



How this board switched from paper to portal to increase efficiency.



BlueShore Financial

Location: Vancouver, BC

Established: 1941

Profile: 13 branches,
40,000 members, \$5.7B in
assets, 370 employees.

It can sometimes feel like every board has already gone digital.

It's true that plenty of boards have embraced board portal software, but many are still making do with patchwork solutions like Dropbox and email. A few are even managing meetings and board communications the old fashioned way: with couriers and towering stacks of paper documents. Either way, preparing multiple copies of documents, shared via email or courier, is costly and time consuming.

Even worse, updates to the board sometimes get lost. Sorting out late or missing documents at every board meeting cuts into time better spent on more important agenda items.

The good news is that it's not too late to take the plunge and implement board management software. The better news is that switching to the Aprío board portal makes your board more efficient and keeps your documents secure, and the transition is easier and smoother than you think

The problem: board management inefficiency

Prior to using Aprío, administration staff at BlueShore Financial spent many hours preparing paper copies of information for directors prior to board meetings and board committee meetings. It wasn't unusual for them to photocopy more than 150 pages of material, and sort the copies into 18 hard copy binders.

Staff would then courier nine binders to directors, and distribute another nine internally to management and staff.

If information changed or had to be added before the meeting, staff repeated part of this cumbersome process so that everyone received the revised or additional documents. When it came time for the next board meeting, they'd repeat it all over again.

Because individual directors would make one-off request for updates in between meetings, there was always the risk that BlueShore Financial wasn't updating their directors equitably.





Key results:

Significant reduction in prep time for meeting packages

Enhanced security with login authentication

More timely Director updates

**The solution:
Aprío board portal**

BlueShore Financial wanted a technology solution to provide accurate information and an improved service to directors and executives. They aimed to improve efficiency, and ensure governance and the equitable distribution of information.

They chose Aprío’s board portal because it allows timely and secure online sharing of corporate documents, and information to be sent to all directors at once rather than by random requests. During meetings, directors log in to Aprío for instant access to information without having to leaf through stacks of paper.

Between meetings, board members can find information, like meeting minutes, or upcoming meeting agendas and board materials, quickly and easily on multiple electronic devices.

**Paperless convenience:
the impact**

With Aprío, BlueShore Financial is running a better board and better board committees.

- **Timely updates, easy access and collaboration** – Aprío alerts directors automatically with meeting dates and updates, giving them instant access to meeting materials wherever they are. Directors and executives can review and annotate documents, and collaborate privately or publicly on decisions in real time.

- **Mobile convenience** – BlueShore Financial can provide information to the directors faster and far more efficiently. They can switch seamlessly between desktop, laptop, or tablet to see the most current documents. No more paper copies.
- **Easier administration** – Staff spend far less time preparing meeting packages and keeping directors engaged and up to date between meetings
- **More security** – Information that was previously stored on the BlueShore Financial network is now fully secured, requiring login authentication for access.

“The efficiency of providing Board information to our Directors has improved immensely using Aprío. Staff time in preparing meeting packages has been greatly reduced. The speed at which the Directors can obtain information has also vastly improved. Aprío has made our governance practices so much easier and more effective.”

ELAINE HASEMORE, ASSISTANT TO THE BOARD OF DIRECTORS, BLUESHORE FINANCIAL



Find out more

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Aprío makes 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. Visit aprioboardportal.com to learn more.