boardable

# Board and Meeting Roll-Out Toolkit

Congratulations!
You are officially ready to start optimizing your board and meeting activities with Boardable. In order to make the most of this exciting new solution, we've built this Board and Meeting Roll-Out Toolkit with everything you need to make sure you are getting the most out of Boardable.
It's important for you to take a strategic approach to rolling out Boardable for a few reasons:

· First, board or meeting members will often look to administrators for help with onboarding or training.
· Second, getting early buy-in from your board or meeting members allows everyone to start using the solution right away.
· And finally, showing your members the value of Boardable straight out of the gate can help facilitate long-term users down the road.

The first critical component to set up in Boardable is the **Meeting Center.** Board and team collaboration centers around meetings, and one of the foundational benefits of Boardable is that it helps users manage and execute meetings – such as board meetings – on a higher level.
In this toolkit, we'll outline resources, tools, and the action steps you need to take for a seamless transition to Boardable's board and meeting solution.

Introduce Boardable to Your Team
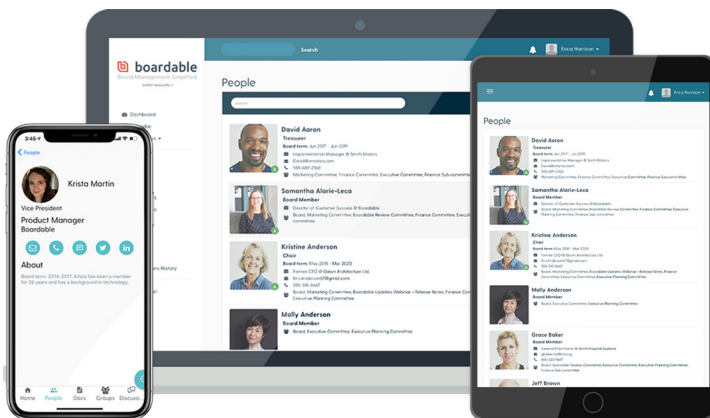
A successful board rollout can be the deciding factor for whether or not a board or team is set up for success with a new platform in the long term.

First, send an email letting your board members know that you will be using Boardable as your new board and meeting management solution. This Board Welcome Email should let board members know what to do when the welcome email hits their inboxes so they can take immediate advantage of the solution.

Next, follow up both on and off the platform. This is especially important in preparation for your first meeting using Boardable. While it's okay to not expect all of your board or team members on the platform in time for your first meeting, you will want to be able to run through any updates and/or takeaways from Boardable, which means you will need at least some people on the solution. We would also suggest that you let all know a specific date that they need to have their account set up.

Crafting the Perfect Board Welcome Email

The big day is finally here and it's time to introduce Boardable to your board members! First of all – congrats! And second of all, don't panic! Here are some highlights to include in your first introduction email, as well as resources that can make it easier for board members to get up to speed on the new platform:

· Let your board know to expect an email from "**hello@boardable.com**" with their login information.

· Provide a clear deadline for when they should have received an email and check in after to make sure everyone received it.

· If you want, you can include some value-added messaging around why you selected Boardable as your board management solution.

· Include a link to the Boardable Help Center and remind them of the in product chat.

· Link to the **Boardable Welcome Video** as well as some quick getting started & how-to links like 'How to Log In' or 'New User Experience'.
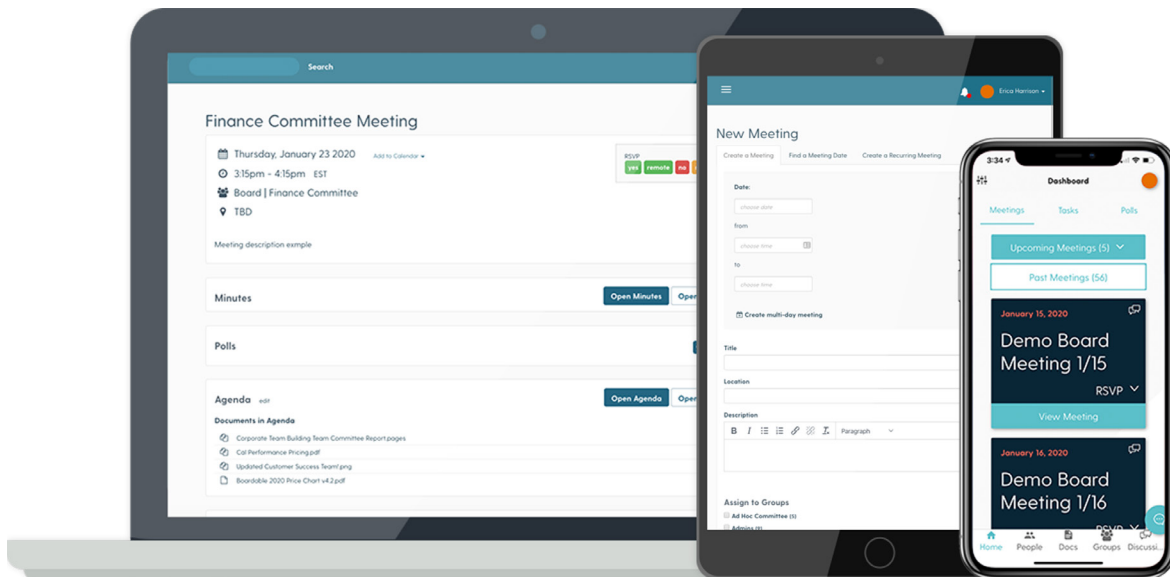
Don't stop there, either. Once members sign up and create their account, ensure Boardable stays top-of-mind by sending all of your communications through the solution.

And finally, it's important to remember that, in reality, a board or meeting rollout never really stops. As a result, sometimes board administrators need to 'nudge' users to log back in and use Boardable.

The best way to ensure that team members are logging in to Boardable on a regular basis is to make it a standard part of every single board meeting, as well as run all supplemental communication and messaging efforts through the platform.


Ensure A Successful Meeting With A Short Test Presentation

During your first board meeting with Boardable, it's a good idea to set aside 10 -15 minutes to share a short presentation as well as answer questions (don't worry, this doesn't have to be formal!). The Boardable team has developed guides and resources we can share to help you run through the platform, discuss its uses and benefits, talk through some hands-on training, and answer any questions that might come up.

This buy-in from your board or meeting members will end up being a crucial part of your roll-out plan as it will be the first time your entire board or team will be focused on and/or discussing Boardable in-person with the ability to discuss its merits, ask questions, and offer up feedback.

# Dig Deep – Determine Your Organization's Success Factors
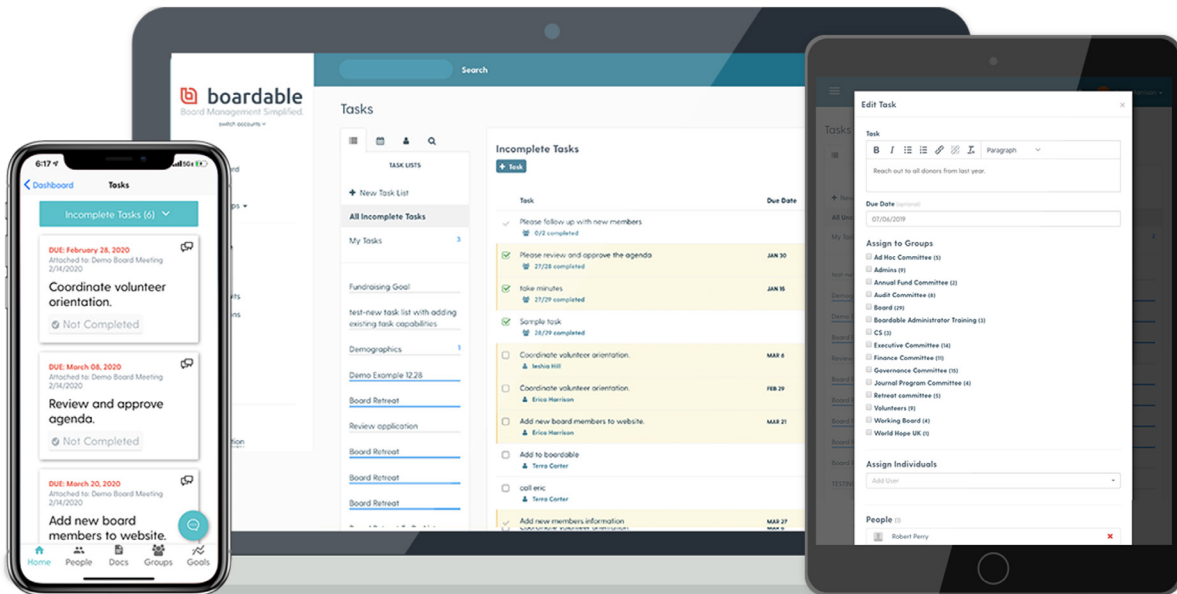
Now that your board or team is set up and using Boardable, it's time to have an internal culture setting conversation about how your team plans to use Boardable, as well as a goal setting session to determine the metrics you will track. These should be two separate activities, which we'll outline below:

Internal Culture Setting

Determining how your board or team will use Boardable's features is totally up to you! Every organization is different, meaning every internal culture setting conversation will be unique. Use Boardable's functionality to host a meeting with your executive committee members and ask them questions like:

· *How do our members want to communicate? How often?*
· *Which features do we want to use, and how do we want to use them?*
· *How will we support our organization's culture and community with Boardable?*
· And so on

Having an upfront conversation and asking for specific team members' input will help you ensure that your organization will be using the right features in the right way at the right time immediately. Just remember: there is no 'wrong' plan when it comes to internal culture setting!
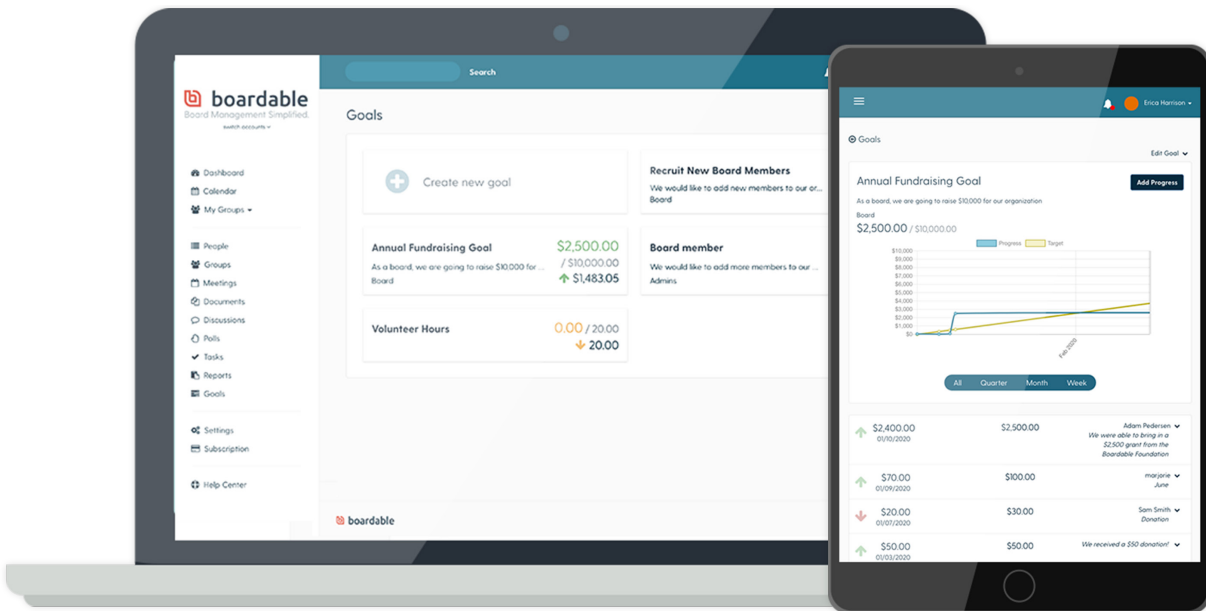
Boardable Benchmark Setting

Setting goals for the implementation and user experience can help administrators and Boardable resources understand how your team is using the solution, how board and other team members would like to be using Boardable, and where there are areas of opportunity or growth.

This goal setting exercise – a dedicated meeting with Boardable resources and your internal team of stakeholders – is meant to set expectations on both sides for what your team is looking to achieve during every stage of your Boardable user experience, starting with implementation.

During the first goal-setting conversation, we suggest boards and teams discuss:

1. The biggest goals and milestones in mind when choosing Boardable.
2. Hard metrics for what 'should' be different in one year after implementing Boardable.
3. Primary barriers or roadblocks to fully adopting Boardable.
4. Any specific board members, teams, or committees who will be early champions during your board's Boardable adoption.

It is a goal of the Boardable team to ensure our customers see value with the solution within 30 to 45 days. In order for us to reach this goal, we work hard to provide resources and tools to help your organization achieve success.

> For Professional Plan users, Boardable will conduct regularly scheduled check-ins and conversations dedicated to success metrics during implementation and roll-out, and we'll make it easy to determine if you're meeting your goals and where there is opportunity to grow.

Wrapping Up
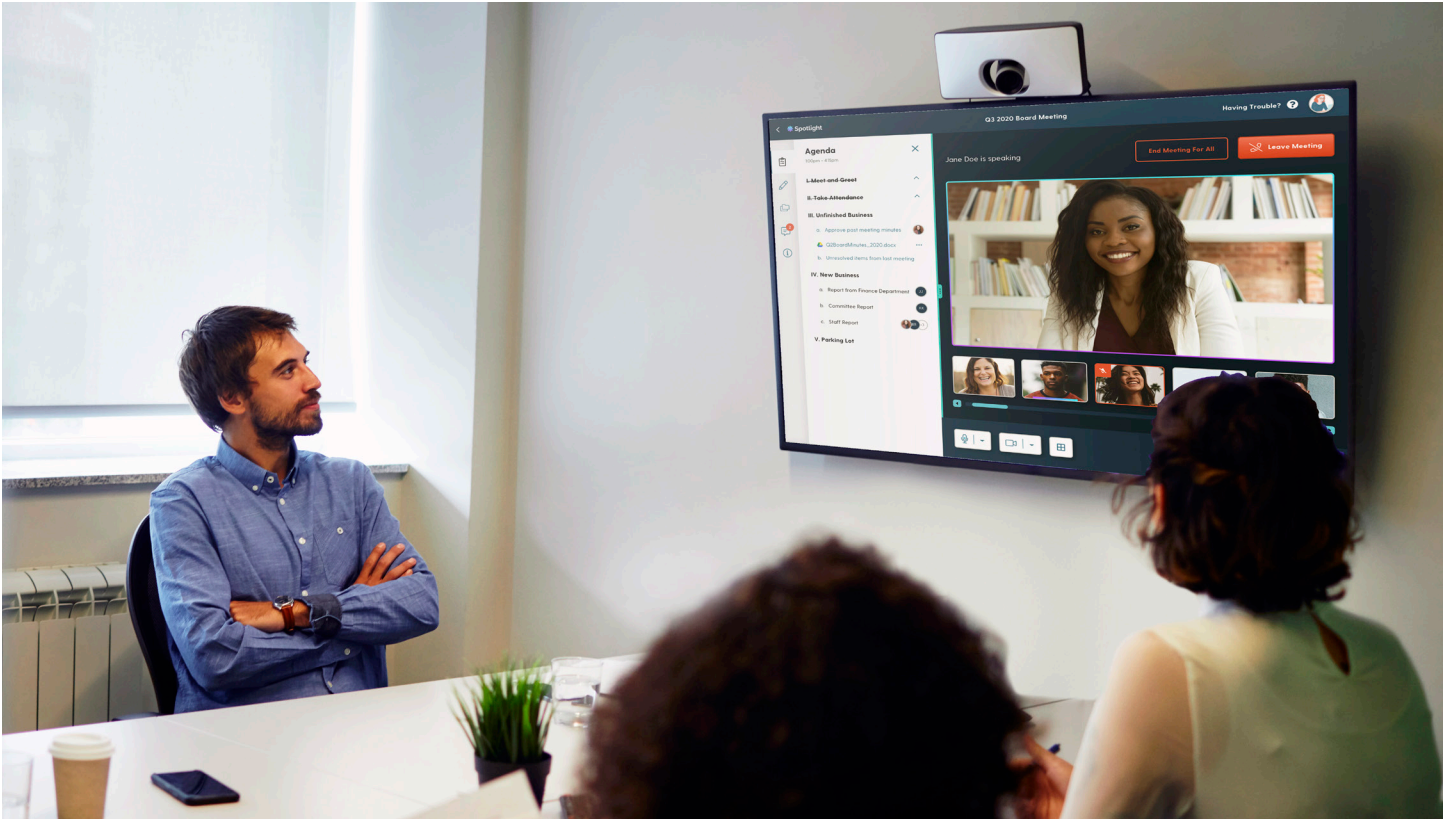
Implementing a new solution doesn't have to mean unnecessary stress or uncertainty. In fact, it should be a time of excitement and anticipation for your administratie team, your board members, and even your entire organization.

Boardable is built for mission-driven organizations and nonprofits to be more efficient, more effective, and more empowered. The success your board stands to see with Boardable starts with how the platform is rolled out to your team. Make your rollout count with these tips and tricks from the Boardable team.

Boardable Roll-Out FAQ's

Why isn't my board member able to find the welcome email from Boardable in their inbox?

Sometimes the first email from Boardable will land in your board member's junk or spam folder. First, have them add *"hello@boardable.com"* as a safe sender, whitelist, or IP address. You can also choose to copy their invitation link from the People page and send them an email yourself.

I can't get my board members to accept their welcome invitations and set up their accounts. What can I do?

Make it fun! Encourage your board members by giving percentage updates on how many have done it and how many days they have left. Or, reward those who have in some way like giving a shout-out or a piece of candy in a meeting.

Where can I find more tips and tricks for administrators?

Please check the **Boardable Academy**, where we have lots of resources and a list of our upcoming training webinars.

Video Tutorials

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

Sample Boardable Email to Team

Dear Board and Staff,

I'm excited to introduce you to Boardable, our new board management portal where we can centralize communications, documents, meeting info, etc. You will receive an invitation email directly from the Boardable app soon.

Please be on the lookout for it (if you don't see it by [Date], be sure to check your spam folder). To access your Boardable account, click the link in the invitation email to log in and set up your profile (takes about 5 minutes).

After you log in the first time, I suggest you bookmark the Boardable login page (**https://app.boardable.com/login/**) and/or the Boardable website (**https://boardable.com/**), which has a link to the login page in the top right corner. The bookmarks will help you find Boardable again the next time you want to access it.

I've included some additional resources below to help you navigate the new system, and there are several support options for us to use as we get familiar with Boardable.

I appreciate your cooperation in taking full advantage of this new tool. **If everyone uses it, we should be able to streamline our operations and be more efficient with our time during and between meetings.**

Please let me know if you have any questions or concerns, and don't forget to look for the Boardable invite email in your inbox soon.

Thank you,

[Name]

Additional Resources:
- **Boardable Overview (video)**
- **New user experience video**: A brief tour of what you can expect in Boardable.
- **The Boardable Academy**: Full of videos, how-to articles, upcoming webinars, and more!
- **Help Center**: Search any topic here for instructional articles to help you maximize the tool.

In addition, please note the whitelist address to add to your "safe senders" / spam filter list:

Domain: emailer.boardable.com

IP address: 159.135.234.26

About Boardable

Built by nonprofit leaders, for nonprofits. Boardable empowers you to work more effectively with your boards and committees. We know the frustration you feel (and the hours you lose) just from organizing a meeting via email, phone, and text. We've lived it. We're from the nonprofit world, too. After looking around for the right tool but not finding it, we decided to build it. Boardable is a software platform that centralizes all communication between you and your board. Find the best meeting times, securely store all of your documents, archive discussion threads and more—all in one place.

For more information, or to schedule a demo, visit us at **boardable.com.**