

Successful Board Portal Adoption Guide

Tips and tactics to help your board of directors love their new board portal software

With continuously changing technology and new ways to distribute technology, how do you know the best way to implement a board portal with optimal adoption and approval rates? This checklist helps to make sure you ask the right questions when determining the best board portal provider for your company to help ensure 100% board portal adoption by your board of directors.

This checklist helps determine the best approach to training for your board, outlining your transition schedule, how to identify and leverage a board portal champion on the board of directors, and scheduling communications with board members.

1. Determine Your Training Approach

- Make a list of users, their roles, and technical skill level (tech savvy, average tech users, tech challenged).
- Schedule group sessions. Sessions are optional, but should provide a variety of dates/times for your board members to log in for a remote training session.
- Personally reach out to technology-challenged board members and offer to set up individual training sessions. These sessions should be offered by your board portal provider but, depending on comfort levels, you may want to designate an internal training administrator.

2. Outline Your Transition Schedule

- Decide how long you will run your current board material distribution process in conjunction with your new board portal. For example: one meeting, two quarters, etc.
- Set specific dates for your board portal rollout/ transition. These dates should include board member access, first meeting, and old system cutoff dates at a minimum.



Successful Board Portal Adoption Guide

3. Identify & Leverage a Board Portal Champion on the Board of Directors

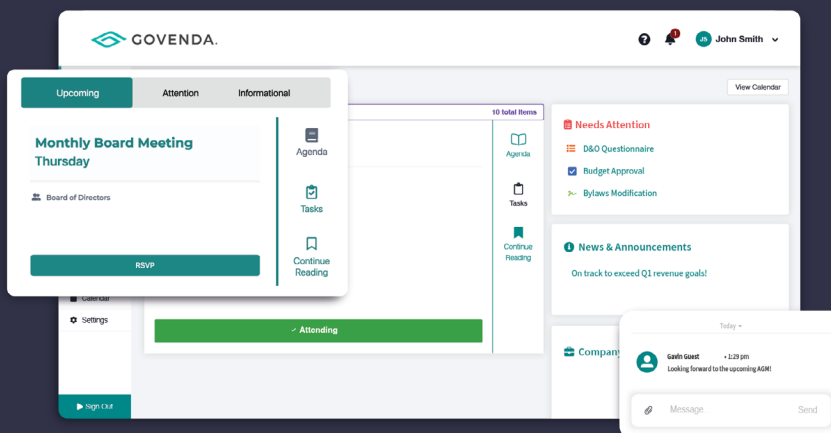
- Identify at least one, but possibly two, board portal champions.
- Reach out to each board member and schedule individual training sessions in advance of the other board members.
- Request that the board portal champions(s) introduce the board portal from a board member perspective. Ideally, this should be done at least one meeting in advance of the rollout.

4. Schedule Communication with Board Members

Set dates for the following pieces of communication:

- Board portal vendor decision.
- Implementation timeline (including training, rollout, and cut-off date for current systems).
- Training schedule.
- Resources for your board members: usage guidelines, support emails and phone numbers, and board champion contact info.

Work with your board portal vendor to create the above-referenced pieces of communication. Your new board portal should have example emails and templates that you can use.



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

[Schedule a Demo](#)

GOVENDA