



What To Ask Before You Buy

Comparing Board Portal Software Options

What to consider

Most boards have the same goals when it comes to increasing efficiency:

1. Streamline meetings
2. Reach consensus easily
3. Keep data secure

Board portal software can help you accomplish these goals, but not all options on the market are created equal. Whether you are about to purchase a board portal for the first time, or you're thinking of switching providers, consider asking yourself our 6 key questions as you evaluate your options.

Q1. What kind of training will I get?

Learning new software can be daunting, especially if this is the first board portal you've ever implemented. Beyond the basic functions of software, you want to make sure you're maximizing every feature to the benefit of your board.

Before you start, ask the board software vendors if they provide:

- One-on-one training for both directors and board administration
- Continuous access to training, even after the onboarding stage
- Regular webinars to help master and maximize your use of the software.

Q2. Who answers the phones when I call for support?

Are there software pros on the other end of the phone who are available 24/7?

With Aprio, when you call you will be immediately connected with one of our employees - a tight-knit group that can help answer any questions and solve problems instantly.



Karen Peacey

Director, Customer Relations

When you contact Aprio, you'll talk to a real person who cares - 24/7, 365 days a year.

Q3. How secure is the software?



Aprío understands that when storing and sharing confidential documents security is crucial. Our board portal provides layers of advanced security and gives you the power to control access and guarantee compliance.

If a device is lost or stolen, you can remotely wipe it. Our international servers adhere to independent third-party requirements for security certification.

[Read about our full security practices.](#)

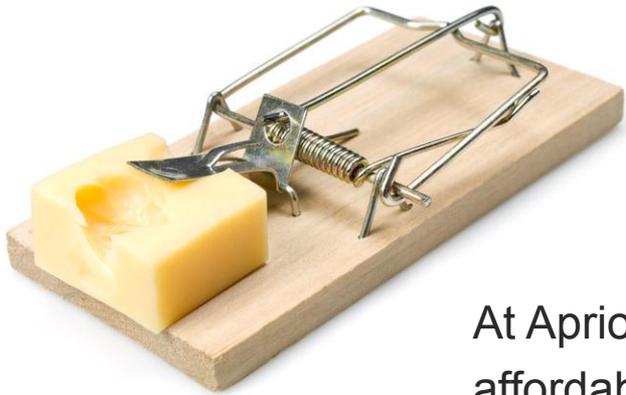
Q4. Will the fee structure change as we grow?

During a demo the price of many board portal software options seems appealing. Once you start adding administrators and committees or using more data storage the cost starts to balloon and suddenly more expensive than the product you tested.



Aprío's board portal delivers premium features, including mobile and desktop versions, without premium pricing. You automatically receive 12 user licenses with our base package, with the option to add additional users as your needs change while only paying for users you add.

Q5. Do I get what I see in the demo?



Known as the “bait and switch” - some board portal software companies show you deluxe package during the demo, while quoting you a price that actually reflects their most basic offering.

At Aprío, we believe in making good governance simple and affordable for everyone. All of our users get access to the same full suite of features.

What you see is what you get, the all-in-one product you see during the demo is the same one you will use after you buy.

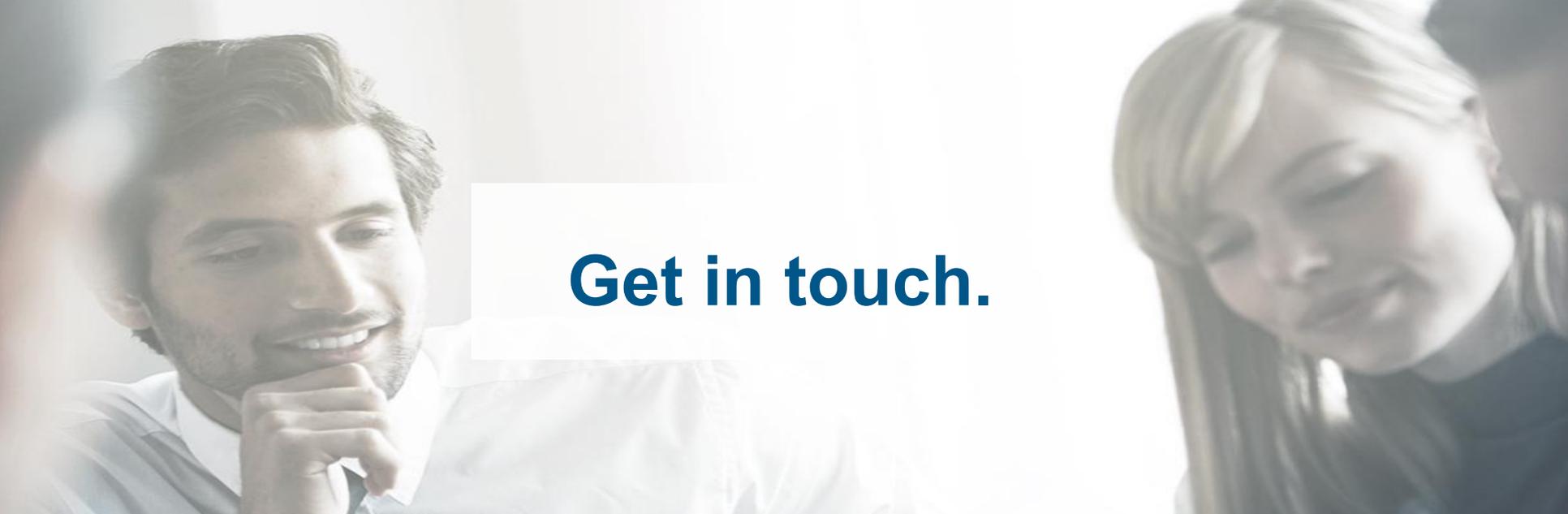
Q6. Can someone vouch for the software?

The best way to evaluate any software is to talk to a real user.

Our clients are our best referrers, a testament to how happy they are with Aprio software. [Read some of our third-party reviews of our board portal.](#)



We are happy to share testimonials of clients in your particular industry, who can speak to how our board portal can eliminate paper and increases efficiency, for a price that's less than you'd expect.

A man and a woman are shown in a professional setting, likely a meeting. The man on the left is smiling and has his hand to his chin, while the woman on the right is looking down. The background is bright and out of focus.

Get in touch.

We'd love to hear from you!
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