



WHITE PAPER

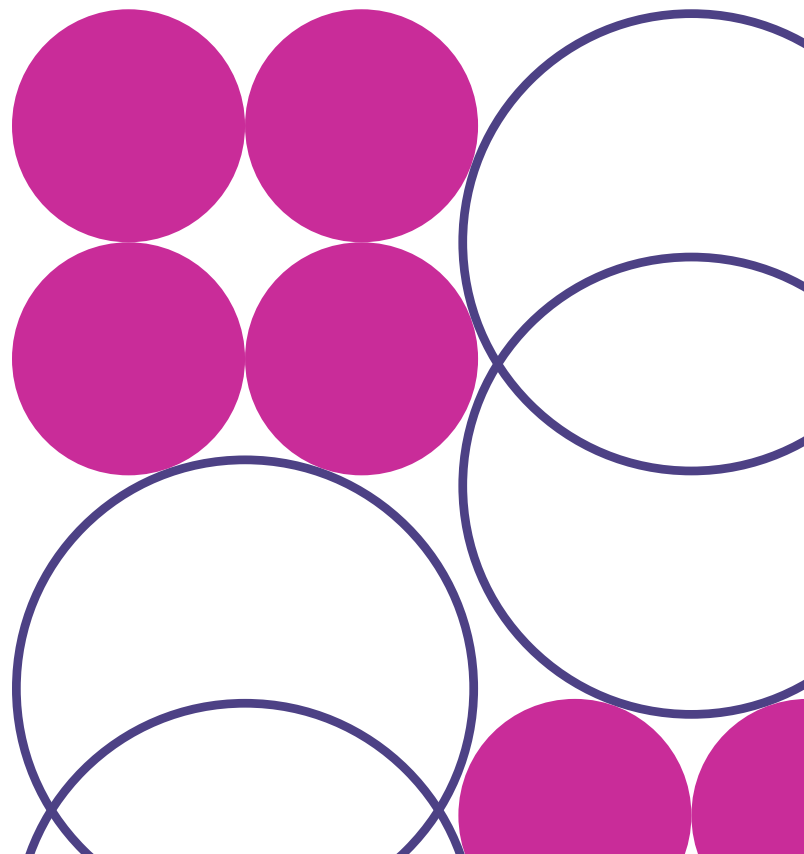
Board Portals: A Guide to Next Generation Meeting Solutions

Written By:
Paroon Chadha



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The State of the Industry: The Cloud Changed Everything

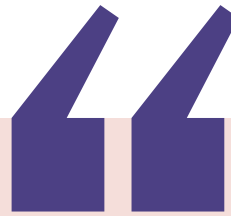
There was a bit of magic in the room the day Steve Jobs unveiled the iPod. It was more than 15 years ago that he profoundly altered the future, declaring, “This amazing little device holds 1,000 songs, and it goes right in my pocket.”

At the time, that was a stunning volume of music. But here and now, having lived through the cloud revolution, that number looks minuscule. What’s 1,000 songs compared to every single song ever written? That, fundamentally, is what the cloud enables—unimaginable scale in real time.

The same principal that drove the iPod also drove the development of a new generation of board-governance solutions: an amazing little device that holds every board meeting—and it goes right in your pocket. Imagine everything you’ve ever signed, every document you’ve considered, everything that is vital to effective deliberations and decisions all housed in one place. A solution with a mobile interface, real time access, streamlined workflows, and collaboration tools that match what every leader should expect from modern technology.

This is how the cloud fundamentally transformed one specific industry, but its lesson is one that is broadly applicable across the entire software industry: The cloud changed everything.

In this white paper, we will explore what to look for in a board portal provider, how board portals evolved over the generations from the PC-centric to the cloud and mobile, and finally, what emerging technologies cloud-first board portals are primed to incorporate next.



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How did we get here?

While ruminating on the state of technological progress from desktop PCs to the cloud, the technology business writer and analyst [Ben Thompson observed](#):

“When it comes to the enterprise side of computing, I would place the cloud as the fourth epoch, and just as the Internet (or in the case of enterprise, on-premise applications) rested on PCs, the cloud very much rests on a mobile foundation: not only do all workers, blue collar or white, have a phone, but they also have that phone in more and more places, and the fact you always have your phone with you means you are, effectively, always available to work...”

What matters — what always matters! — is what actual users want to do, and what jobs they want to accomplish.”

That last line is particularly striking. All too often barriers have existed—due to business models reducing incentives to adopt the latest technology—that have hindered the user’s ability to simply accomplish a task. And often it’s the case that the technology is an afterthought specifically because the business model demands it.

This experience has played out across countless product categories. Gone are the days when SAP and Oracle dominate the market. Washed away by cloud-first providers, companies like Salesforce, Workday, and Intuit have displaced the old guard. Yes, the cloud crept up quickly on the entire industry.

Back to Ben Thompson explaining the benefits of the cloud paradigm, “Cloud-based applications not only offered a payment model (SaaS) that was more attractive to many businesses, but they also removed the need for troublesome upkeep. This, then, allowed other aspects of the product to rise in relative importance when it came to the purchase decision, whether that be specific features or just the general user experience.”

This is the whole ball game. And it’s what fundamentally held back the board portal market. Surveying the space in 2010, the industry was awash in PC-only platforms, engineered exclusively as on-premise

solutions. This necessitated massive capital investments into data centers and drove up the cost of the solutions to governance professionals. That, by extension, led the platform to stagnate on a generation of technologies unable to keep up with the demands of the users; one simultaneously incapable of focusing on driving value by improving the platform, mobility, or the user experience.

This all leads us to the fundamental question: Why should a board of directors make due with inferior technology? Why should our private and public-sector leaders be wed to providers whose business models hamper their ability to deliver a truly useful user experience?

The truth is, your board cannot afford it. Legacy technologies and business models directly translate to missed opportunities for your business.



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The Basics: What is a Board Portal?

For those who have never had the opportunity to use a board portal, a cursory overview is warranted. (And if you have, feel free to skip this page.)

Today there are several board portal applications to choose from, though there are significant differences between the offerings. At their core, board portals are designed to:

- Facilitate the creation and distribution of board materials
- Enhance collaboration around meeting logistics
- Securely deliver board materials to director's devices
- Improving the review of board materials by the directors
- Improve the actual board meeting by streamlining the mundane and opening up significantly more time for strategic discussions
- Facilitate important board actions such as voting, minutes approvals, and board assessments

Board portals are dedicated platforms that digitize and streamline the meeting experience. Those organizations who invest in the right technologies will improve meeting outcomes and provide the time needed to focus on broader strategy.



Simply, board portals are dedicated platforms that digitize the meeting experience.

What to Look for in a Board Portal Platform Provider

Before you purchase a board portal, before you commit your board to a long-term contract, it's imperative to understand what to look for in a board portal provider and to know which questions to ask as an informed buyer. After all, changing course, particularly in your boardroom, can be extremely taxing.

So what should you look for?

When searching for a reliable board portal provider, these are the most important factors to consider: Platform and Credibility.

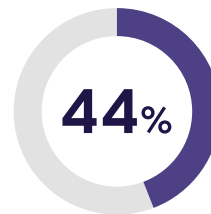
In pursuit of a perfect platform

A great platform is defined by its ability to promote collaboration, deliberation, and improve board flow. This is important for a variety of reasons; not the least of which is directors are already pressed for time at board meetings. Consider this excerpt from a report from [McKinsey](#):

“Most boards have about six to eight meetings a year and are often hard pressed to get beyond compliance-related topics to secure the breathing space needed for developing strategy. When we recently surveyed board members to learn where they'd most like to spend additional time, two out of three picked strategy. A related finding was that 44 percent of directors said their boards simply reviewed and approved management's proposed strategies.”

To truly make room for deliberations, you need to ensure the vendor's board platform is designed to provide directors more time to hold strategic discussions. That means efficiency is key. In particular,

the speed that you build a book and the way you access and prepare for the meeting should result in real-time savings. When done right, the platform should allow for collaborative board meeting preparation. It should also provide directorship immediate access to review information or last minute updates anywhere, on any device, so you're ready to hit the ground running when the meeting begins.



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That's the key: Your platform should ensure that the meeting is productive, Board book access is intuitive, archives are accessible, meeting actions such as votes can be taken, minutes entered, that time is measured to guarantee you have devoted time to strategic deliberations. Time savings—the result of improved collaboration before and during a meeting—is the single most important benefit a platform can provide your board.

A truly collaborative experience, however, hasn't come naturally to the board portal space. Wedded to old technology, most platforms were never engineered to take advantage of cloud-first technology.

Credibility for a long-term partnership

Experience should speak for itself. After all, you are trusting a company to handle your most sensitive materials. Those providers with long-term partnerships across a variety of industries have proven that they won't compromise your materials and will always be around to take your call.



More than just security, credibility is derived from the number of years a provider has spent delivering on their promises across a variety of categories: support, training, and customer success.



More than just security, credibility is derived from the number of years a provider has spent delivering on their promises across a variety of categories: support, training, and customer success. These are the questions you should ask to find the best possible vendor:

- Does the vendor offer 24/7 technical support that you can always speak with no matter where you live? Is this support being delivered through an outsourced vendor?
- Ask about training materials, keeping in mind that everyone learns differently:
 - Do they provide hands-on training for new directors and administrators?
 - Do they offer a robust library of training materials including guides, and videos?
 - Is there built-in training on the platform, as it can get embarrassing to request for downstream questions?
 - Are both guided and self-taught training options available to every member on my team?
- Finally, does the vendor offer your organization a dedicated, named account manager who knows when your next meeting will occur, and is prepared to help in every way possible? Do they provide a relationship with an individual who will always be around, who knows each member of your board (if you wish), and how to best instruct them? A reliable account manager will be there to answer any questions and will be invested in your organization as the main point of contact for supporting your board.

Those aren't easy criteria to meet, especially for cloud-first providers just entering the scene. You can't trust your board documents to a platform that may not be solvent—that may vanish into the night like a fleeting side project. This is particularly vital for a platform for board meetings. Demand a provider that has a track record, a history of delighting their customers, and one that you're certain will be around for the long-haul.

This brings us to the types of board portals on the market. Board portals have gone through three distinct evolutionary periods. The next section will provide an in-depth look.



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Gen 1.0

- Board materials are sent over email
- Board materials are placed on a file sharing site like Box, Dropbox, or Google Drive
- Board materials are linked to a PDF



Gen 2.0

- On-premise solution
- Only available on PC and tablets
- Administrators are required to buy separate licenses
- Skeuomorphic design mimics the real world; (if the board books look like notebooks and paper)
- Complex user interface not designed to be user-friendly
- Expensive pricing rooted in data center costs
- No fee trials



Gen 3.0

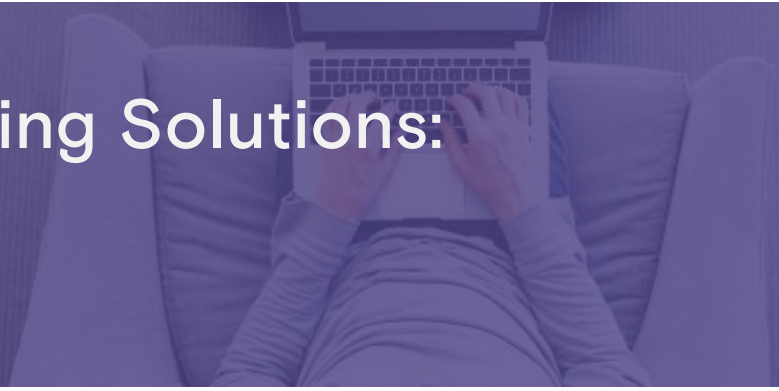
- Cloud-first engineered
- Available on every device: iPhone, Android, iPad, Windows, MacOS, & Kindle Fire
- Notes and annotations seamlessly sync between every device
- There's no save button, every change and update occurs in real-time; just like Google Docs or Office 365
- Flat, modern design
- Free trials



Gen 4.0

- Digital assistant enabled to streamline scheduling and information indexing
- Smart Bots automate tasks for administrators
- A.I. predicts and makes suggestions on what material will be important for directors to consider at their next meeting
- A.I. Coaching assists directors in meeting preparation and execution

Generation 1.0 Meeting Solutions: Email & File Sharing



Long gone are the days of printed documents, FedEx couriers, and endless filing cabinets. Replaced by the glow of a computer's screen. In the wake of this technological disruption, the first generation of meeting solutions were born. They were basic communication platforms: A simple way for board professionals to facilitate important communications between directors and the company, moving board work from paper to the digital realm by leveraging email and file-sharing sites to communicate with the board of directors. At their core, the purpose is to take advantage of digital's increased efficiencies, communications, and convenience.

Through these first-generation solutions, documents are compiled and sent to directors via non-secure

digital channels. Administrators export all materials to PDFs, bundle them as attachments, and point the directors to the right location. Some organizations compile each document into one large PDF. For the variety of platforms boards utilize for this initial digital transition, none are designed for the work of committees or a board of directors. Instead, they are platforms for sharing digital documents to directors.

While Generation 1 covers a variety of services, at their heart they are digital platforms that enable distribution like Dropbox, file sharing, SharePoint, email attachments, and homebrew solutions.

You can be certain you're using Generation 1.0 board portal technology if:

- Board materials are sent over email
- Board materials are placed on a file sharing site like Box, Dropbox, or Google Drive
- All Board materials are manually linked to a PDF
- Votes, assessments, and surveys and surveys are done over emails

Obviously, Generation 1.0 board portals are pretty easy to spot. But they are still, sadly, used despite severe security concerns and a poor user experience. You're only as strong as your weakest link, and if you have one director who can't use the platform, who mistakenly presses share or forward on a confidential document, then you are not on solid footing. These Generation 1.0 platforms neither promote collaboration, nor are they designed explicitly for board meetings. And that was the impetus behind the development of the first board portal.



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Generation 2.0: Board Portals

Engineered with being a ‘secure board book compiler’ as their top priority, second generation board portals are purpose-built for a board of directors, and they streamline the creation and distribution of meeting materials as their primary objective.

Board portals typically include features meant to improve board meeting preparation. Take, for example, a resource library: a digital repository of critical board information such as the bylaws, corporate charter, and the annual budget. They also give directors access to a catalog of previous board books, contact information of their fellow directors, and basic calendar integrations. Moreover, platform accessibility is still often abhorrently narrow, limited to desktops (often Windows only) and iPads, nearly a decade after Smartphones had become commonplace.

Yet, their primary functionality is still in service of creating board books and securely delivering them to directors. Mimicking paper, the design of the interface was copied directly from the real world. Board books are often built to look like a bundle of paper or a notebook—also known as skeuomorphic design.

Skeuomorphism is a dated design philosophy. As users became familiar with the broad concepts of working on computers and interacting with software, the need for a real-world visual representation was eliminated. What replaced it was flat design which emphasized visual clarity and simplicity. That clarity is key for processing information naturally, and it’s why any board portals that have users in mind have moved on from skeuomorphic designs.

Any board portal that still holds onto skeuomorphic design is out of touch with how people interact and what they expect from their technology. Apple introduced Skeuomorphism to the world and kill it, as [detailed in this 2013 Forbes article](#).

A central distinction between Generation 2 and 3 board portal technology is [how they are created and hosted](#). Most portal providers that started in early 2000s were designing software for on premise hosting. These implementations have since given way to a vastly superior method to engineer software using the Single Tenant Cloud based architecture.



clarity is key for processing information naturally, and it’s why any board portals that have users in mind have abandoned designing platforms that look like paper.

The key benefit of this cloud architecture is not just that it's efficient to have a single edition that everyone accesses, but that it's less costly, engineered for all browsers and devices, superior in its redundancy and availability, and more secure. While all significant selling points of the Cloud, the key benefit is the agility that comes with a cloud based set up. The providers that are of "Cloud First-Mobile First" can update faster, experiment faster, innovate faster, and react to security threats and user preferences much faster.

Which is all to say being cloud first and mobile first is first and foremost about business agility that can quickly translates to more integrations and better user experience.



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How to spot a Generation 2.0 board portal

- You are required to install software on local servers or desktops
- If they firmly state they are not a Cloud Solution
- If the board portal is **not** accessible on every device: iOS, Android, Mac, Windows, and Amazon Fire
- Administrators are required to buy separate licenses
- They do not offer a free trial or are reluctant to do so
- Administrator access is only available on Windows PCs
- The design attempts to mimic the real world (the board books look like notebooks and paper)
- Expensive pricing explained by the high cost of data-centers

Generation 2.0 Board Portals are easy to spot, but some providers may be opaque in their presentation. The biggest tell will be their inability and unwillingness to provide a free trial, which is centrally rooted to the architecture of the product. In most cases, it will be either impossible or prohibitively expensive for Generation 2.0 providers to start a trial based on both their technology and business model.

What really separates Generation 3.0 (Gen 3) board portals from legacy platforms is that once in the hands of users, the Cloud allows Gen 3 providers to get feedback from actual users faster, so they can iterate on that knowledge and make the product better, faster. These providers incorporate a "build-measure-learn" loop, adopting a faster, more agile product development methodology.

Generation 3.0: Real-time, Collaborative, Board Portals

Gen 3 board portals are engineered to be cloud-first, user centric, and designed to improve board meeting outcomes by learning and quickly deploying new technology. Deeply focused on actually driving results at board meetings, these board portals leverage the cloud to innovate faster, deploy faster, train users faster, and are designed to improve the overall portal-using experience.

What does this look like? The ‘agile’, “build-measure-learn” loop, has driven significant improvements for both administrators and directors.

The core collaboration improvements enable as many people as necessary to work together to create and distribute board material. An administrator in Chicago and their CFO in New York can update the board book simultaneously. Never having to press save is a sure sign of Generation 3 technology. Think about it like using Google Docs or Office 365, It’s not just that you will never lose your work –but it’s also the best way to “co-author” without going through the version nightmares that are best left for the annals of technology history. One striking example is when a director takes notes on their iPhone, it immediately syncs to the cloud, seamlessly appearing on their desktop as well – or any other device they choose!

That real time syncing between devices was key to expanding board portals beyond the desktop and iPad apps. Leveraging the cloud, Gen 3 board portals are available on every device and platform (iOS, Android, Windows, MacOS, Kindle Fire). This provides directors the opportunity to use any downtime to continue their review on their own terms on their favorite device. This translates in real-time workflows. Administrators are able to publish parts of the board book, and directors can receive notifications and immediately review material. Once they get to the meeting, that additional preparation pays dividends.

Gen 3 board portals offer a suite of real-time tools that can be leveraged during a meeting. Approvals can be conducted directly through the board portal platform, creating an immediate record of every decision. Minutes can be immediately linked to the board portal without any additional steps.

eSignatures can be procured at any time for the approval of minutes, signing attendance records, or approving an action with written consent. By providing these streamlined workflows, Gen 3 board portals allow meetings to get rolling immediately, dispensing with routine business so directors have time for strategic deliberations. The result is a meeting platform that is actually focused on improving outcomes.



Finally, deep the Integrations of cloud applications are miles ahead of the traditional legacy software offerings. The cloud first providers leverage the cloud not just for the massively scalable hardware paradigm but also use tightly or loosely-coupled ecosystem partners to help get to market. They successfully leveraged APIs to avoid reinventing the wheel, such as for complex metering and billing system, single sign-on, and analytics system.

Simply put, cloud-first engineering opens up possibilities that were unheard of for second generation board portals. The agility and collaboration benefits of the cloud changed the course of board meeting solutions.

How to spot a Generation 3.0 board portal

- The board portal is available on every platform: iOS, Android, Mac, Windows, and Amazon Fire.
- Notes and annotations sync between every device (a note taken on your iPhone instantly appears on your desktop)
- There's no save button, every change and update occurs in real-time (just like Google Docs or Office 365)
- Two or more individuals can work on building a board book at the exact same time without needing to check out/ logout to avoid conflicts
- The board book can be partially published, so that work can be pushed out to directors as it's uploaded to the platform.
- The board portal integrates with most popular software and technologies you commonly use like Microsoft Office, Office 365, Google Docs, Google Authenticator, Outlook, Exchange, Google ID, 3D Touch, Touch ID, Face ID, etc.
- The design looks modern and flat, explicitly not like a real-world paper version. The Interface is designed from the beginning with the end-user in mind: the Director.

- The board portal has approval collaboration tools like the ability to generate minutes that sync automatically from the cloud to your board book, the ability to discuss and deliberate on board materials before the meeting, and eSignatures to expedite decisions between meetings
- The provider is able to instantly provide a free trial and can get you into the platform within minutes to try it for yourself

Gen 3.0 board portals were engineered to ensure they actually improve meeting outcomes. They are very easy to use, they empower administrators and directors to collaborate in real-time, and they are conveniently available on any device.

Here's the bottom-line: Gen 3 board portals put all the information you need at your fingertips at all times. Yes, the world of 1000 meetings in your pocket is already here!



What really separates Generation 3.0 (Gen 3) board portals from legacy platforms is that once in the hands of users, the Cloud allows Gen 3 providers to get feedback from actual users faster

Generation 4.0: What the Future Holds

Looking toward the future – It's imperative that even cloud-first providers keep their gaze pointed squarely at the horizon. There are clear and unmistakable technologies in their infancy that will radically reshape what we expect and how we interact with board meeting solutions.

Core to the future of the governance technologies is a shift toward technology being able to coach the end users to better execute in your board meetings—simplifying the process for both meeting participants and supporting roles.

Passageways product researchers and thought leaders have identified a series of upcoming technologies that will drive the future of board portals. Already we are seeing these technologies impacting a broad range of technologies. What does the board room of the future look like? Let's explore.



What we expect from Generation 4.0 board portals

- **Digital Assistants.** By leveraging the data in your board portal, digital assistants will provide additional context for information during meeting preparation. The digital assistants will know your notes and information in your board book and assist you finding the right data. They will also help you manage your calendar, and ensure you're always on time for the next meeting. Whether leveraging Siri, Cortana, Google or an custom virtual assistant solution, these digital assistants are primed to improve meeting preparation and outcomes. For Example:
 - “Hey Siri, remind me when I am reviewing the annual budget to consider my notes from the May 24th board meeting.”
 - “Hey Siri, let the minutes reflect that there were 7 members present for this meeting.”
- **Smart Bots.** When you are creating a board book, smart bots will activate to save you time and resources. For example, when building a board book they will suggest leveraging a former template and auto populating the agenda based on information like the name of the meeting or the date. If a certain section is still pending materials from a member of the leadership team, the bot will automatically generate a reminder. Smart bots will act to streamline routine matters, ensuring both administrators and directors have more time to focus on the meeting's substance.

- **Artificial Intelligence (AI).** As AI and deep learning technologies advance, smart-digital assistants will also work independent of the platform, providing context-aware information. The deep learning enabled by the data in the cloud will allow AI to predict and make suggestions on what material will be important for directors to consider at their next meeting. Imagine your board portal suggesting based on your own analytics and recent Google News trends that a loan you are considering may be riskier than you had anticipated. Consequently, the software will learn patterns that best promote board governance.

- “John, should we include this Financial Times article in next quarter’s committee report?”
- “Alice, based on notes and annotations, here’s what will be the most important sections of the board book to prepare for.”



It’s simply a matter of improved data, learning, and computation power before the AI is prepared to truly assist you in meeting preparation and execution.



- **AI Coaching.** It’s simply a matter of improved data, learning, and computation power before AI is prepared to truly assist you in meeting preparation and execution.
 - “John, based on an analysis of the board book, we suggest reviewing the Competitive Analysis Report, as it is frequently referenced in discussions and contains important information on FY2018.”
 - “Chairman, this meeting is running behind pace, you may need to make adjustments in the agenda to finish the meeting on schedule.”
- **Virtual Reality and Augmented Reality.** As network speeds improve and manufacturers continue to churn out ever faster devices, the leap to virtual and augmented reality is imminent. It’s easy to look at this concept and see its natural extension to the board meeting space. Plugging directors and management into virtual meetings to collaborate together, from anywhere in the world. Take your board members for a digital onsite visit to a store opening, provide a virtual walkthrough of a new office building, or teleport directors into the boardroom.



All of these technologies are moving us toward truly being able to have a meeting anywhere, anytime, from any device, without anyone having to be physically present. This future augmented board meeting immersed with coaching and assistant AI is an industry moonshot, but when the day arrives, only board portal providers that leverage the cloud, machine learning, and “build-measure-learn” development practices will be capable of executing on such a grand ambition.

Together, the seemingly disparate technologies, now poised to shape the next generation of our experiences are specifically applicable to board governance settings. Similar to Gen 3.0 board portals, Gen 4.0 board portals will continue to ensure that not only directors have substantially improved information, that they are better informed for each meeting, and that their time is not wasted. Generation 4.0 offering will get us all closer to spending the vast majority of the time during board meetings on strategy.

- **Blockchain Security.** A blockchain is a decentralized and distributed digital ledger that is used to record actions across many computers so that the record cannot be altered retroactively. The most innovative aspect of blockchain is the decentralizing of trust. Organizations must trust their board portal is not compromising records, that it’s not using confidential information for it’s own benefit, that it correctly authenticates users, that it’s is protecting access from malicious parties internally and external, that it will always be available for their user, etc. There are specific instances of these trusted processes would be made broadly more secure, private, and trustworthy on a blockchain, so that no single party has the ability to act maliciously or to their own unfair advantage. For example, an ephemeral document that self-destructs after a set period of time. A blockchain like Ethereum could be leveraged to build logic around documents or resources that become permanently inaccessible after a set period.



This technology is moving in the direction of being able to have a meeting anywhere, anytime, from any device, without anyone having to be physically present.

Conclusion

“What matters – what always matters! – is what actual users want to do, and what jobs they want to accomplish.”

Directors want to get information faster so they are better prepared; administrators want more time to assemble relevant board materials; and organizations want a better-prepared board of directors with sufficient time to have real strategic deliberations and outcomes.

That’s why we built OnBoard. We took a chance anticipating the market was ready for a cloud-first board portal and became the first completely mobile compatible platform. We are proud to say that we are the only provider prepared to incorporate emerging technologies into our solution because of the platform and technology stack we are built upon.

OnBoard is marked by great contrasts with Generation 2.0 board portals. It’s the only board portal available on every platform and operating system where notes and annotations sync across every device, work is never lost, and board books can be built by multiple individuals at the same time—all with an interface specifically designed to ensure even a technological novice will find it compelling and useful. It’s the only board portal that was designed to actually improve the outcomes of meetings and not just board book creation.



Directors want to get information faster so they are better prepared; administrators want more time to assemble relevant board materials; and organizations want a better prepared board of directors with sufficient time to have real deliberations and make strategic decisions.



Call us anytime at
765.535.1882 or email us at
more@onboardmeetings.com.
We are the only Generation
3.0 board portal provided
to provide free,
no-strings-attached trials

FREE TRIAL

And just as importantly, because it's cloud-first, OnBoard is the only board portal capable of incorporating various integrations with other software you already use such as Microsoft Office 365 and Outlook. Given these fundamental strengths, OnBoard is also poised to leverage emerging technologies to improve every aspect of board meeting process, from creation, to distribution, review, and deliberations and lead the industry into the next generation of corporate governance.

We said at the outset that before you purchase a board portal, and commit your board's toolset to a long-term contract, it's imperative to understand what to look for in a modern board portal, as well as which questions to ask vendors so you can be an informed buyer. Now, equipped with that information, you know what to look for and which questions to ask.

Call us anytime at 765.535.1882, or email us at more@onboardmeetings.com. We are the only board portal provided that offers free, no-strings-attached trials, so you can truly evaluate the platform before you make a commitment. We promise you'll love OnBoard.

Just try asking anyone else for a free trial! Only Generation 3.0 providers can deliver.