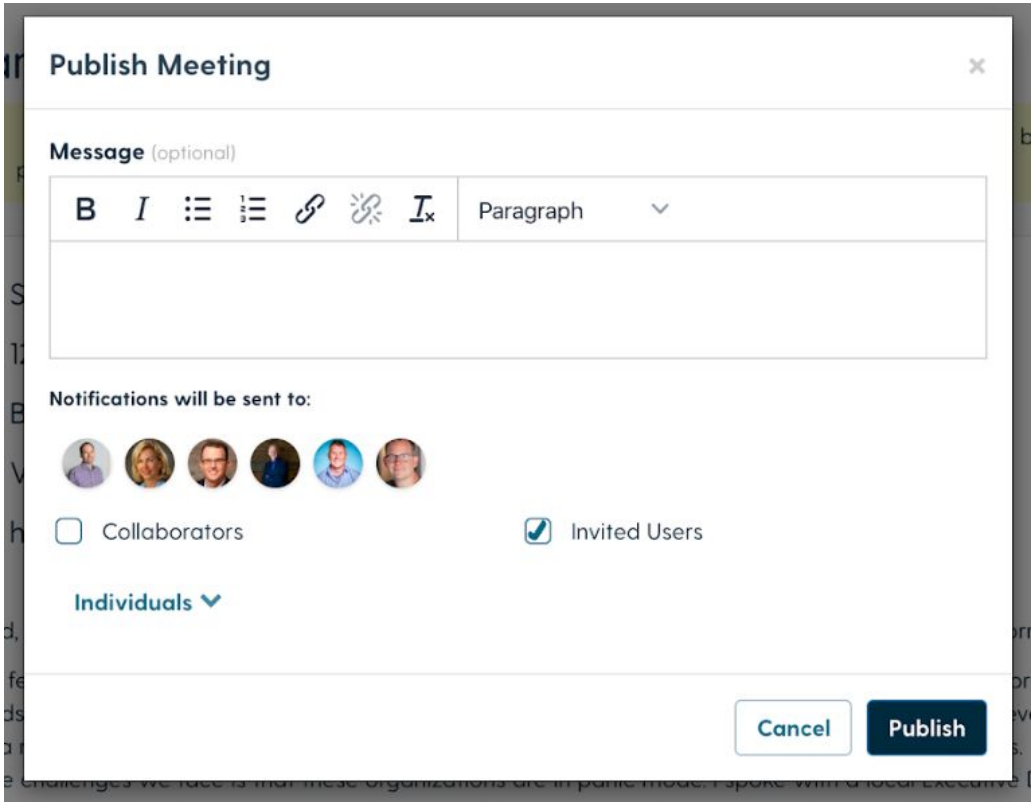
Meetings

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

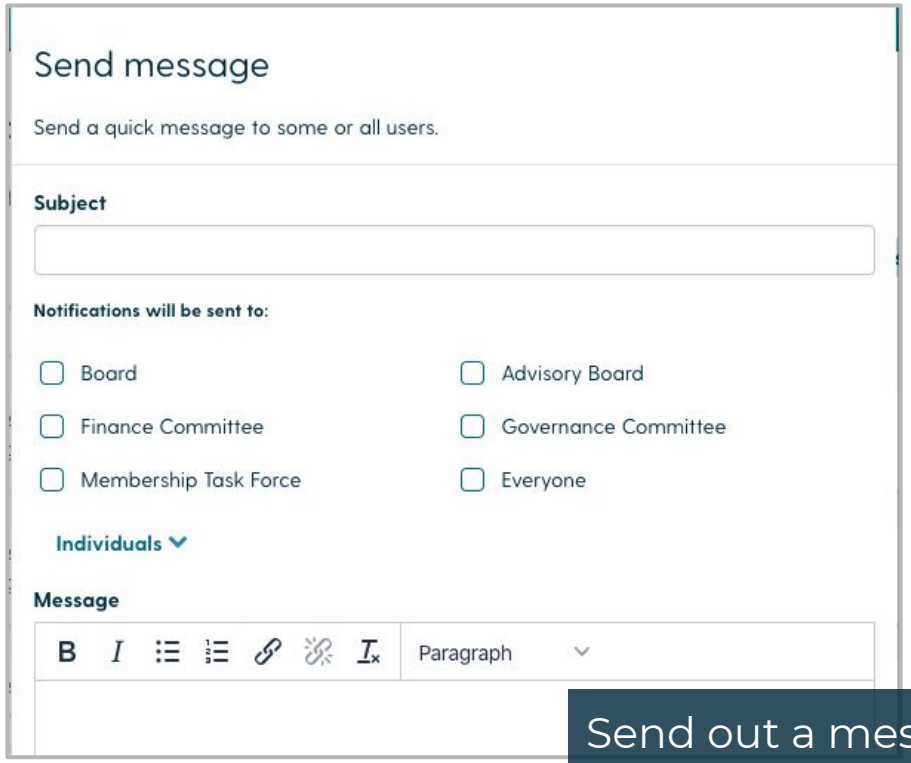
Updated Notifications

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”

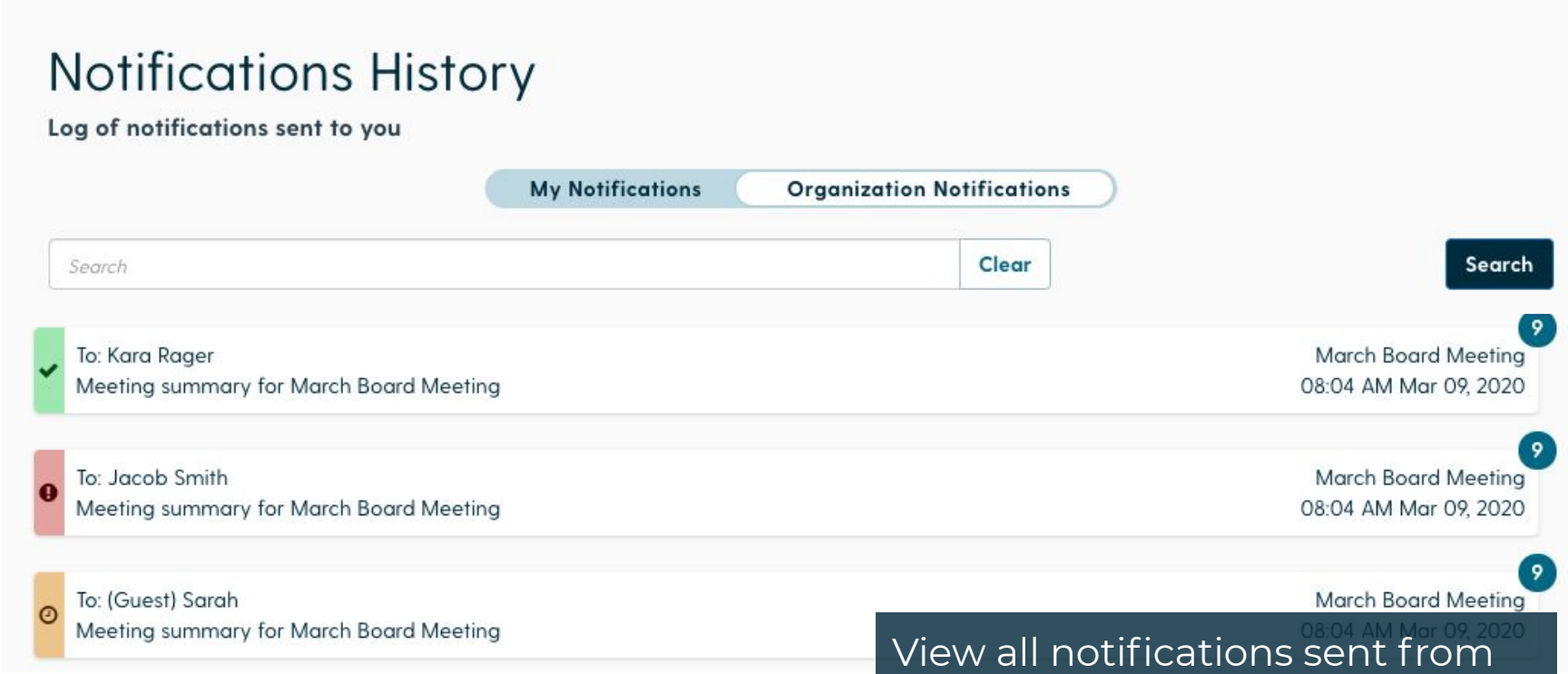


Broadcast Announcement



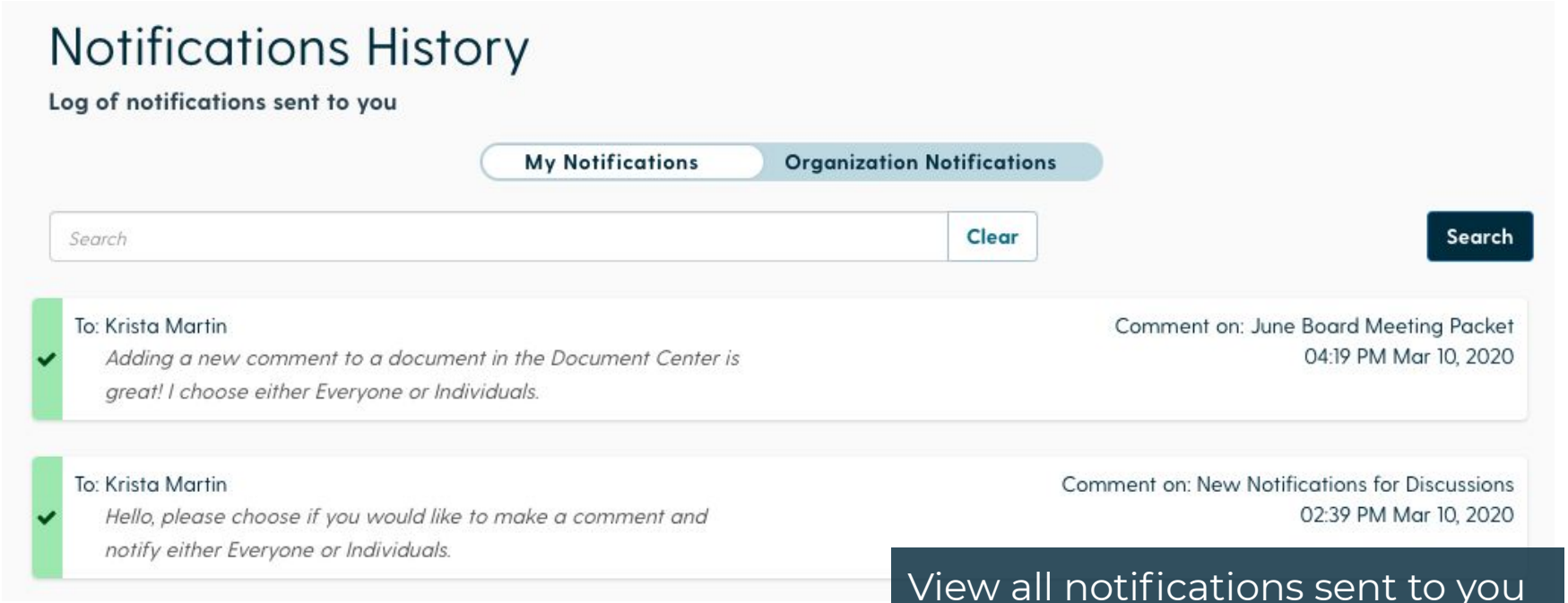
Send out a message at any time to your users.

Organization Notification History

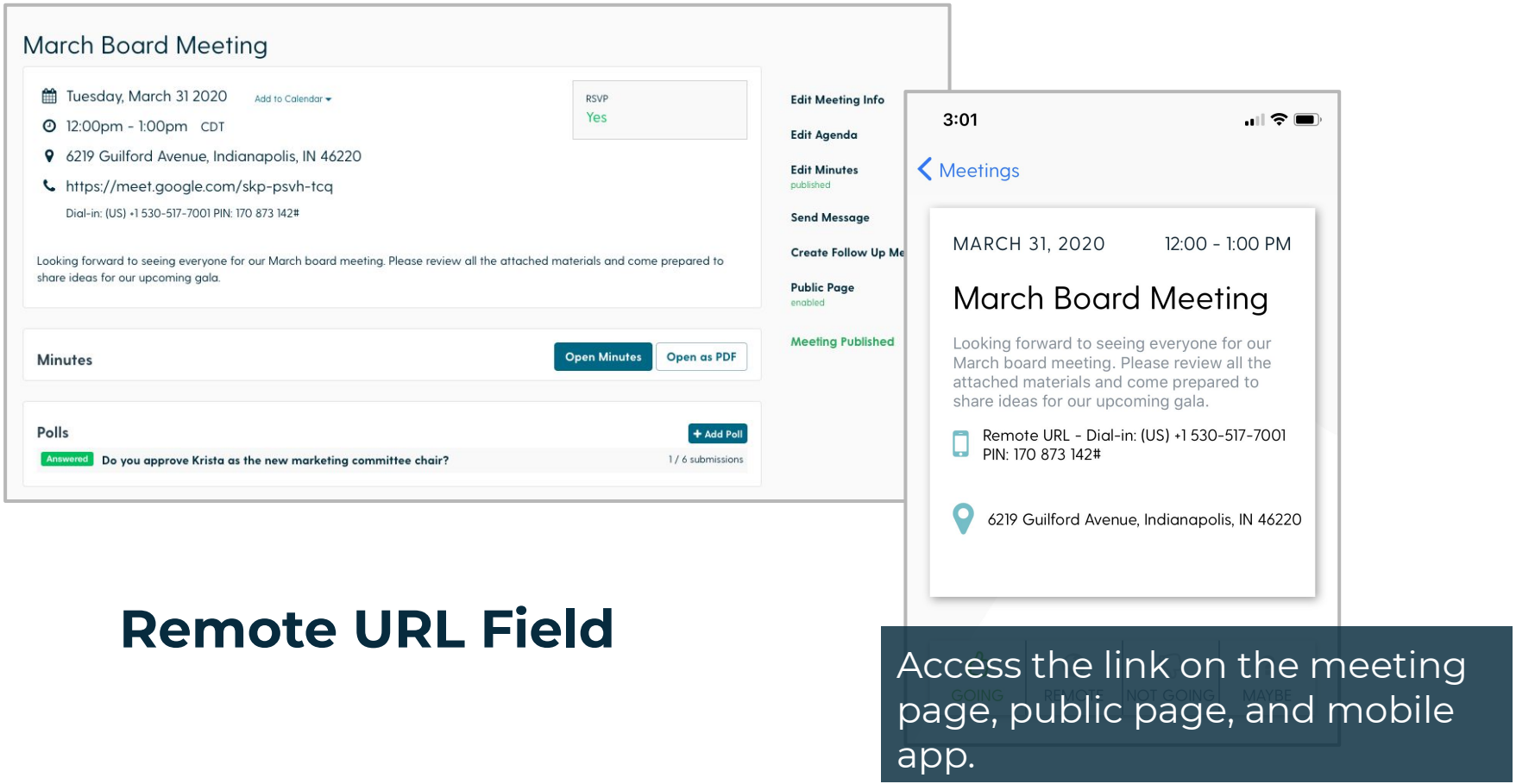


View all notifications sent from your Boardable account.

My Notification History



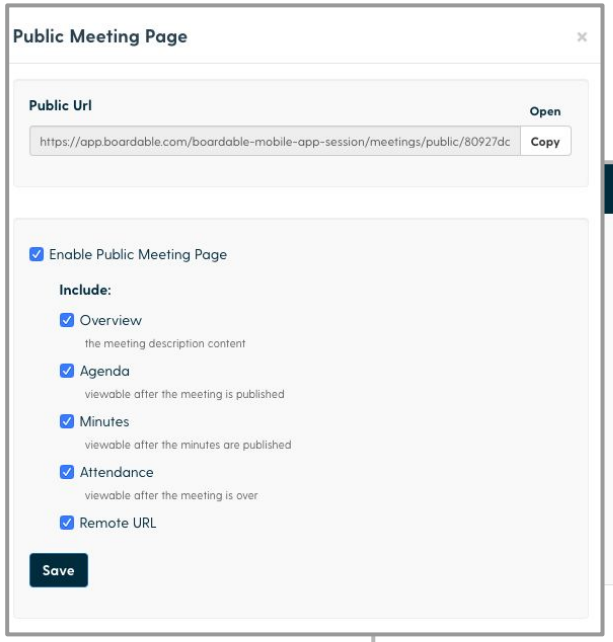
View all notifications sent to you from Boardable.

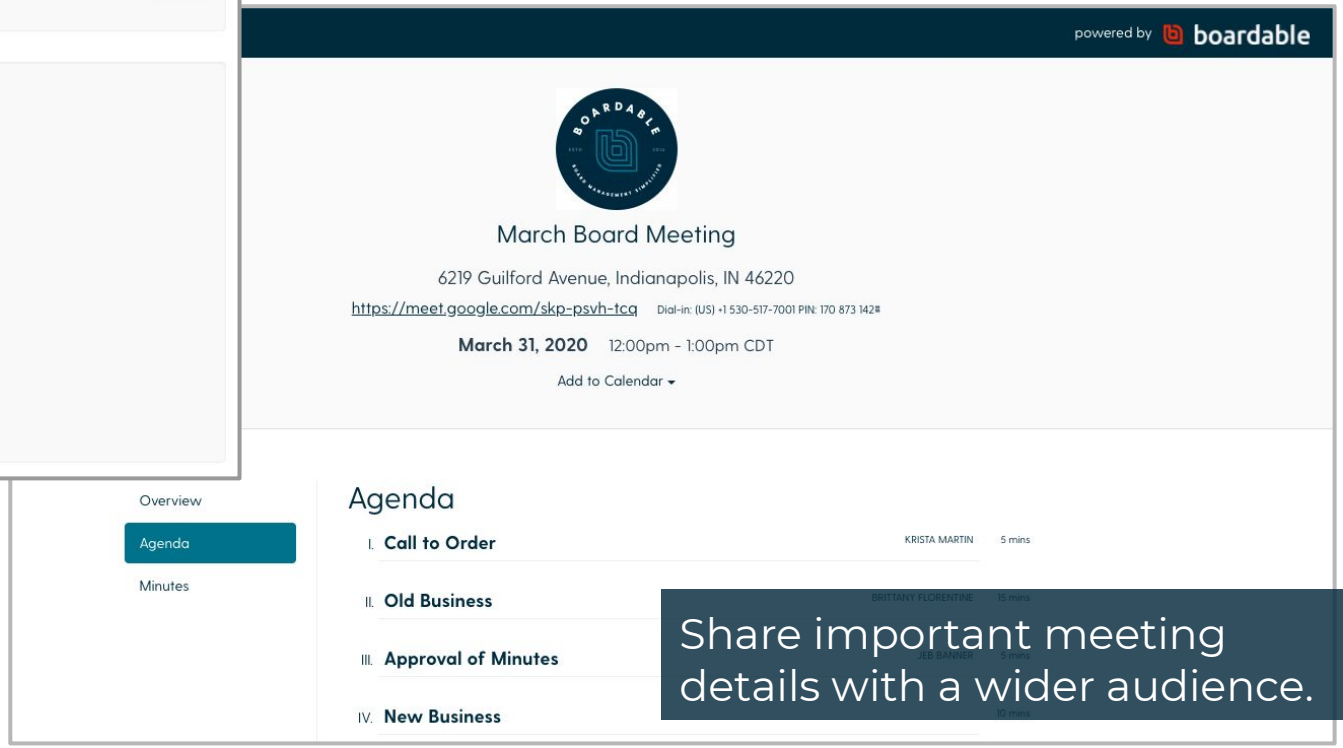


Remote URL Field

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

Public Meeting Pages

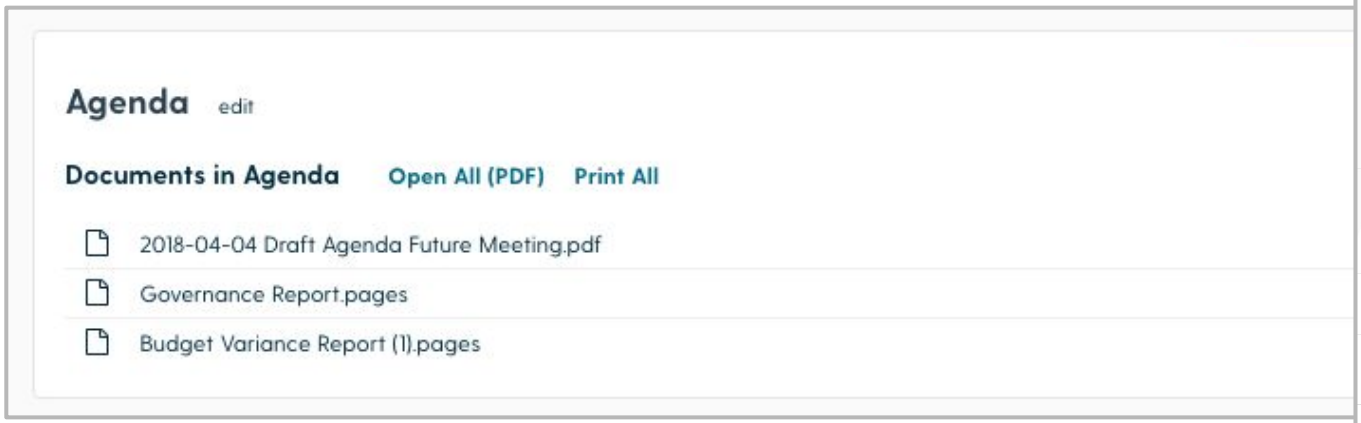


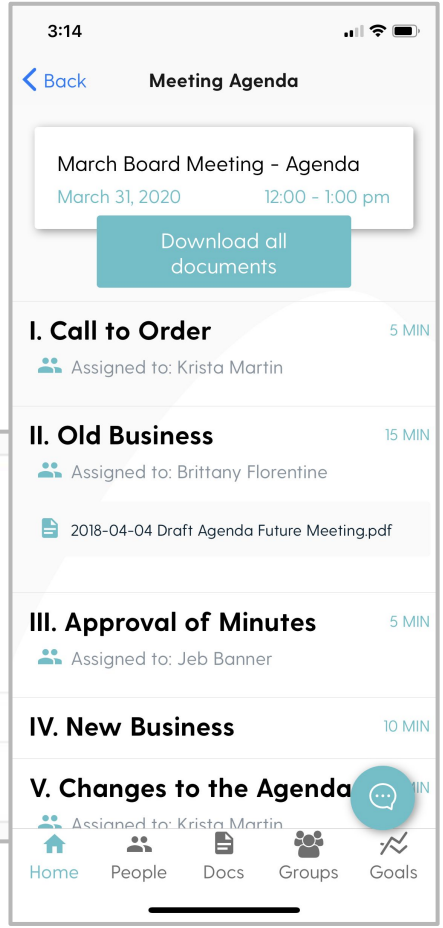


Share important meeting details with a wider audience.

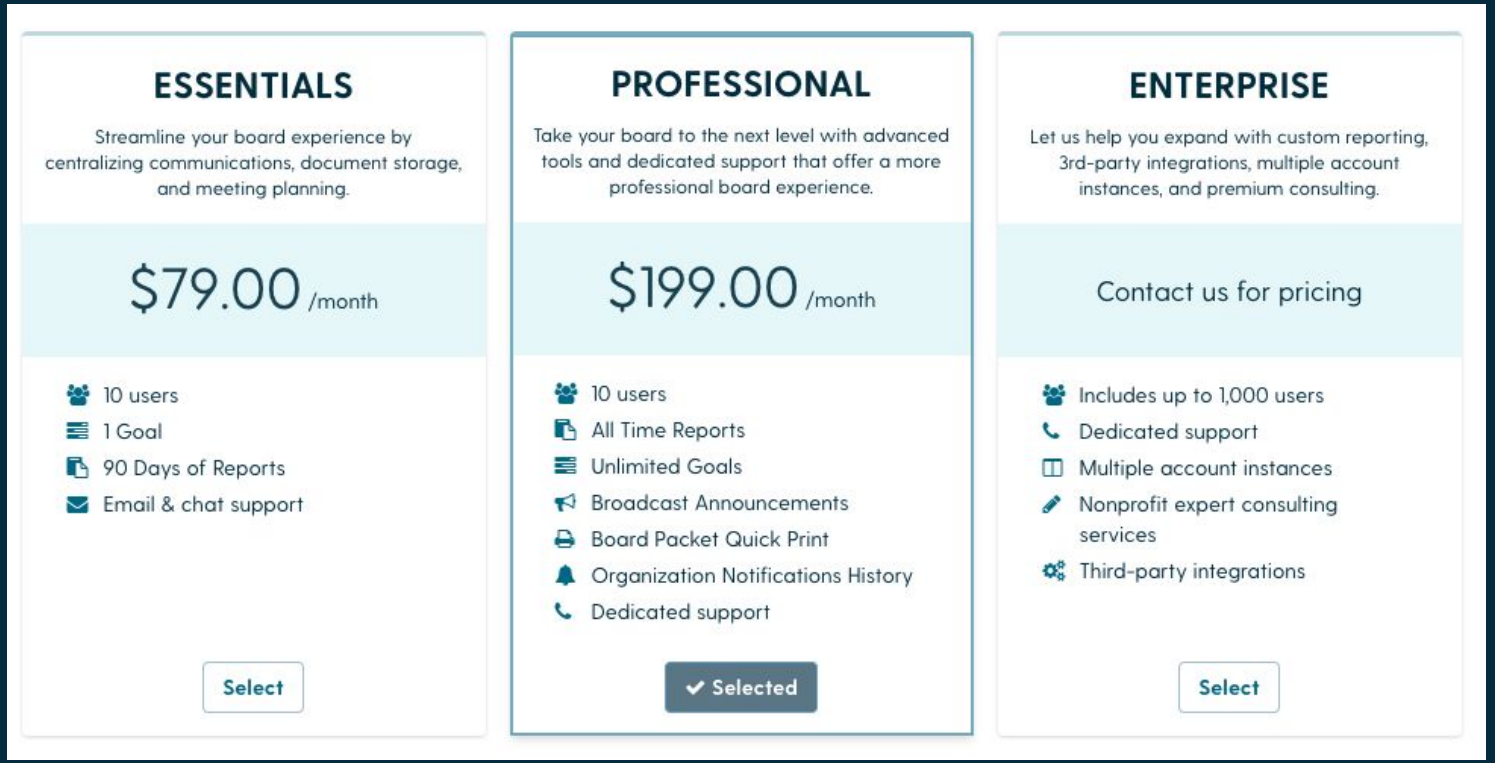
Board Packet Quick Print

- 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





Boardable Pricing



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
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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

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