We will get started soon!

- Please enter your questions in the chat area throughout the webinar.

- Comments and questions will be addressed at the end.

- Try using Google Chrome or Mozilla browsers for best results.

- We will email a replay of the webinar in the next few days.

- For connectivity problems, try the "Reconnect" button at the top.

boardable

Upcoming Training Schedule

New User:
Training Webinar

—

- Friday, Sept. 11th at 2pm ET

- Mobile App and Web Portal for Boardable users

Virtual Customer Coffee

—

- Tuesday, Sept. 15th at 11:30am ET

- Join other administrative professionals for tips & tricks

Administrator Advanced Q&A

—

- Friday, Sept. 25th at 2pm ET

- Bring your questions and connect with other Adminstrators

Recordings available on demand in the Boardable Resource Library

Boardable Plans

LEGACY

—

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

- Plans before January 2020
- Original platform

ESSENTIALS

—

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

- Set and track 1 goal
- Export data from previous 3 months

PROFESSIONAL

—

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

- Unlimited goals & reports
- Board packet quick print
- E-signature
- Dedicated CSM `

Contact your dedicated CSM or success@boardable.com

boardable

Boardable Feature Updates

Freeform Minutes & Notes

—

- Take free form minutes
- Drop in votes and attendance
- Essential and Professional plans

Boardable Video Conferencing

—

- Incorporate video conferencing within meeting
- No need for 3rd party service
- Grid View
- Essential & Professional plans

Coming Soon:

—

- Recording in Boardable Video Conferencing
- Collaborative files in Document Center
- Essential and Professional plans

See our updated release notes for more information

GETTING STARTED
Success Tips

1. Upload your logo in your account

2. Set up your groups/committees

3. Enter your users in the people directory

4. Talk about Boardable as often as possible!

5. Send your welcome invites!

USER PERMISSIONS

Members
Create meetings, polls, discussions, upload documents, and view all activity in assigned groups.

Administrators
All privileges including billing information, ability to change plan type, adding people, account settings, and updating announcements.

Observers
Participate in groups, discussions, polls and meetings when invited, but they are never able to see the Document Center

boardable

Need Help?

- Search in the **Help Center** (new articles).

- Visit our [Boardable Academy](#) on our website.

- Send messages 9am- 5pm ET for live **Chat Support**.

- Email support@boardable.com at any time.