



# Boardable

## User Adoption Tips

### Welcome to Boardable!

Ready to roll out Boardable to your full board or organization?  
Here's how to get everyone started.



#### Make sure all users accept the invite and log in at least once to activate their accounts

1. If individuals do not receive the invite from Boardable, remind them to check their spam folders and whitelist Boardable emails
2. Use the “copy invitation link” option, and email individual users directly from your personal email address to ensure they receive the invite link



#### Spend 10 min. during an in-person board meeting to walk through logging in and integrating calendars

FOR ASSISTANCE, EMAIL THE  
BOARDABLE TEAM AT:

[info@boardable.com](mailto:info@boardable.com)



### TIPS AND TRICKS FOR AFTER THE FIRST LOGIN



#### Set up members to access Boardable after the first invite:

Create a shortcut or bookmark <https://app.boardable.com/login/>

Download the Boardable Mobile App for on-the-go access

[iPhone/iPad](#)

[Android](#)



### Share these support tools with all members:

Click on the chat bubble to start a conversation with our product support team

Email ([support@boardable.com](mailto:support@boardable.com))

[Help Center](#)



**boardable**

Hi Samantha,

Click "New conversation" to ask us anything or search our help articles to find resources on your own.

Start a conversation



[New conversation](#)

[See previous](#)



### Offer incentives to the most active users

(make using Boardable a fun, friendly competition)

## NEXT, SHARE ONBOARDING RESOURCES WITH MEMBERS

### PDF Documents

[GETTING STARTED WITH BOARDABLE](#) (for admins)

[HOW TO LOG IN TO BOARDABLE](#) (for all users)

[HOW TO WHITELIST BOARDABLE](#) (for all users)

### Quick Videos

[PRODUCT TOUR VIDEO](#) (for all users)

[CALENDAR INTEGRATION VIDEO](#) (for all users)

### Other Sources

[HELP CENTER](#) (for all users)

[RESOURCE LIBRARY](#) (for all users)



## WANT PERSONALIZED TRAINING?

With a professional plan you get dedicated support from a Customer Success Manager to help jumpstart your Boardable account and answer questions every step of the way.

Learn more at <https://boardable.com/pricing/>

### LET'S CONNECT.

@boardableapp

@boardable

@boardable



# boardable

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[boardable.com](https://boardable.com)