

# The Roadmap to a Smooth Board Portal Implementation

## 6 Questions to Ask When Transitioning to a New Board Portal

There are many advantages to adopting board portal software such as increased efficiency, better communication, and risk mitigation. Without a clear implementation plan, the board may get confused and frustrated, leading to less adoption of the solution. Asking specific questions about the transition to a new solution is essential for anticipating and addressing potential challenges.

Here are the top questions boards of directors should ask their potential board management software provider before signing on:

### 1. How long does the software take to get up and running from the time the contract is signed?

**Preferred Answer:** The sooner, the better.

Custom applications and “pioneer” board management software can take **three to four weeks** to get up and running. But, newer technology and improved methods for distributing that technology allow boards to get full access to new board portals **within a day** of signing their contract.

### 2. Do you have a single point of contact for questions and training?

**Preferred Answer:** Yes

Your board software provider should assign you a single point of contact who understands your board’s needs. The provider should also provide 24/7 support to you and your board members.

While board software should be simple and require little support, it’s still helpful to know that a direct point of contact is available for guidance while your team is adapting.

If any questions arise while implementing the new board portal, having a dedicated point of contact gives you and board members confidence that questions will be answered quickly and properly.



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## 3. What type of training is included, and is there an extra cost?

**Preferred Answer:** Training is included at no extra cost.

Training should be included at no cost with every board management software implementation, and this training should be customized to your unique board requirements.

Board professionals may not have time to sit through an hour-long group training session, so both group and individual sessions should be accessible. Many directors may not feel comfortable using a new technology unless they get an in-depth tutorial and can ask questions. This part of the implementation is important and needs to be flexible to accommodate the board's different needs. Without an understanding of the platform, engagement will be low and the solution will lose its purpose.

## 4. How are product updates handled?

**Preferred Answer:** The majority of product updates are automatic.

All software requires updates from time to time. Product updates targeting bug fixes, performing maintenance, or launching new features should be an automatic process for all web versions of board software. The experience should be frustration-free and users should be able to see the updates when they log in.

If your users are required to follow complicated steps when upgrading, there is a higher chance they will grow frustrated with the software. On mobile apps, any new releases or upgrades should be well-communicated and only require the touch of a button. Additionally, users should be able to set up automatic upgrade settings.



## 5. How much control does an administrator have to make changes, such as adding new groups or users, or changing subscription levels?

**Preferred Answer:** The board administrator has ample control.

A common problem that many board management software users face is that when a change is required—such as adding new users, setting up new security permissions, or creating a new group—the IT department or the software vendor needs to do it. This creates a bottleneck in workflow and can decrease your efficiency instead of making things easier.

Make sure your new board management software provider puts control in the administrators' hands to eliminate any potential hold-ups.

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## 6. Are there additional costs for making changes to the board software subscription?

**Preferred Answer:** No costs unless there are substantial changes.

There are often changes in the number of administrators, committees, ad hoc committees, and board members who will use the software. Sometimes, you may wish to grant temporary access to a user, such as an advisor or executive team member. Those changes often cannot be anticipated before implementation, which means that your board management software may need to adjust over time.

You'll want to make sure that as your needs change, your board software provider will not 'nickel and dime' your subscription by adding annual costs for additional users or groups.

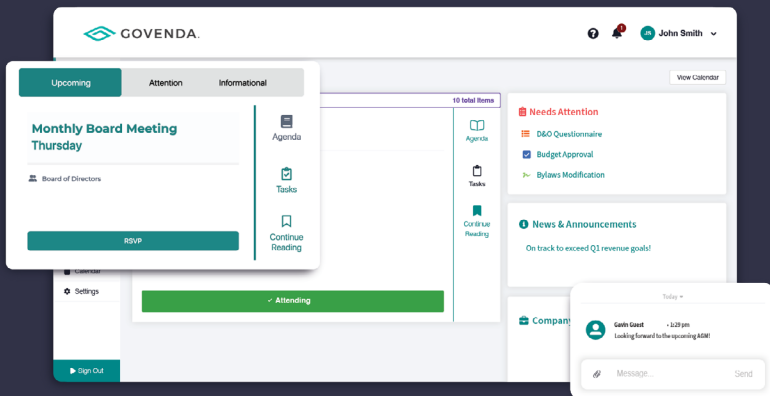


## How to Overcome Board Portal Resistance

Enacting significant change in the boardroom is rarely easy, and it can be particularly difficult for directors to adopt a new board management solution when they are used to established practices. Some directors aren't comfortable with new technology, while others struggle to find time to learn a new system.

Here are some tips to keep in mind when working with a board of directors that has mixed feelings about switching to new board management software:

- Find board management software with features that align with and solve the board's needs.
- Consider rolling out the new software slowly, so that directors can learn new features on their timeline.
- Partner with the provider to offer training and support.
- Understand that there may be late adopters who will likely start using the software once they see how it simplifies communication and processes.



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