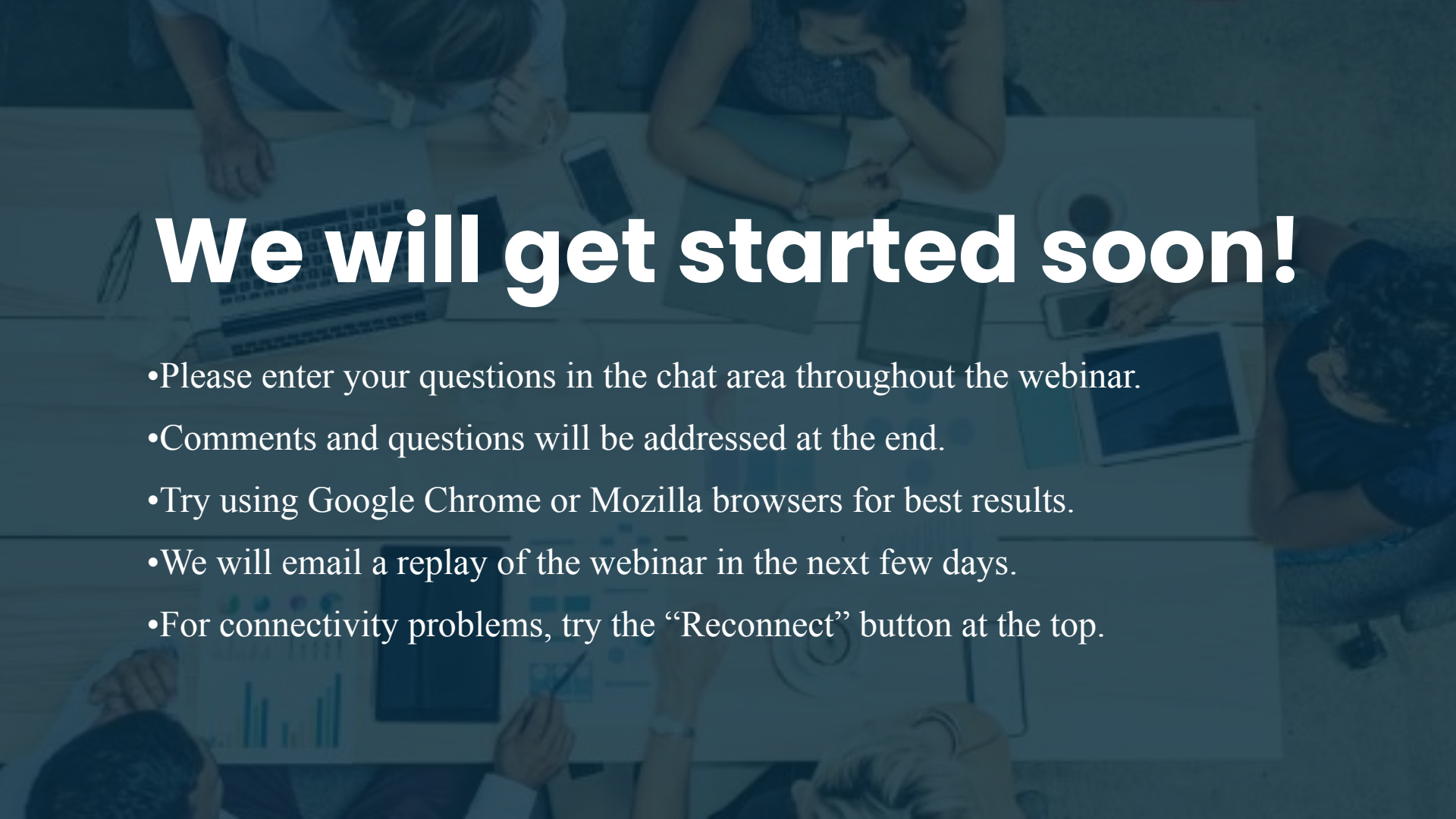


We will get started soon!

- 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

Board Meeting & Management Software

Boardable helps nonprofit leaders and the meetings they run be more organized, impactful, and fun.

boardable

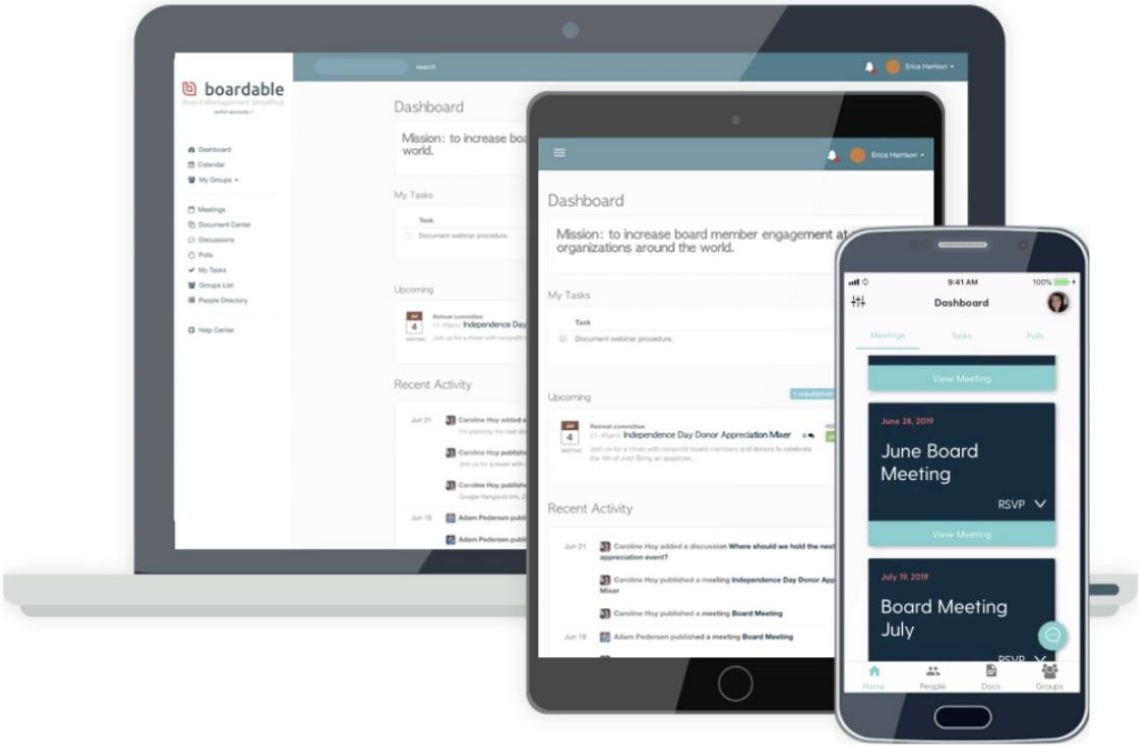
Agenda

- **Introductions**
- **Feature Overview**
- **Feature Training**
  - Goals, Reports, E-Signatures, Broadcast Announcements, Board Packet Quick Print, Notifications Log, Free-form Minutes Maker
  - Boardable Meetings with Video
- **Live Q&A**

Centralize activities for meetings, documents, discussions, polls, and contracts

Automate scheduling, calendaring, and reminders

Integrate with Gmail and Outlook as well as document services



Boardable Plans

LEGACY

Customers who joined Boardable before our current plan structure launched in January 2020

- Original platform, including meetings, polls, tasks, Document Center, and more

ESSENTIALS

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

- Set and track 1 goal
- Export data from previous 3 months
- Boardable Meeting with Video (Users Only)

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-Signatures
- Success Manager
- Boardable Meeting with Video (+Guest)

ENTERPRISE

Let us help you expand with custom features and consulting

- Custom reporting
- 3rd-party integrations
- Multiple account instances
- Nonprofit expert consulting

User Permissions

Administrators

All privileges including billing information, ability to change plan type, add people, change account settings, and update announcements.

Members

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

Observers

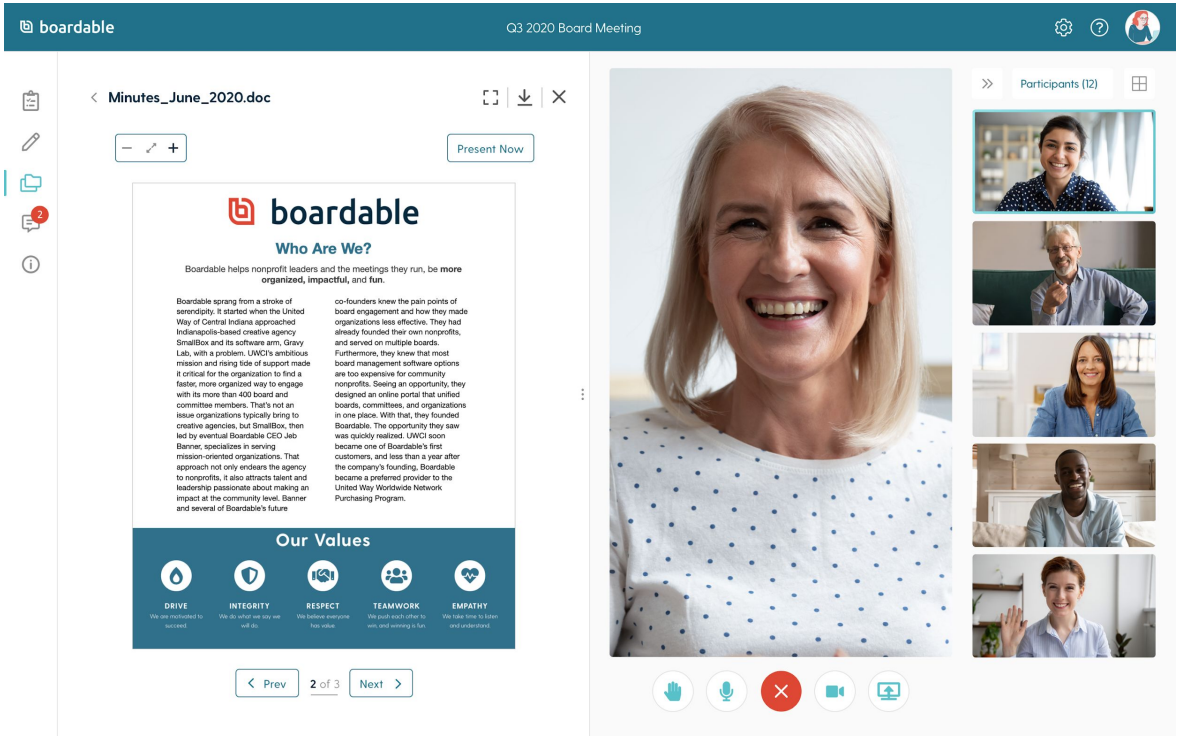
Participate in groups they are assigned to, discussions, polls, and meetings when invited, but are not able to see the Document Center.

Virtual Meetings with Boardable

- Meeting Center with Documents
- Public meeting page
- Task tracker tool
- Discussions
- Online voting via polls feature
- Convenient mobile app
- E-Signatures (Professional Only)
- Boardable Meeting with Video (Beta)

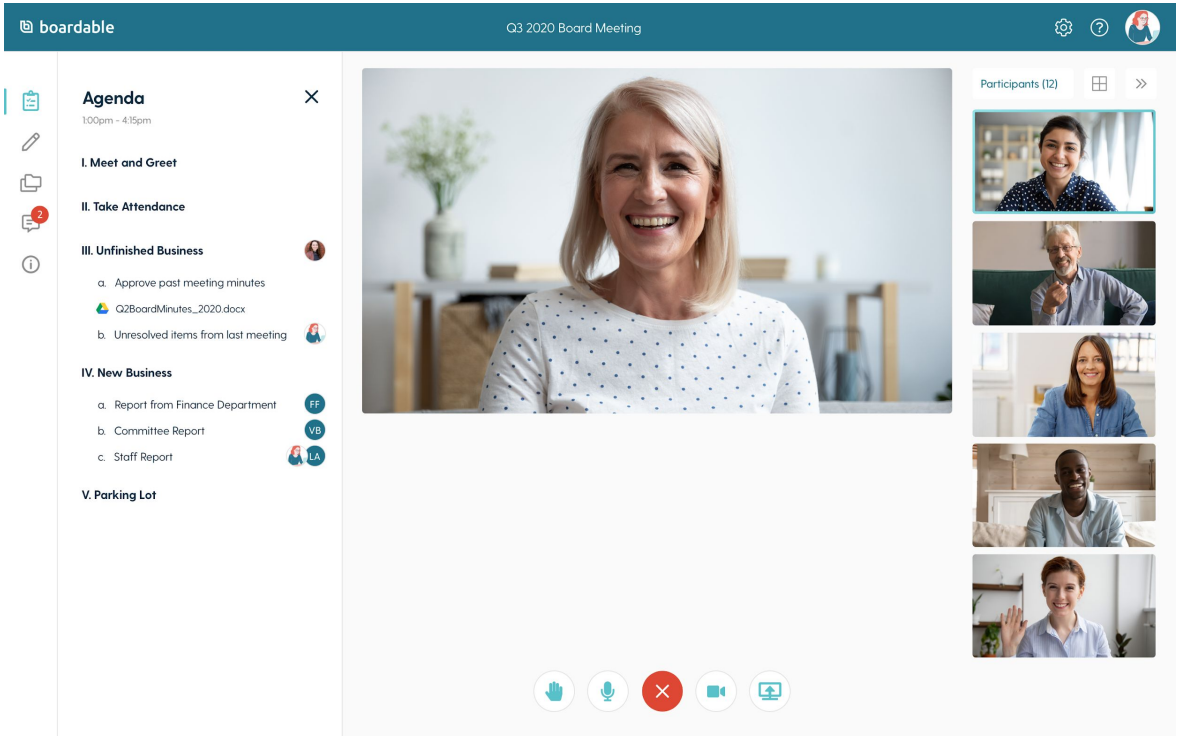
Boardable Meetings with Video

Whether you're meeting remotely, in-person, or a combination of the two, Boardable Meetings with Video gives your organization the tools needed to have a more focused and engaged meeting experience.



Boardable Meetings with Video

With the built-in agenda, your organization can move through the meeting while viewing the agenda, relevant meeting materials and video conference all within the Virtual Boardroom.



Boardable Meetings with Video
Will be available to organizations on the Essentials and Professional Plan.

Essentials

- Only Boardable users will have access to Boardable Meetings with Video.
- No guest access

Professional

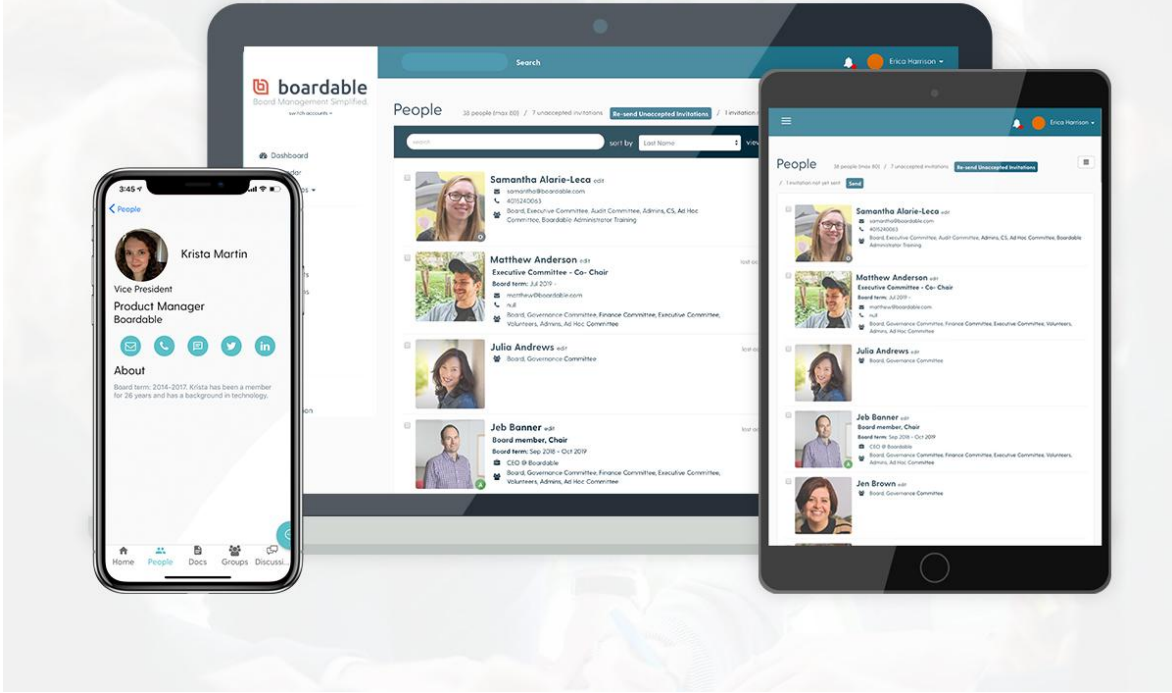
- Individuals without a Boardable user login can attend Boardable Meetings with Video.
- Guest access

Essential Features

boardable

Maximize Board Relationships & Connections

Get a Visual Overview of Your Organization at a Glance



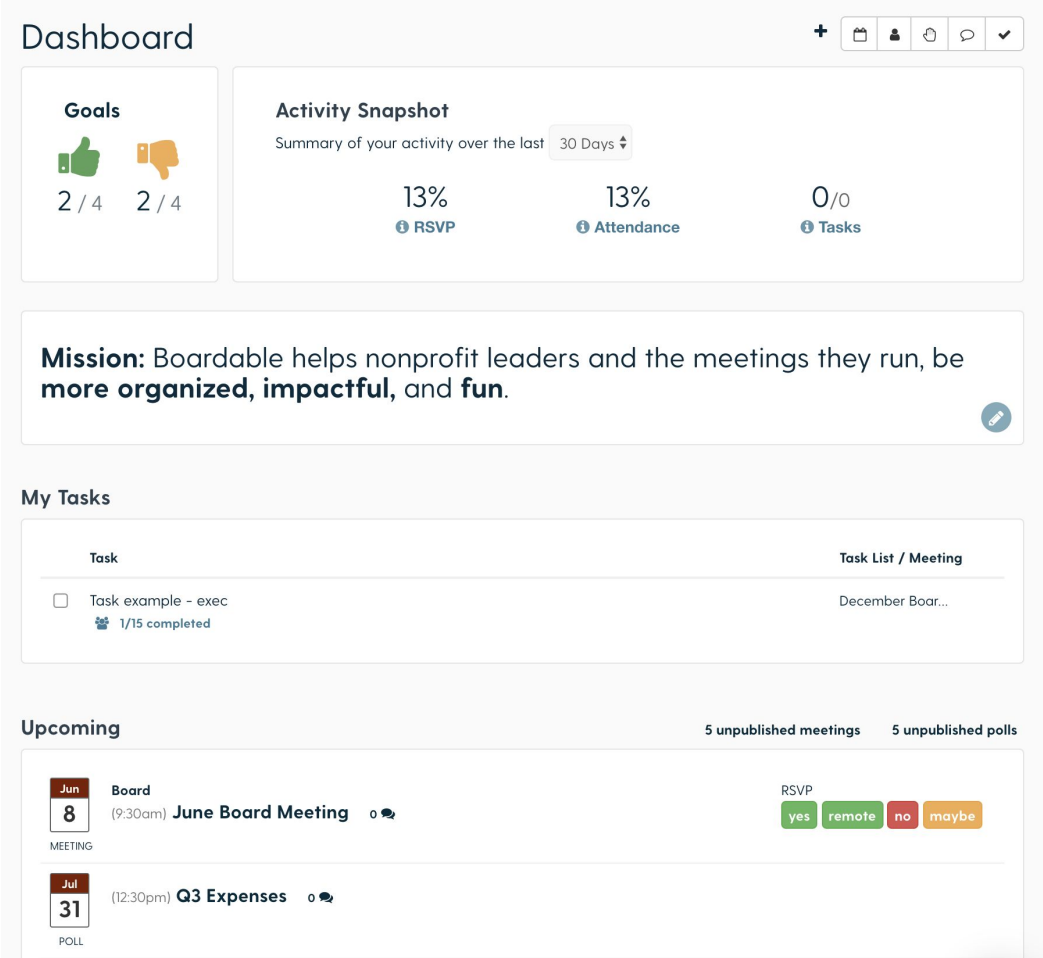
People Directory

See everyone in one place

Dashboard

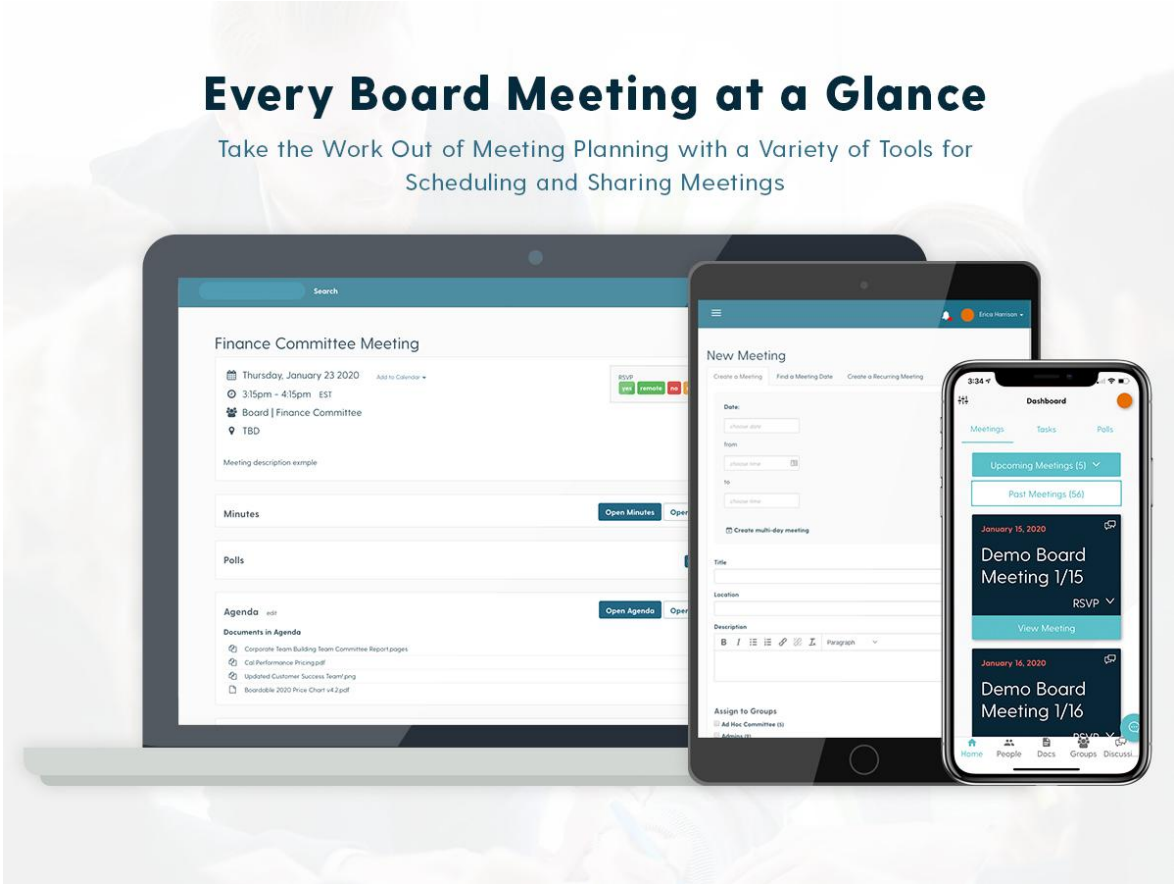
Everything in one place

- Announcements
- Quick RSVP
- Tasks
- Select availability
- Upcoming meetings
- Change RSVP
- Activity
- Notifications



Meetings Center

Administrators, meeting Collaborators, and Group Owners can create agendas, minutes, polls, send meeting messages, reserve dates by publishing to calendar only, or set the date and publish.



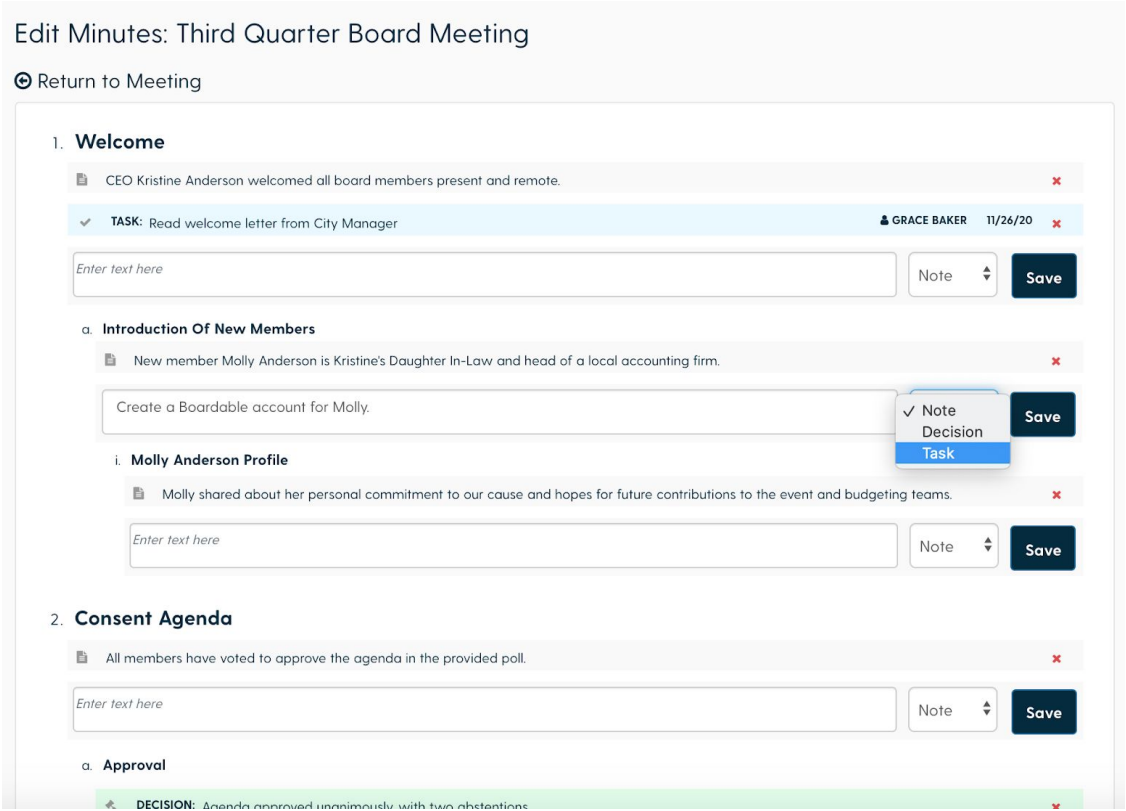
Agenda Builder

Create agenda templates, personal notes, export PDFs, share agenda on public meeting page

Minutes Maker

Record notes and decisions, assign tasks

Freeform and private notes also available.

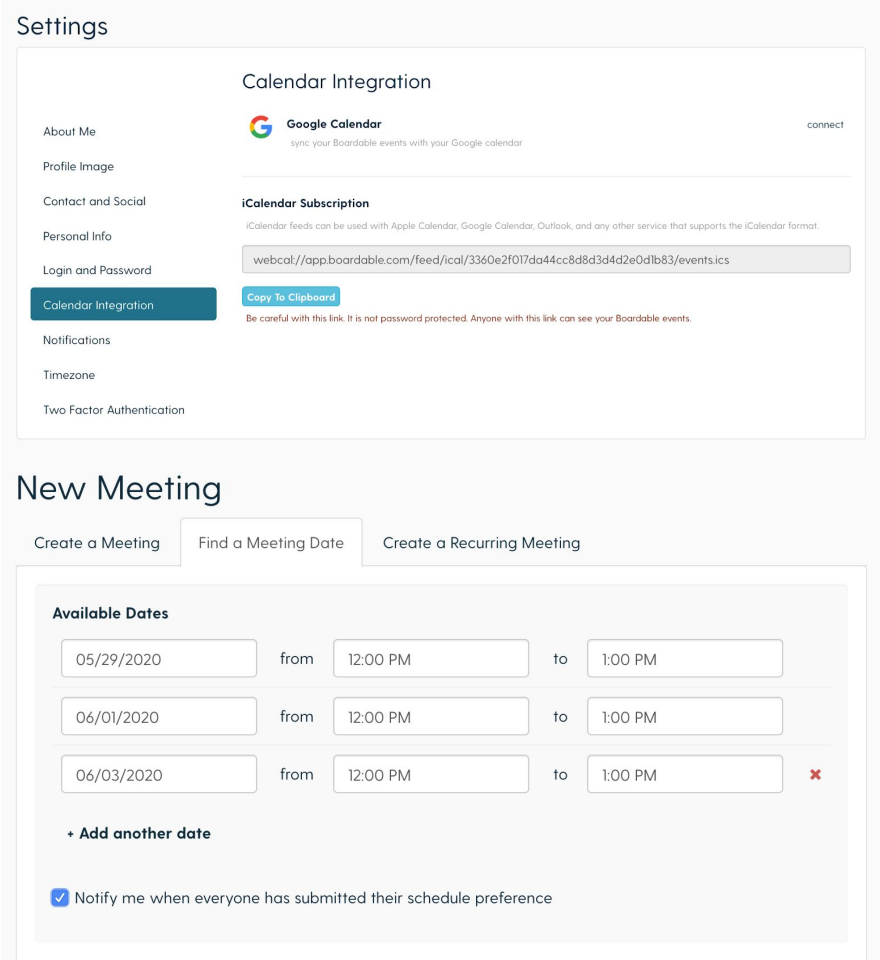


Calendar Integration

Connect your calendar and never miss a meeting

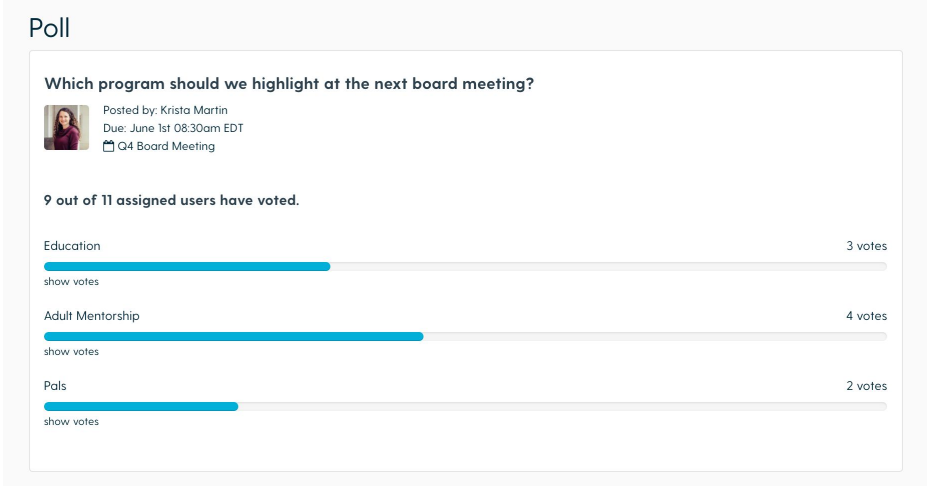
Meeting Scheduling Tool

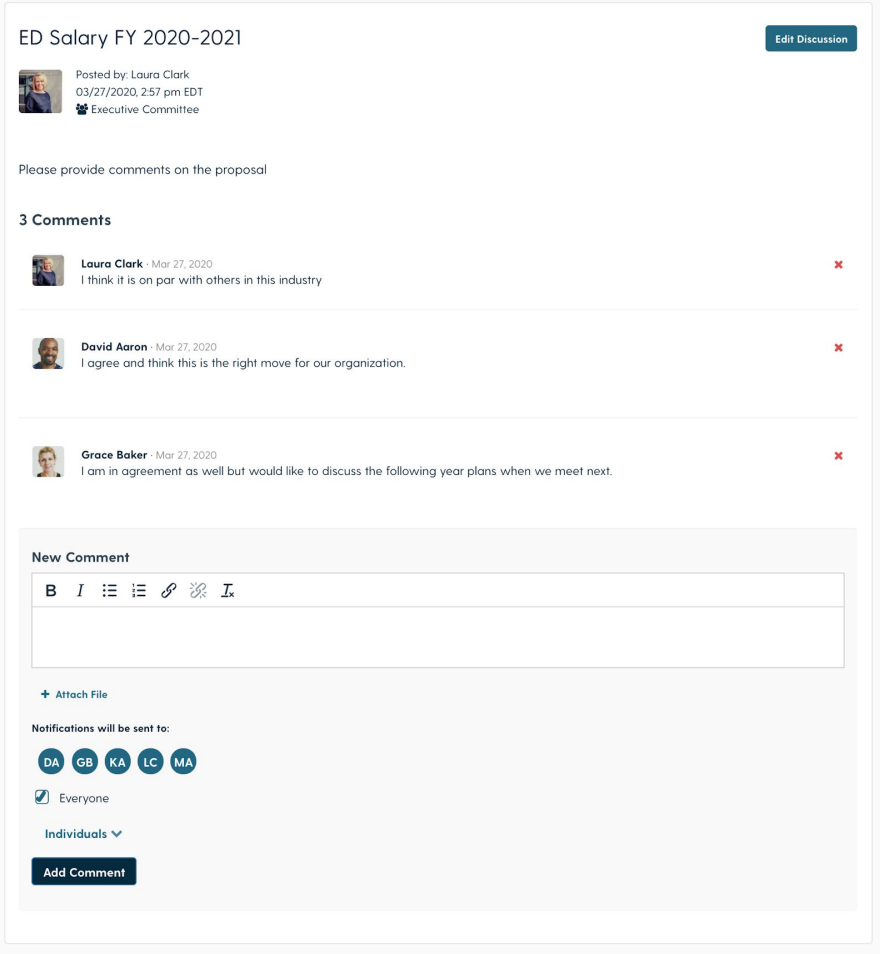
Find a date that works for everyone



Polls
Vote on important issues

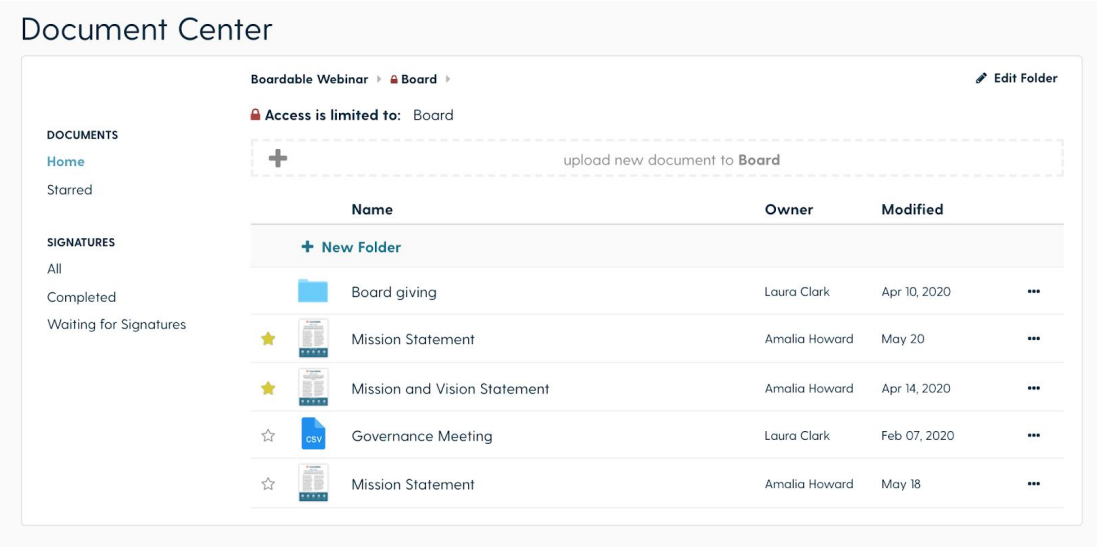
Discussions
Collaborate with board members





Document Center

Secure, accessible, and organized

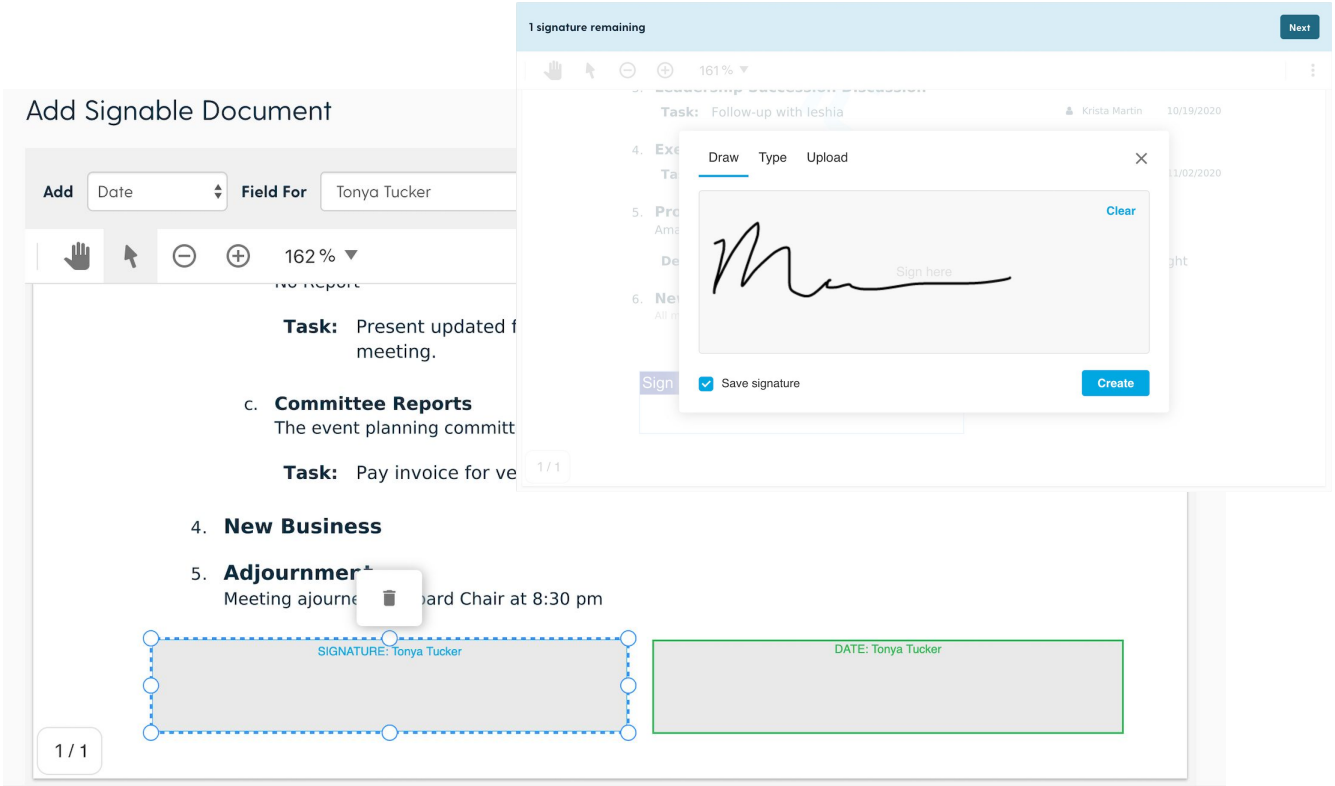


Professional Features

boardable

E-Signatures

Sign documents virtually



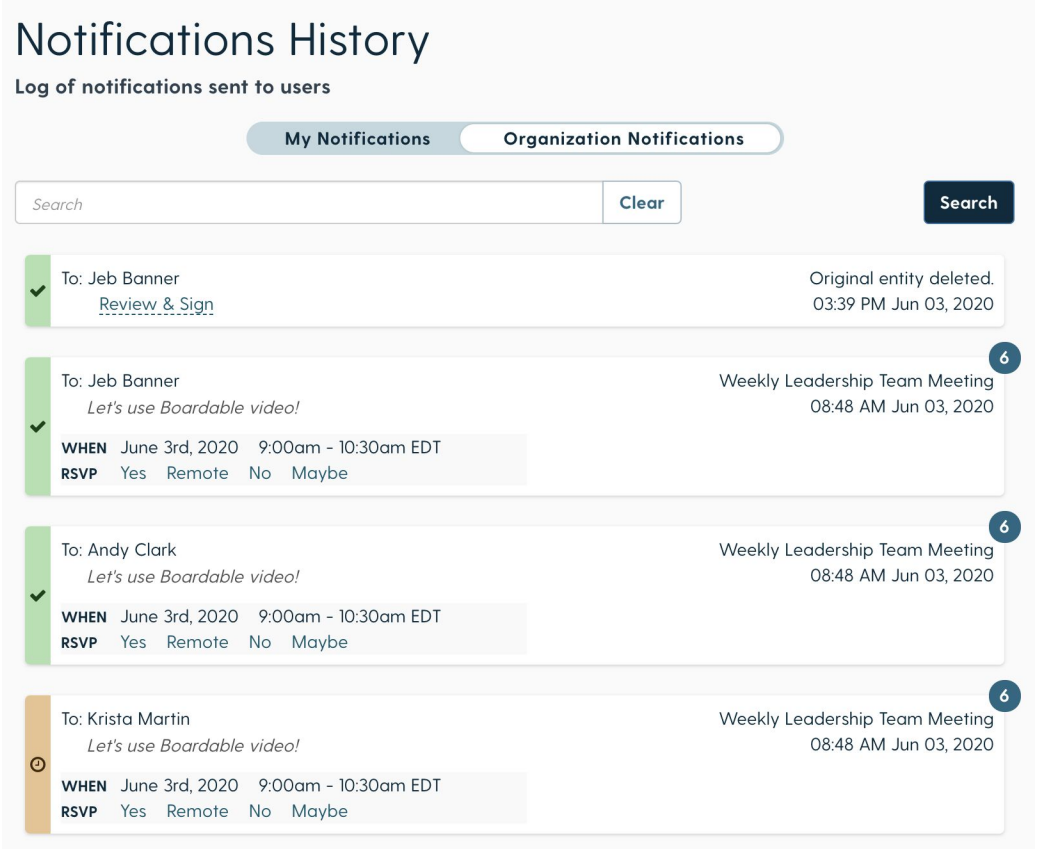
Professional plan only

My Notifications History

See all your notifications in one place

Organization Notifications History

See all your organization's notifications in one place



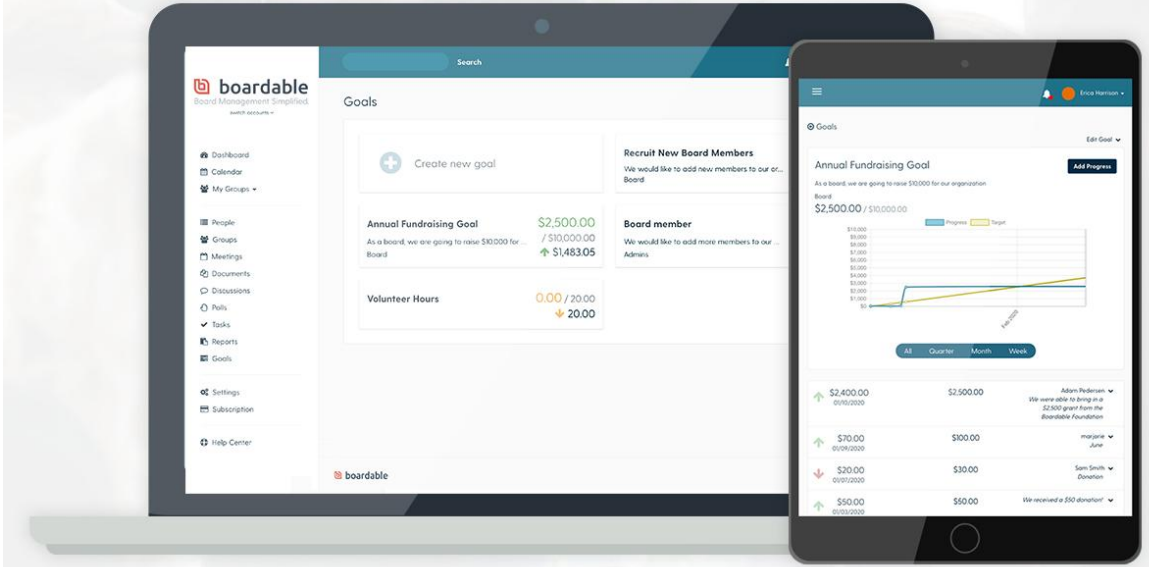
Professional plan only

Hold Your Board Accountable

Set Goals and Track Your Board's Performance

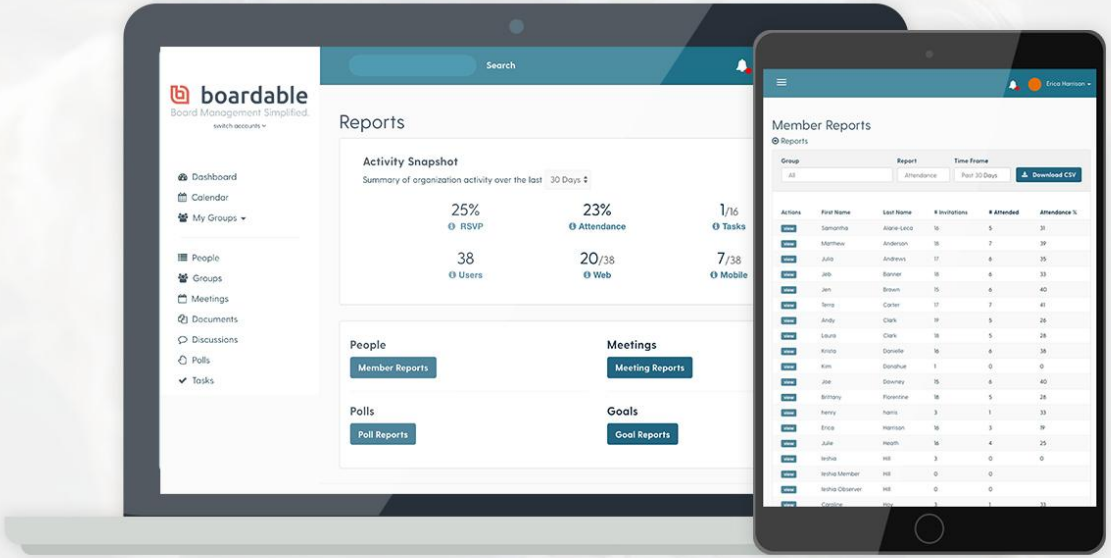
Unlimited Goal Tracking

Visually track your board's performance, strategic goals, and accomplishments



Stay Up to Date on the Health of Your Board

Instantly View and Download Reports of Your Board's Activity



Unlimited Reports

Gain insight into your board's activity

100% Dedicated to your Success

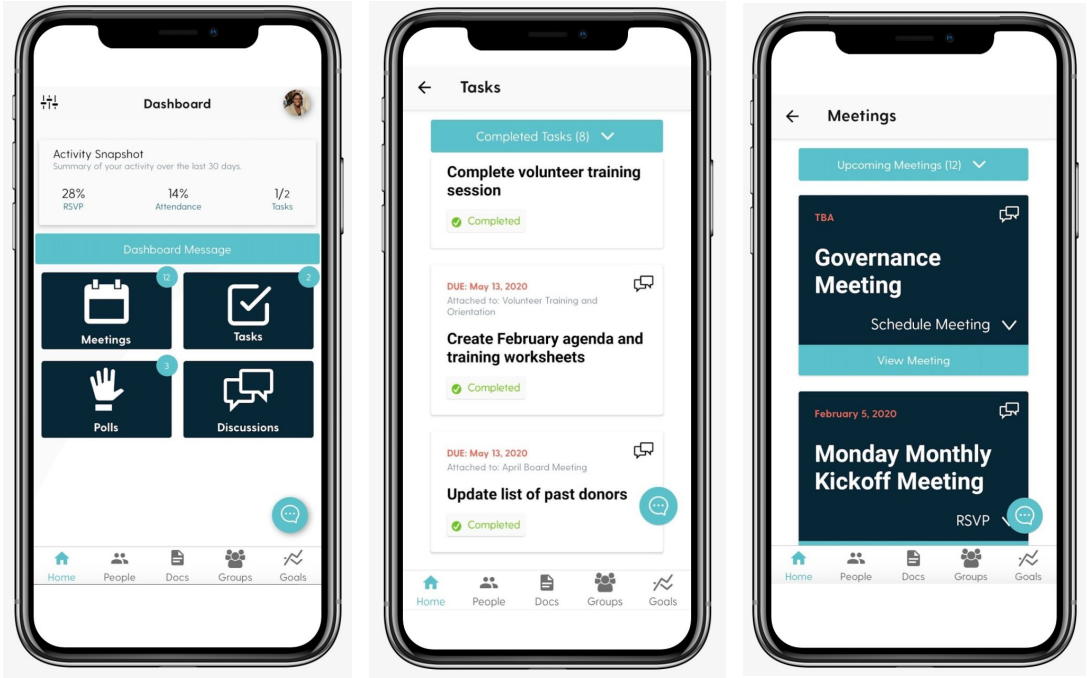
- Guided Onboarding
- Dedicated Customer Success Manager
- Annual Account Review
- In-App Support

Additional Resources

boardable

Mobile App

Available in the Apple App Store and Google Play Store



Security

Boardable employs best practices for securing all user information, data, and documents.

Boardable is Privacy Shield compliant. Learn more at https://boardable.com/security/

This includes the use of Secure Sockets Layer (SSL) certification which encrypts all browser data and Amazon Web Services (AWS).

AWS Document Storage is encrypted and then stored on S3. S3 is redundantly stored on multiple devices across multiple facilities.

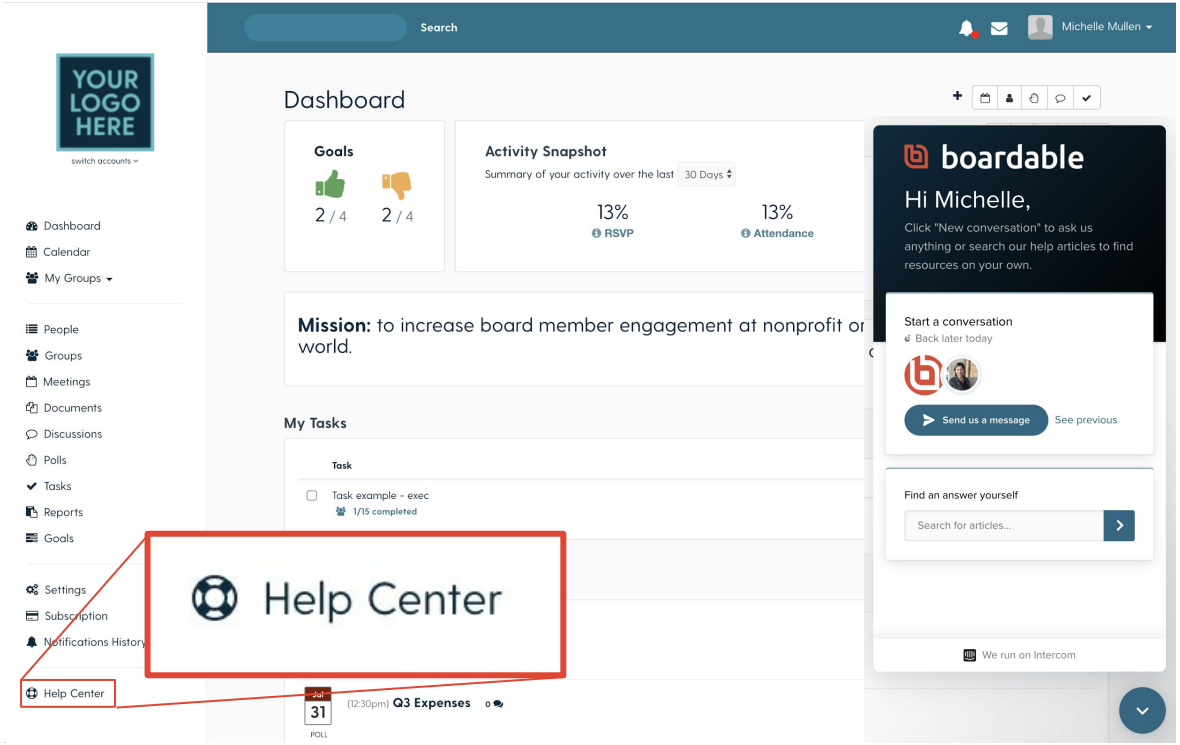
Data Retention. If your organization decides to leave Boardable, we will work with you to export the data you need, including documents, attendance records, and your people director.

Learn more about Amazon's security protocol at https://aws.amazon.com/security.

Have Questions?

Built-in customer support

Click on the Help Center to search for FAQs, answers, and tips. You can also reach us through the chat bubble in the lower right of every screen.



Transparent Pricing.

Essentials

starting at

$79/mo or **$71.10**/mo with annual plan (10% off)

Professional

starting at

$199/mo or **$179.10**/mo with annual plan (10% off)

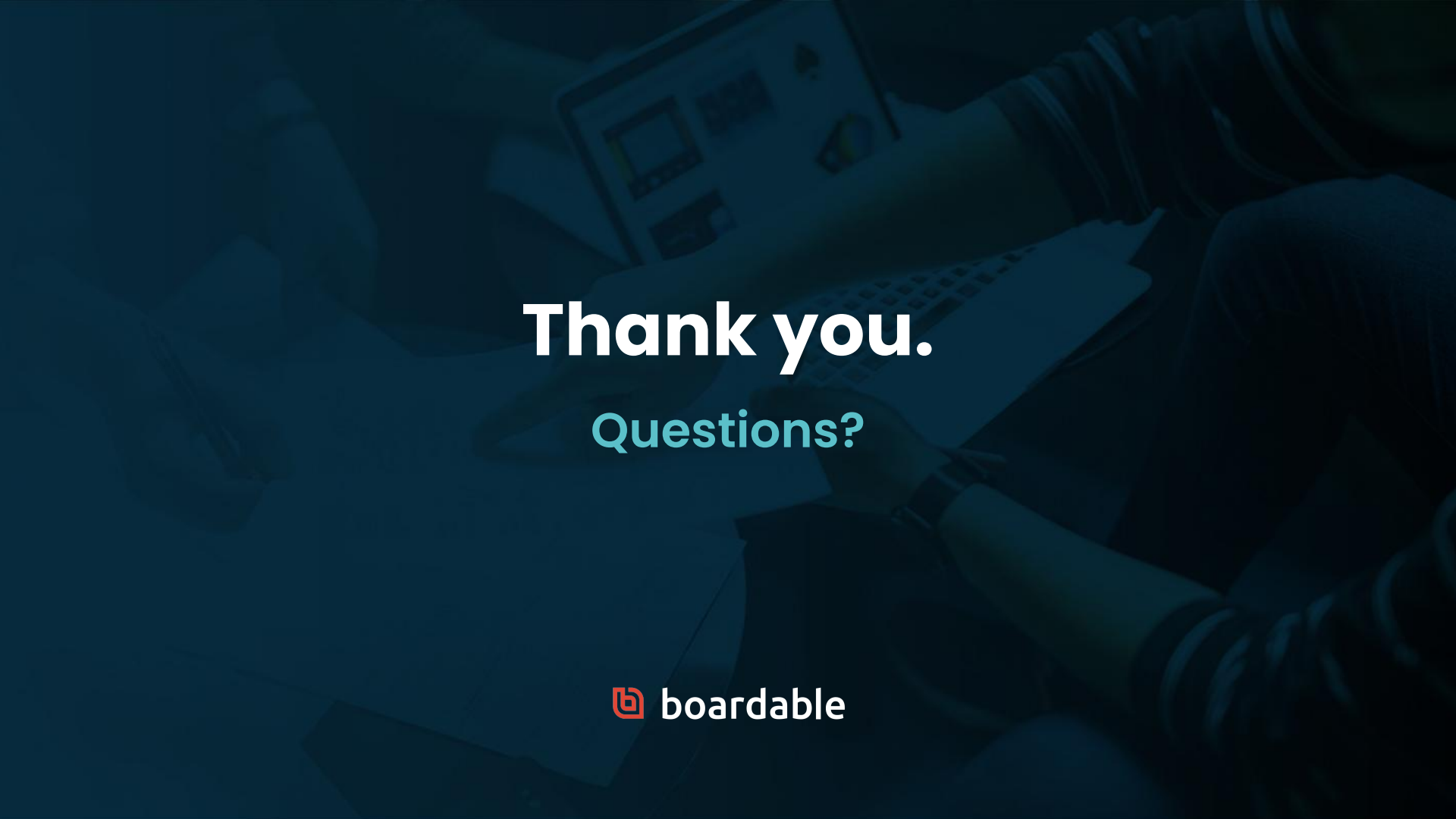
Enterprise

starting at

$299/mo

Contact us for a custom quote

View a breakdown of features and pricing at https://boardable.com/pricing


Thank you.
Questions?
boardable