

10 Questions to Ask When Buying Board Portal Software

There are plenty of options for board portal software on the market today. Once you've decided that you want a secure, technology-driven solution for your board, how do you narrow down the products out there and decide what is right for your team? Price is always something to consider, but beware of paying attention to just the sticker price. Attached is a list with some items to consider during your board portal evaluation process.

If you like what you see, one of our competitively priced board portal packages will definitely work for you and your board.

Buying a board portal is an important decision, and one you'll want to consider carefully. Here are the top ten questions to ask before you do a deeper dive on technology, business practices and references. If these aren't answered to your satisfaction, it's probably time to look at another provider.



Equal Focus on Board Members and Board Professionals

1. Board Administration

- Does the board portal have robust scheduling features including the ability to poll members on availability, configurable RSVP options for both in-person and via phone, and saved locations?
- What other scheduling features are available with your board portal?
- Does your board portal allow for drag-and-drop meeting book creation?
- Can meeting and board books be easily updated and changed without disruption or syncing requirements?
- Can administrators manage user creation, editing, and adding/viewing custom fields such as term dates, birthdays, special interests, etc.?
- Do administrators have the ability to reset passwords?

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2. Board Members

- Does your board portal offer viewing of time-sensitive information on the homepage?
- Do board members have the ability to RSVP and sync their calendar from email?
- Is the calendar sync compatible with Outlook, Google, and iCal?
- Does your board portal offer auto-save annotations for all documents?

Technical / Maintenance

3. New Releases and Updates

- How are new releases and updates handled?
- Do releases require a scheduling date?
- What is the frequency of new releases?
- Do new releases and updates require company and/or director involvement?

4. Types of Access

- Are your board portal apps compatible with both tablet and phone on the Apple, Android, Kindle, and Web platforms?
- Are all available apps full-featured?
- Do all apps exactly mirror each other ensuring one seamless experience for all users at all times?



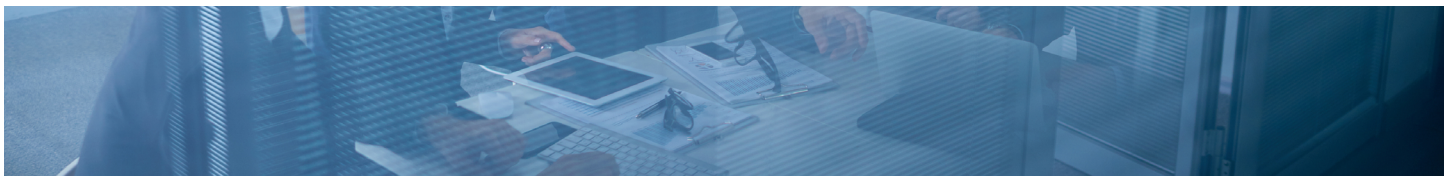
Onboarding and Support

5. Board Portal Setup

- What is the process for setup and rollout?
- How long is the timeline for your board portal to be up and running?
- Are your training sessions limited or unlimited?
- Will training include sessions for both board members as well as administrators?
- Will we receive vendor assistance with the board portal setup?

6. Ongoing Support

- What types of ongoing support are offered?
- Is your customer support limited or available 24/7?
- Does 24/7 support help with more issues than password resets?
- What kind of support is offered?
- Does the support include How To Videos, FAQ, ongoing remote training, and a single point of contact?



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Security

7. Application and Infrastructure

- Is your company SOC and GDPR Compliant?
- Does your board portal offer two-factor authentication?
- Are remote wiping capabilities available in case a device is lost or compromised?
- What encryption levels are available with your board portal software?

8. Company and User Options

- Does the company have the ability to restrict printing, downloading, annotating?
- Does the board portal offer auto purge of document annotations?
- Does the board portal offer multiple security levels of administrators?

Pricing

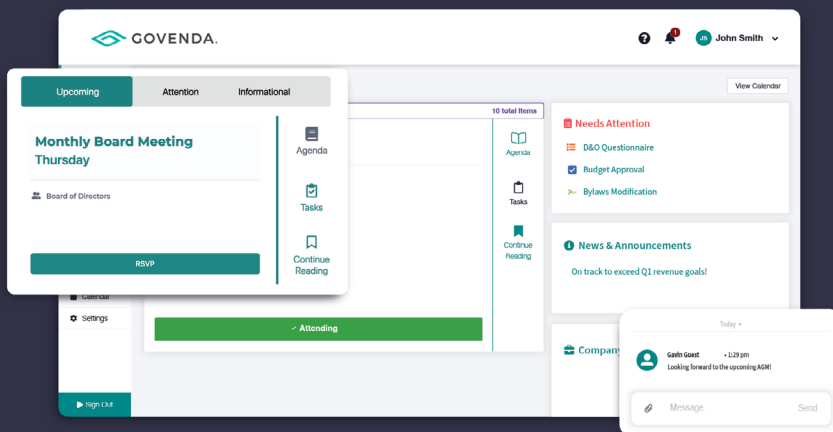
9. Board Portal Price

- How does the board portal price its offering?
- Does the board portal allow for unlimited access or use a licensing model?
- Does your board portal have role based user costs that differ between administrators and board members?
- Do the prices for the board portal allow for unlimited groups/committees?

10. Additional Costs

- Do you charge set up fees?
- Do you charge support fees?
- Do you charge new release fees?

The innovation leader in board management platforms.



- ✓ Improve Decision-Making
- ✓ Accomplish More in Less Time
- ✓ Mitigate Compliance Risk

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