



# Why stick with Aprío? Meridian Credit Union evaluates modern board tech.

Meridian™



## Meridian Credit Union

**Profile:** Meridian Credit Union is Ontario's largest credit union and the third largest in Canada. Meridian serves 350,000 members from a network of 91 branches and 31 commercial banking centres. Meridian has \$21.6 billion in assets under management.

Meridian Credit Union had just earned a governance award for *Best Approach to Achieving Effective Board and Committee Operations*. Still, they didn't want to get complacent about how their board operated or their board portal technology.

This case study with Meridian Credit Union shares lessons from a board that recently evaluated which board technology is best for credit unions today.

## The challenge

Almost a decade after first choosing Aprío to simplify board meetings and streamline communication with directors, Meridian sought to reassess which board portal on the market best supported their evolving needs to give their directors convenient access to their ever-expanding board information.

As Meridian evolved, board materials shared for a single board meeting could include more than 500 pages of pre-reading. The organization was also becoming more complex and needed a modern way to make it easy for directors to access information, search for answers, and to do board meeting prep offline, such as while on a flight.

Alongside those new needs, the credit union continued to require data security, efficient meeting preparation, and exceptional support which they'd come to rely on from Aprío.

## The approach

Meridian began an evaluation of the top board portal technology on the market, seeking to reassess which portal was the right fit for them to run their larger organization.

*“Meridian is an evolving organization. Along the way, we'd outgrown how we originally set up Aprío. We chose that moment to reassess which board portal technology was best for us.”*

**KATE MACLEOD, MERIDIAN CREDIT UNION  
GOVERNANCE SPECIALIST**

Their board members joined the board administration team in doing a thorough evaluation of Aprío, Diligent, and BoardVantage.





**Key results:**

*Speed of board updates*

*Faster search*

*Offline access through Aprio app*

*Security certainty*

**The impact**

Although Meridian was prepared to make a change if needed, it turned out that Aprio was still the best fit for their needs. With guidance from the Aprio team, Meridian evolved their use of the board portal to give directors more convenient access to materials.

As Kate MacLeod, Meridian Credit Union Governance Specialist explained, “We discovered the most streamlined way to operate our board with Aprio and put it in place. Board members are coming to meetings better equipped and it’s resulting in better conversations.”

**Better board information access**

The Meridian Credit Union governance specialists no longer prepare the board package in one large file. Now, they upload individual reports to Aprio, enabling them to use quick links from the board agenda to relevant information and improve search speed when seeking board answers or when gathering data for regulatory reporting.

If there’s a change to one board report, the governance team can quickly make the change and instantly provide directors with a link to the latest version.

**Engaged and prepared directors**

Offline access was a critical requirement from Meridian directors. Now they use the Aprio tablet app to review board materials on and offline, including in airplane mode.

Hyperlinks from agenda items to board documents and Aprio’s rapid search functionality have also boosted the convenience of board meeting prep.

**Calendar booking**

Directors expressed that they wanted to streamline board meeting date selection and halt the email swirl. Meridian now uses the Aprio survey tool to share meeting date options and make best-for-most calendar bookings.

Meridian found that Aprio’s calendar features were the best of all portals evaluated to streamline the scheduling and rescheduling of meetings.

**Member management**

Meridian wanted a simple way to add and remove members and give different information access – read only or full upload/edit rights – especially for committees. Aprio makes this simple, supporting Meridian’s goals of making information transparent with utmost security.

**Security certainty**

Strong security was one Aprio strength that originally led Meridian to choose it. Ten years later, Aprio continues to lead the pack with rigorous data security, including the ability to remotely clear data from a director’s lost or stolen tablet or computer.

*“After our reassessment of other board portals, we’ve confirmed that Aprio is still the best fit for credit union boards in terms of its capabilities and dollar value.”*

**KATE MACLEOD, MERIDIAN CREDIT UNION GOVERNANCE SPECIALIST**



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Aprio makes good governance simple and affordable. The Aprio board portal helps organizations large and small to efficiently run board meetings, keep directors up to date, and keep information secure. Aprio provides premium features without premium pricing, all delivered with unmatched service. Visit [aprioboardportal.com](http://aprioboardportal.com) to learn more.