Transcription

Boardable Admin Training Webinar - September 2020

Laura: Good afternoon and thanks so much for joining us. My name is Laura Clark and I am a customer success manager here at Boardable as well as a co-founder. And we are excited to have you all for our beginning admin webinar training today. I also have Samantha Alarie-Leca, with me who is our director of customer success here at Boardable. And then we have Michelle Mullen, who is helping us out as a chat moderator on the backend.

And so anyway, very thankful that you've taken some time out of your schedule to join us this afternoon and we hope that we will get you all comfortable being an admin in your Boardable account. Sam, do you want to say hello.

Samantha: Just want to echo that. Thank you for joining us today on a Friday afternoon before a long weekend. We hope to make it worth your time in terms of getting everything set up quickly and getting you rolling on your Boardable account. We are going to be really focusing on the new admin experience today, running through the setup and looking at how to get you going quickly. So if you're looking for some more advanced questions, we do have the Q&A period at the end as well. Thank you again for joining us.

Laura: All right, we are going to go ahead and turn off our cameras and we will get started on doing some slides first, and then we'll jump into the platform. We do have some trainings coming up that we want to just make sure to point out. We will be having a new user training webinar that's going to be next Friday afternoon at 2:00. And that would be a great resource for any of your new board members that would be joining on as users on the platform. Not necessarily admins, just users. So that would be a great start for them to learn how they can really use the platform.

We also are going to be having a virtual customer coffee coming up on September 15th. We really like to get our customers together virtually as often as we can so that you all can have an opportunity to talk with one another, get ideas, resources from one another. So if that sounds of interest to you, please sign up and join us on the 15th.

And then we'll have an administrator advanced Q&A coming up on September 25th. And that is a great time for you to come back after this training and get some additional, more deep-dive information on the tools in the platform. So you'll be able to register for any of these by accessing our Boardable Academy tab within our website or within the platform.

Samantha: Just a quick note on our plans, we do have several options with Boardable. We have...If you joined us before January 2020, which this probably won't apply to too many of you on this call today. But we do have a legacy platform that we're looking to retire here soon. And in January of 2020, we rolled out our Essentials and Professional options. The Essentials is great for those of you who are really looking to streamline your board experience by centralizing communications, documents, storage, and meeting planning. It does come with the ability to set and track one goal, as well as the ability to export data from the previous three months.

The Professional plan is for those that are looking for advanced tools to really modernize the board experience. Comes along with unlimited goals and reports, board packet quick print, E-signature, a dedicated CSM, as well as a few other features that we'll highlight. So today, we are actually in the Professional platform. If you see a few features that you don't have access to but you'd like to gain access to, feel free to reach out and let us know we'd be happy to walk you through the options. But we do have a few options for you so you can really choose the plan that works best for your organization and your needs.

We are constantly making improvements and we really do value your feedback. So if there's things you'd like to see us improve, please do send that feedback our way. And based on that feedback, we make enhancements and

improvements to features. So here are a few feature updates of recent improvements that we've made. Freeform minutes and notes, you can now take freeform minutes. Drop in votes and attendance and that comes with the Essential and Professional plan.

Boardable Meetings with Video is in beta, but we are very excited about it. It is available in the Essentials and Professional plan. The limit for the moment is 15 users in the Boardable virtual boardroom. You can now incorporate video conferencing within the meeting. There is no need for a third-party service. It comes with a new Grid View which if you've tested the feature before, you should now see a Grid View and this as well, again, Essential and Professional.

And then coming soon a little bit of a sneak peek, we have the recording option for the Professional plan with Boardable video conferencing. And collaborative files, linking to your Google Drive documents and your OneDrive documents in the Document Center, that's coming soon for all plans. And as always, you can check for our detailed release notes in the Help Center if you'd like more detail technical walkthrough of some of those new features.

Laura; Sorry, Sam and I are in two separate locations as we all work remotely so we beg your forgiveness as sometimes we trip on each other a little bit. But anyway so getting started we do have some success tips for you that we want to be sure to point out and let you know about that will really help you get your account going. So you're going to want to make sure you upload your logo in your account so that it is personalized to your organization. And we'll show you how to do all of these things in the platform.

Secondly, it's super important that you set up your groups and/or committees so that once you add those users, you're able to assign them to the group. Third, you're going to enter your users in the People Directory. Next, you're going to want to talk about Boardable as often as possible to your board, let them know it's coming. We do you have a welcome email template, we're happy to share with you that you can send out from yourself to your board in advance of sending out those welcome invites so they have a little better understanding of it. And also, will know where to look and when to look for that welcome invite. And then finally, you're going to want to send out that welcome invite so they can start setting up their accounts.

We also too have...want to make sure we point out that there are user permissions within the Boardable platform. There are three different ones. The first is going to be a member. A member is able to create meetings, polls, discussions, they can upload documents and view all the activity in their assigned group. Administrators, which is what you are, you can see and do

everything in the platform. You're going to be able to see all of your billing information, make adjustments to your plan if you need to, you're going to be able to add people, delete people, change account settings, and update any sort of announcements.

And finally, we do have an observer permission it's not as commonly used, but it is available. An observer can participate in groups' discussions and polls really of anything that they are invited to. The primary difference is they're not able to see the Document Center within the platform. So we'll walk you through that Document Center so you know what it is. But that is going to be your primary difference between the observer and the member.

If you need any help, you can always reach out to us at support@boardable.com. But we also have a wonderful Help Center that we'll show you in the platform and you can search by article. We also have our Boardable Academy which we hope you've already visited. But you can access that through the platform or on our website and it has a lot of tutorials for you and admin on how to get things going in your account. And we also have live chat within the product and we'll show you that we man Monday through Friday 9 to 5 Eastern time. So those are all great ways you can get in touch with us. If you need any additional help after this. We are going to go ahead and share our screens with you and jump into the platform so we can start going through the portal.

Samantha: So I am now in the Boardable account. And when you log in, and this is going to be the same for your users, you're going to have your main dashboard, and then an activity snapshot, as well as this dashboard message. And there are a number of things that you can customize in your account and your account settings. The dashboard message is something that the administrator can set up for the account. It's one dashboard message for everyone in your account. We do suggest that you put a little welcome message there. Give a little bit of context for why you're using Boardable, who the best liaison to reach out to is if they have any, if any of your users have questions. And that's something that you can update periodically as well with links to announcements about your organization, for example

Each individual user is going to see their unique dashboard view with their tasks, any signatures that they have pending, their upcoming meetings. So outside of the dashboard in this top area, the rest is a unique view per user.

As mentioned as an administrator you do have the ability to customize some of those settings and that dashboard message. The way you can do that is by accessing the settings over on this left-hand menu. That's going to take you to

the organization settings area of your portal, again, an admin-only feature. Here you'll be able to set that message, customize your organization info, including the organization name for your account, the email from name. Typically, we might see somebody put an individual's name here, or something to help it stand out from the other emails that they may be getting from your organization. The default is going to be the hello@boardable.com. So this is something you can customize for your board.

And then your logo. Once you update your logo here, as Laura mentioned, we do suggest you do that right away. This is then going to populate to your minutes and other things throughout the portal. As well as your board members when they log in, are going to have that nice branded view of your portal. So here is the Boardable logo but if you put your logo here, your logo is going to show up in that view.

User Settings. The default timezone can be set, can also be customized on an individual level as well. Content Settings, we have different list styles that you can choose from if you have a preferred bullet type for your agendas. Again, that can be overridden at the individual meeting level, but you can select a default for the platform. And then this is your Agenda Template library where you can build out agenda templates for future use throughout your portal.

Next, I'm going to go over to the People Directory . Boardable is really built to help you organize people and meetings. So getting this People Directory built out is going to be one of your first important tasks as an administrator. This is your evergreen directory where you can keep your living roster of your members. There are different views that you can expand, and it's going to be a great place for your board members to go and to be able to contact one another with that contact information, see what committees people serve on. And just have a good way to have visibility into the other volunteers they're working with.

I'm going to go ahead and point out a few features on the individual profile level. If I were to click into this profile to edit it, these are some of the features that you can...or some of the settings that you could set in advance for your board members profile. You can select a role, a board term, job title, company, about, put their bio there. You can add a profile picture, contact, and social. This is that great contact information that was public-facing in the portal and that evergreen directory. And just do like to point out that this contact email address is different than the login email address. And I'll show you that login email and how you set that in a moment.

But this is that email that they want other users to see and to use to contact them. Phone number, we have social media links as well. You also do have this private section so if there's things you'd like to track that you don't want other users in the portal to see, perhaps birth date or home address, you do have the ability to capture private information.

Notifications, a really important note here is just to really confirm, and to emphasize with your board members, they will need to choose either immediately or periodically for notifications to make sure that they're receiving notifications, meeting updates from the portal. If they choose do not send email notifications they're going to have to be logging into the portal very regularly to be able to see anything that's happening. So just double check that they have chosen immediately or periodically.

Additional email addresses for notifications. This is a great place to put an email that you would like to have copy. So anything that you want cced, any email that you would like to receive a duplicate of the notification emails that are going out from the port. So a great example here is if one of your board members has an admin assistant, for example, you might put their email address here. They won't be able to log in with that email address but they would get a copy of the notifications. Customized meeting reminders and when they go out. And this is where you would set that account-level role of member, observer, or administrator. It's very easy to adjust afterwards as well if you need to make an adjustment there.

Most of Boardable is organized around groups. So once you have added your people, you can go ahead and add your groups. Or you could add your groups first and then as you're going in and adding your people, you'll be able to check off which groups you'd like them to be a part of. Can always go back and make adjustments again after the fact if needed.

I'm going to go back over to the main directory and just point out a few more things. So when you're looking to add somebody that first time, it's right over here that Add Someone button. And it goes through all those steps that we just mentioned, including the adding their first name, last name, and email address. So that's where you're going to set that login email address. When you add them not to worry, they will not receive an email invitation until you send them an invitation, or they won't know that they've been added until you proactively send them that invitation. So you can get everything set up and then choose to press Send.

Going back here, a couple more things you can export the People Directory on the right-hand navigation menu. And that's going to export a CSV of all of your

information in the People Directory. So that's a really nice report that you can generate. As well if you need to resend an invitation, say somebody just didn't see it or they missed it, you can always click on an individual and then choose to send that invitation again, or to copy that invitation link and to resend it. Or you can press here to resend unaccepted invitations or just send them for the first time by pressing Send here. When you do that, you're going to get a little pop-up, you can customize that welcome message that they're going to see with that email.

Okay, last thing to point out in the People Directory is just that activity, you can sort by oldest to newest, as well as you can sort by last name. So this is just a nice...you can see who has had the invitation delivered. And if there's anybody who hasn't logged in a while, that's just a nice reference point for you.

My Groups, I mentioned those, this my group area over here, that's going to be where an individual can see which groups they particularly are assigned to. And then there's also this group section here which shows you all of the groups in the portal. And this is where as an account administrator, you can go to add a group. It works just the same very similarly to adding an individual. You would set a name, you will give it a group owner, and you can have just one group owner per group. That's going to be the person whose name shows up at the top of the group page. You can set a description, and then you can choose your people. I'm going to add Jeff, and I'm going to add Mabel. And then I will give this a test group name. And I'm going to go ahead and go down and press Save.

And now I've created a group that I can add meetings to, polls, documents. This is the landing page for your group. And you can see here that I'm listed as the group owner. And, again, there can be one group owner but you can add additional group administrators. If you have co-chairs that you would like to help administer that group, you would simply check by their name at the bottom of the member information page of the group. So I'm going to go ahead now and pass it over to Laura, who's going to jump into the heart of the Boardable platform, which is our minutes suite.

Laura: So we're going to head on over to the meetings tab also called the Meetings Center, and we're going to walk through creating the meeting, I'll show you the different options there. And then setting up your meetings. So when you're ready to add a meeting, first of all, you're going to see all of your published meetings here, all of your unpublished meetings on this tab, which we'll talk about the difference between those two in a minute. And finally, you're going to see all of the past meetings on this tab.

And then to create a meeting, it's simply in this upper right-hand corner, Add Meeting and it will give us the option to create that meeting. If I know the date, I can simply type that in here. We do also have a meeting scheduler tool that you can use if you want to give several different date options. We won't go into detail on how to do that. But it's very simple and we also have tutorials on our Boardable Academy if you're interested in that. But it's a great way to give date options and find the one that works best for the most.

The next option is to create a recurring meeting. And this would be, for example, if you have a meeting, that's the first Monday of every month, you could set it up here. But for today, we're going to set up a meeting as though we know the date. So I'll go ahead and we're going to choose this in October, we give it a time. I go ahead and give it a title. If I am having it at a physical location, I can go ahead and drop in that location. I also can choose here if I'd like to add a remote option. You can use the Boardable video conference or if you choose to use a third-party link such as Zoom or something like that, you can drop that code in here.

Today we're going to focus on that Boardable video conference. You then have the option of choosing whether you want to use our Classic Minutes Maker, or whether you want to use our freeform minutes in notes. Today, we're going to use our Classic Minutes Maker. Below that, you can assign it to the groups. So we're going to go ahead and assign this to our board of directors. We can assign any other individuals who may be a user on the platform, but not a part of this group, I can add them. I also have the ability here to add a guest if I'd like to do that. And that would allow them if I'm using the Boardable video conferencing, I can send out the link for the Boardable video conferencing directly from this.

Let's go ahead and add a guest here. You can see how that works. We're going to click Save and Continue and it's going to create our meeting. It'll open up on the meeting page and at the top, you're going to see this box at the top. And what that's telling you is that your meeting has not been published yet. The reason for this is that it allows you as an admin or meeting creator to go in, get your meetings set up before others can access the page.

However, if you do want to send out a calendar email for them so they can get it on their calendar, I can do Publish Calendar Only. I can jot a quick note if I'd like to, I can choose whether I want to send it just to collaborators. Which I'll show you here in a second what those are or if I want to send to all invited users, I can hit Publish, it's going to send out an email notification to them where they are able to RSVP and get this meeting on their calendar. When you're ready and you have your meeting completely set up and ready to go, you can go ahead and Publish Full Meeting.

And again, I can choose who I'd like this notification to go to. I'm going to choose all invited users, Publish. And it publishes the meeting and allows one of these members if they chose to come into their Boardable account, they would be able to access this meeting page now.

Let's talk a little bit about this top area. This is going to be all the basic information about the meeting. Your members also have the ability to add the meeting to their calendar here. They could have done that as well on their meeting notification that they received in their email, but they would be able to place it here on their calendar if they chose to do so. Or Boardable does have the ability to integrate or sync with your personal calendar. So your board member could choose this integrate your calendar it will take them to their personal settings and they can set that up. They can RSVP here if they've not already done so.

Now let's start walking through the rest of the meeting. When I'm ready to build an agenda as an admin, I can go ahead and click Build Agenda. I can either choose to start from scratch or start with a template. Today, we'll start with a template because you can always customize every part of the agenda that you're putting together. So if we wanted to make any changes to this area we could do so. I could assign a person who's responsible, I could give it a time limit, a description. I'm also able to upload a document if I'd like to do so. Give me just a second and we'll get to that spot. Oops, get to my demo doc sorry, I didn't have this open.

All right, so we'll open those up, we'll grab a couple of documents, so that we can put those in our meeting. I can choose these upload these to agenda and it's going to place them in the center. Once this area is completed, I can click Save and that area of the agenda is done. I can then walk through and make any changes that I'd like to make to the agenda to get it just like I'd like it to be.

A couple of things to point out we do have a time tracker here. So as you go through the meeting, you'll notice that it tracks the time or where you should be based on the start of your meeting. You also can save a template. So if you create this and oftentimes your board meetings have a similar agenda, you can save this as a time template, and the next time, you can just update it as you need to.

Let's go back to our meeting page so that you can see where this sits in the meeting. So on the meeting page, you'll see here that the agenda is sitting here you can open the agenda, your board members will also be able to do this. It will open as a separate tab. And they're able to walk through they can take

personal notes, if they'd like to do that. Add note and those notes are going to be stored in them for them personally. You'll also see that those documents that were in the agenda are sitting right here.

We do as well have our Board Packet builder so if you need to do that as an admin, you can create that board packet for your board, you can type Quick Print. I'm sorry, not type you can hit Quick Print and it will print that for you. You also would have the ability to open that board packet here. And it's generating that PDF file for you of all of those together. So it puts in your agenda and then all of those documents that you've uploaded will be right under it.

All right, this is the poll section if you'd like to take a poll during a meeting, you can do that. You're able to go ahead and add a poll, click Add Poll. You can type in a question. Oftentimes, it's used to approve minutes. You can attach a file if you'd like to do that. You give your options answer options, so we'll say yes or no. We can then choose whether your member needs to verify their identity or if they'd like to keep their votes anonymous. Today, we're going to choose that they would keep their votes anonymous.

If you ask them to verify their identity, they'll need to enter their password to cast their vote. We do need to give this a due date and choose a time. And then it automatically assigned this to our board because it was associated with this board group meeting. So we'll click Save, and it's going to create a poll for us. You'll also notice on a poll, it has to be published just like a meeting. So I can hit Publish Poll, I can send out a notification if I'd like to. But I'll publish that poll and then that poll is created. And you can see here the poll is created. I can vote I'm a member of this meeting so I can vote, click Submit. And it's going to start to show those results.

All right, let's go back to that meeting page and I'll show you where that poll sits in the meeting page. So here's our meeting, and then you'll see the poll is sitting right here. I've answered mine so it's telling me that it's answered. Below that our supplemental documents area and this is going to be if you happen to have any documents you'd like to upload to the meeting that may not be a part of the agenda, but yet you want them associated with the meeting. We do also integrate with Dropbox, Google Drive, and OneDrive, you also can pull a document over from the Document Center. You can add a task to a meeting so you'd be able to click Task, you're able to go ahead and choose let's see, decide what the task is, go ahead and give it a due date.

And then I can assign it to an entire group, or I can choose specific individuals. I click Save, all of those individuals will be notified that they have been

assigned to this task. As an admin, I'm going to be able to start seeing those tasks completed. Once they're done, they're able to click, they've completed the task, and I as an admin, I'm going to be notified that I have completed that task. Below that you're going to see everyone who has been invited to the meeting, all their names will be here. You'll also see their RSVP start to populate here as they answer. As an admin, you are able to come in and answer for them should you need to do that. This is also the spot where you would take attendance during the meeting. You can also do it in minutes and we'll show you that in just a second.

This collaborator field, when a meeting is created, the only permission level that is able to publish a meeting is either going to be the meeting creator. So if I happen to be a member and I create the meeting, I'm going to be able to publish it. But if I didn't create the meeting, only an admin or a group admin or a collaborator is going to be able to publish or add things to the agenda or add things to the minutes.

So if you have someone for just one particular meeting that you would like to have that permission, you can make them a collaborator. They'll receive an email letting them know that they've been made a collaborator and they're able to come back into the platform before you've published the meeting and help you get it all setup. Below that, you're going to see comments. So if anyone has any comments they want to add, they can be entered here, and they will show up on the meeting page for everyone.

Okay, we have talked about the agenda. A couple of other things on the right-hand side, I'll show you before we talk about our Boardable video conferencing. You can send a message to everyone if you need to do that by hitting Send Message. This can be a very handy tool you can do it sometimes if you need to encourage people to RSVP. You can choose everyone, you can choose specific individuals if you choose to do that. And I would be able to uncheck those that I do not want to receive it. I also can choose if I want to send out the attached agenda as a PDF. So I would have that option here as well.

You can choose to create a follow-up meeting if you want to do that and that's going to pull everyone who's invited to this meeting to the next meetings list of attendees. It's also going to attach a copy of this agenda on that next meeting. So you can keep a record of all those things in a continued meeting set series.

We also have a public page if you need to allow, for example, the public to have access to your agenda, or you need to post this on your organization website, you can enable your public page. Choose what parts you'd like to have associated with it, click Save, it's going to create that URL, you're able to copy

that. And if I open a separate tab, and I paste that in here and open this up, you'll see that it creates the agenda. And anyone who needed to access this, they would be able to see the agenda and the basic details for the meeting.

Let's head back to our meeting page. All right, let's go ahead and talk about you can take minutes from here. I would click into this and it would open up my agenda and I can take the minutes from there or I can do a freeform. I'm actually going to show you that in our Boardable video conferencing because it is the same experience. So if our organization wanted to use our new beta video conferencing, I could click here and it's going to take me to what we're calling our virtual boardroom. I would request access. Your members will need to allow their camera and their microphone to be used. But it's going to go ahead and give me the option of joining the meeting, which I'll do and you'll see that I am showing up on the screen now.

All the other participants of the meeting would also show up here, their video would show up. We also have the ability to do GridView if you choose to do that. Obviously, if there were more people here, you would see that they were all populating here as well. On the left-hand side, you're going to see the agenda shows up right here on the screen. So your board members are able to see everyone who's in the meeting and the agenda and everything they would need for the meeting all in one spot.

They can click directly into a document from right here, and that document would show. If I happen to be the one presenting on this section of the agenda I would be able to share my screen with everyone or present the document. You're not able to see this here but other people on the call would see that populate right here in the middle. We'll come back to our agenda.

The next area down is going to be that minutes. If I want to take minutes, I can do that right here within the Boardable video conferencing experience. I can click Take Minutes. Oops, oh, it took me back. I chose the classic minutes maker so it's taking me back for that meeting. I'll show you that here in a second how you can do it within a Boardable video conferencing. We'll show you that in just a second. The next area you'll see documents, you could see any of the documents here that are associated with the meeting there is a chat option as well.

Below you're going to see the ability to raise hands, control your microphone, control your camera. Currently, it's not live in the platform yet, but recording is coming very soon. So you'll see that in your platform very soon, you also can share your screen from here as well. So that's going to be our Boardable video conferencing experience a couple of things to point out about it. Currently, you

need to only have 15 users on a call. And you also all need to be calling in from a Chrome browser for the best experience. It is in beta and we're working on improving all of that so that it will have more users on more browsers. But for the moment, that's what we're suggesting for the best experience for everyone.

All right, let's go back to our meeting page. I'll show you quickly. This is that classic minutes view and you would be able to populate it. Our agenda if you remember this is the agenda that we created. And you're able to come in here and take your minutes and decide whether it's a note, a decision, or a task, and create that field. So that's going to be the Classic minutes maker. Let's head back to our meeting page. All right, so I think we have talked about everything on our meeting page. If you have additional questions about the meeting...I know I always feel like this is a whole lot of information about the meetings that we kind of throw at you. But please feel free to chat those questions that you have and we will definitely come back and cover those.

In the meantime, though, let me show you that video conferencing minutes taking experience. We'll pop into a different meeting. And I will be able to join the video call just like we did on the other one. Join meeting, and if I choose to...this one is as well we chose to take the classic minutes, but it would open up the area here and you could quickly jump in there and take minutes for the meeting. We also too...another thing to point out is that when we have our admin advanced training webinar coming up in a couple of weeks, we will also be really diving into not the agenda and the minutes' builder so that we can really answer all questions or really show you that in more detail. All right, I think Sam now is going to talk to us all about the Document Center.

Samantha: Wonderful, I'm going to go ahead and share my screen and I'm just going to do a quick run-through of the Documents Center. And the administrator really has that ability to organize the Document Center and you have unlimited folders, unlimited storage, unlimited subfolders. Within the Documents Center as the administrator, you're going to be able to move those folders around into the order that you'd like for the default view.

You can set permissions in terms of limiting the visibility to the folders. So for example, we can see here this one has a little locked icon that's because I've already gone in and I've limited it to the executive committee. Suppose that I also wanted the executive planning committee to have access to that I could add them. If I wanted everybody I would say everybody, and then that little luck goes away.

Now, if you are organizing Boardable by your groups, and you have somebody who is not a part of this Finance Committee, which is a locked folder, they are

not even going to see this folder that it exists. Let's go ahead and pop into a folder. You can again have unlimited folders, unlimited subfolders, you can drag and drop multiple documents into the Document Center. The Document Center really is your library for your standing final versions of documents.

Very quickly, the E-signatures is available for administrators in the Professional account to add documents to sign and to collect signatures. I won't go into detail on that today, just because we're coming close to our time here and I do want to save time for Q&A. But know that it is a feature that's available for you to send out a document for signatures. You would be able to see all that have been completed, and all that are still pending signatures. And again, your users see that on their dashboard, the ones that face specifically only need to still sign. So that was a crash course of our Document Center.

One last thing is that there is the ability to store documents and that's an individual setting. So your users do have the ability to store documents as well, kind of favorite documents, and they can filter for just those star documents that they really need to reference quickly.

All right, and the last thing, I won't go into detail, but I just want to point it out is reports. And this is where if you are tracking attendance, taking minutes, assigning tasks, you're really going to be able to track your governance lifecycle, look back over the past 90 days if you're on the Essentials account. That whole yearly cycle, if you are on the Professional account, you're going to be able to generate reports for people, polls, meetings, and goals. And with that member report, for example, to be able to drill down to the group level and see okay for that executive committee who's the rooster there? And that comes from your People Directory it's your exportable committee view. What tasks have individuals completed? What's the attendance look like?

So if you have a board commitment that includes committee service, you can look there are they fulfilling that committee service as well. All righty, that was a very quick overview of reports. And the last feature we haven't mentioned yet is just the goals feature. This is your goals dashboard, where you can really set and track goals. I won't go through it today in detail if you want that detailed walkthrough, go...please do attend our advanced Q&A, as well as there are some great tutorials on this on our Boardable Academy.

But on the Essentials plan, you can create and track one goal for your entire portal. And on the Professional plan, you have the ability to set and track unlimited goals, as well as to assign them down to the group level. So this can be really great for working committees, as well as many organizations I see create visibility around their strategic results, their strategic plan, keep that a

living, visible breathing, set of results that are front and center. On that dashboard view when your members are logging in they're just going to see that visual of whether or not you're on track with your goals. Okay, so that was our quick tour of Boardable and now we would like to entertain some questions.

Laura: Absolutely, I did see one, Sam that maybe we can jump into since you're already sharing your screen if you wouldn't mind, jumping back to that October 14th meeting about publishing minutes. And we can also jump in into...we got it corrected so that you can see us take minutes with our new freeform maker in the video tool. So, you could go ahead and open up our video conferencing and you'll see once we're on that page, you're going to be able to open up those minutes and you could take minutes. There we go, great.

So she would be had the option here of whether we wanted to start from the agenda or whether we wanted to start from scratch. But it's going to go ahead and create those minutes there. You can click on that little plus sign on the far left, and you're able to choose different things to add. It looks like we're adding attendance right now and you can go through and mark for each person in the meeting present, not present. You also can do add a task, you can add a decision. You're also able to take a vote right here in minutes which is very exciting, I think to really capture that vote right there within the minutes. We've got that task created and you're able to take those votes there should you need to do that and take any notes that might be associated with it.

So yeah, once you have created your minutes, you can go back to your meeting page and your minutes are created. You always can go back in and edit those minutes if you need to do so you're able to do that. The publishing of minutes...There was a question, Sam, about how do you publish minutes? So your minutes are going to be there and you're able to go in and edit them as you need to. They're done when you decide that they're done. I think Sam's opening up those minutes for us.

Once you have those minutes created, you're able to download them as a PDF once they're in their approved state. And then our suggestion for best practice is that you then upload those approved minutes to a minutes folder within your Document Center. So you always have a copy of those approved minutes. Sam showing you how we can open that as a PDF if you'd like to do that. Anything to add to that, Sam?

Samantha: No, I think that covered that. Great job narrating as I was kind of scrolling around here and there, appreciate that. Just the last thing is that in a meeting, you can also...once the meeting is complete, you'll see a little option over here, which we don't have yet but to create a meeting summary. And that's

where you can compile a PDF of your final version of the meeting, your agenda, your attendance, whatever you would like. And you can send that summary out as well to everyone who participated in a meeting, that can really be the signal that your meetings minutes are finished and the summary is finalized.

Laura: Great point I forgot to put in our meetings. One other thing too, I want to be sure that we covered is our Help Center, which you'll find on the left-hand side bottom of your screen. And if you have any questions, you can go to that and search by topic and pull up articles about that. We also do have our chat option in the bottom right-hand corner, you can click that to ask us any kind of question, or provide product feedback, we'll get right back to you. We do man that Monday through Friday 9 to 5 Eastern, if it's outside of that we'll respond as soon as we get back in the office.

As well as those two items on the left-hand side Sam, if you can just point out the Boardable tab. So if you have that you'd like, to look for a tutorial you can always access our Boardable Academy or feel free to reach out at anytime. We just thank you all for taking the time today to spend with us on a Friday afternoon learning a bit more of Boardable. Thank you for being here!