



## Board Portal Buying Guide

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**The top 10 things  
to assess.**

aprio



## Why is everyone shifting to a board portal?

Years back paper board binders being heavy to lug and costly to produce and courier was a major motivator for companies to go paperless. Today, there are more modern drivers making boards adopt board portals: security and efficiency.

*"The use of purpose-built content sharing and distribution portals has become a common practice for sharing sensitive documents with corporate directors in preparation for board meetings."*

**Gartner, September 2014**

Emailing board documents or sharing with free editions of software like Dropbox or Google Drive poses real security risks. On the efficiency front, many boards are seeking to best engage high-contributing directors, which means offering online convenience. And for organizational efficiency, corporate secretaries and administrators are seeking automation tools to perform their work in less time as governance demands grow.

# What is a board portal?

Everything you need to run more efficient board meetings together in one place.

In case you haven't already used board portal software, it's like a web application that executives and directors log into to perform their role for an organization's Board of Directors.

A board portal offers confidential access to board materials, past and present, and provides tools that make it easier for administrators to prepare for board meetings and conduct committee activities. Board portals also improve information flow to and between busy board members even as they travel.

## TOP RANKED BENEFITS OF BOARD PORTALS



### Instant updates.

Same-time delivery of sensitive updates and document revisions to boards at any time, regardless of location.



### Centralized access.

Access meeting materials, communications, policies, bylaws, and archives within a highly reliable, secure portal.



### Convenient prep for directors.

Mobile access from anywhere.  
Online note taking and collaboration.



### Faster prep of board packs.

Efficiently produce and distribute board packages, without paper waste and cost.



### Efficient board meetings.

Better engage directors in agenda, and save time on meeting setup.



### Data security.

Safeguards against data leaks with ability to clean swipe data off lost devices.

# Evaluating a Board Portal

There are many different board portals available on the market. How do you choose one that is the right fit for your organization?

As Gartner reported in their Market Guide for Board Portals, "The majority of boards have very similar processes, and board portals have very similar feature sets." With most board portal software performing similar functions, it's very important to look at service, pricing and track record serving organizations like yours.

## TOP 10 THINGS TO ASSESS WHEN BUYING A BOARD PORTAL

When evaluating board portals here are some key things to assess to find a tool that's right for you.

### 1 Board Administration & Management

Explore how a board portal eases the process for administrators to prepare for board meetings and provide updates to directors when dates or documents change. Consider the routine effort you take today and enquire about what you can automate.

### 2 Director Access & Collaboration

A principle function of board portals is to provide timely, transparent access to board information. Learn about the different products approach and user interface to making information access easy. What will be intuitive for your board?

IS IT EASY TO USE?

### 3 Mobility & Engagement Convenience

Travel is a routine part of daily life for many directors and executives. Both for recruiting high-contributing board members, and for keeping them engaged, technology matters. Explore the conveniences you can offer mobile directors from tablet apps, to on and offline access and support for remote approvals.

### 4 Security

IPAD, ANDROID, MICROSOFT APPS?

Safeguarding the confidentiality of board documents and communications is a key driver of shift toward board portals. Consider both the security of board information in a portal and making access secure but simple for directors.

### 5 Getting Started & Adoption Ease

Software has no impact on efficiency or security unless it is adopted by your whole board. Understand the help a vendor offers to take your board information and schedules online and engage support users with training and communication.

### 6 Technology Innovation

How can you ensure the tool you select today will evolve along with governance best practices and the needs of your organization. Ask about future product updates and your voice as a customer in product development.

### 7 Reputation & Service

Next to product ease and reliability, service is the biggest deciding factor on whether customers are happy with a software vendor, or quickly move on. Talk with peers using the product. Ask about their service experiences, and how issues are resolved.

### 8 Support

GET REFERENCES

Because a board portal is used by some of the most influential and time-starved people in your organization, it is paramount that help is highly professional and useful. Consider calling a vendor's support line to test the support you'll receive.

### 9 Affordability

While functionality of board portals may be comparable, there is variation in pricing. In particular, some vendors have extra costs for additional committees, training or for amounts of data storage. Ensure you ask about starter fees and all possible add-ons.

### 10 Best Fit Overall

Going through a software assessment process you are exposed to a vendor's people, marketing, experience their response to questions and witness their interaction with your team. Consider which vendor gives you the sense of a best fit?



Not sure how to make the right decision? Try our Board Portal Assessment Checklist



## BOARD PORTAL ASSESSMENT – TOP 10 CRITERIA CHECKLIST

Conduct a smart, efficient board portal product comparison with this simple checklist.

### Scoring

- 1 = does not meet requirements
- 2 = meets requirements
- 3 = exceeds requirements in a useful way

	Vendor A	Vendor B	Vendor C
<b>BOARD ADMINISTRATION &amp; MANAGEMENT</b>			
Board package prep – how do administrators set up board packages and update them after the initial draft?			
Director alerts – how are directors notified when new information is available?			
Meeting scheduling – What steps does it take to schedule and reschedule a board meeting?			
Calendar outlook – Is there a calendar view to easily look ahead or back at board activities in the year.			
Manage contacts and committees – Do administrators have control to add or delete contacts and committees, and easily assign individuals to committees?			
Individual access – Can I limit document access to certain groups or individuals such as a committee?			
<b>DIRECTOR ACCESS &amp; COLLABORATION</b>			
Board material review – How do directors and executives access the board calendar, current and past board materials?			
Search – How can directors and administrators search for information – by date, keyword, committee name?			
Annotation – Can directors add notes and highlight documents privately?			
Annotation sharing – Can annotated documents be shared?			
Mobile access – In addition to a desktop edition, what type of tablet editions exist (e.g. iPhone, Android, etc)?			
Multiple boards/centralized access – if directors belong to multiple boards can access be centralized with single sign on?			
Offline access – how can directors and executives access information without wifi?			
Browser choice – are directors and administrators limited on which browser they can use?			
<b>BOARD DECISION MAKING &amp; TOOLS</b>			
Voting – can the Chair or committee leaders broadcast a survey for board votes on a decision? Can the survey support director and board assessments?			
eSignatures – can Directors sign documents remotely?			
Expenses – Can directors submit and track expense payment through the software?			
Multiple languages – are all the languages we need supported?			

REPORTING			
Track board activity – are reports in place to monitor board member logins, meeting preparation and meeting attendance?			
Compliance reporting – is there sophisticated search ability to pull data needed for audits and compliance reports?			
Self-serve access – are reports provided “out of the box” for easy access?			

SECURITY			
Data security – how is data protected from loss or hack?			
Data residency – Does the vendor have data centers? Do customer have a choice of location for data residency?			
Sign in – What are the sign-in requirements? How is security balanced with director ease of access?			
Remote data deletion – if a director’s device is lost or stolen can communication be wiped remotely?			
Has the software undergone a formal third-party security evaluation such as ISO 27001 or SOC 2?			

GETTING STARTED & ADOPTION EASE			
How does the vendor help ensure ease and adoption at the start of using a board portal?			
Is there support for the first board meeting?			
Is there help with uploading archival documents or setting up filing structures to get started?			
How will your corporate secretary/administration team get trained?			
How will executive and directors get trained and supported in adopting the board portal?			
What about new features or new directors who join – is training continuous?			

TECHNOLOGY INNOVATION			
How often do you release new features?			
How are customer requests incorporated in your product development?			

REPUTATION AND SERVICE			
How many years have you been in the governance and technology space?			
What is your customer loyalty record?			
What other customers do you serve in my industry / of my type (e.g. non-profit, government, public)?			
Can you provide reference contacts?			

SUPPORT			
How does the vendor stay in touch with customers, personally, over time?			
Has a recent customer satisfaction survey been conducted and what were results?			
What are support hours and support response times?			
How can users submit a support request? (email, phone, chat, etc.)			
Where is your call centre?			

AFFORDABILITY			
What is the software license cost for a board (how many members)?			
Are all premium features included in the cost provided or are there product editions with different costs?			
Is there additional cost for committee groups or other sub groups?			
Is there additional cost for offline use or for tablet applications?			
Are there any other add on costs – for example reports, data storage etc?			
What is the cost of implementation?			
Is training included for getting started?			
What about ongoing training for new directors or new features?			
If applicable – Is there special pricing for not-for-profit clients?			

OVERALL BEST FIT			
What is the total score for each vendor?			
Looking at how you've scored each vendor so far, which vendor do you believe is the best fit? (1 = not confident of fit, 2 = reasonably confident of fit, 3 = most confident of fit)			
Best fit – considering your experiences with each vendor's people, marketing and communications, which feels the best fit (bonus 3 points).			
TOTALS			

**Best of luck with your selection.**

Consider the Aprio Boardroom – we have a 99% customer loyalty record.

[aprioboardportal.com](http://aprioboardportal.com)

## **EFFICIENT BOARD MEETINGS & EASY BOARD COMMUNICATION**

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Discover why hundreds of admins and board members love Aprío. We make good governance simple and affordable.

The Aprío board portal helps organizations large and small to efficiently run board meetings, keep directors up to date, and keep information secure. Aprío provides premium features without premium pricing, all delivered with unmatched service.

## **GET IN TOUCH**

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