

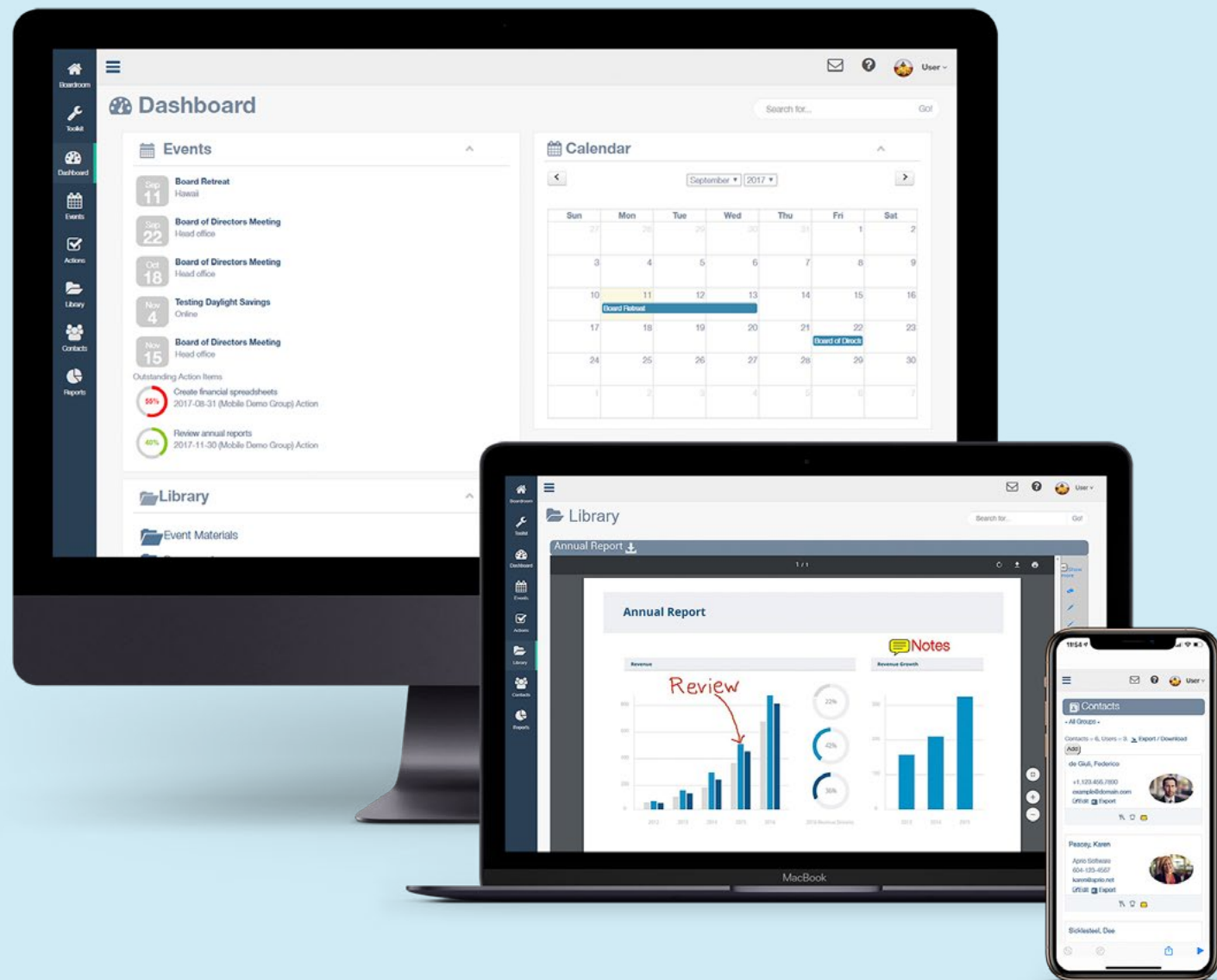


**Board Portal  
Re-Assessment Guide**

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**The top 10 things to  
evaluate at renewal.**

aprió



## Are we using the right board portal?

For some boards, the board portal in place is a remnant of who was on the board at the time it was purchased. Every few years, it's worth reassessing if your board portal is still the best fit for your board's current security, feature and budget needs.

*"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**

Data breaches are becoming more frequent and more severe and not all board portals offer the same caliber of data security. Neither do they offer the same efficiency including mobile technology, collaboration tools or time-saving search capabilities for directors. Boards are wise to periodically reevaluate their technology and make sure they are getting all they need, at the most competitive price.

# Why reassess our board portal?

It's worth staying aware of modern technology and the potential benefits for your board.

Many organizations have a policy to reassess their technology every few years. It's good practice, even if it helps a board confirm that the board portal technology in use remains the right fit. And if you're worried that switching or retraining would be a lot of work, ask vendors about their services to help if you do change tools. Some partners can help you make the switch in just a few weeks – probably before your next board meeting.

Still not sure it's worth the change? Consider if you are getting signs of dissatisfaction signalling it's time for a board portal switch.

## FIVE SIGNS TELLING YOU TO SWITCH



### Meeting prep is overwhelming.

Board administrators aren't getting time saving technology to distribute board packages and updates simply and quickly.



### Directors are frustrated.

Board members call or email asking where to find board materials or complain the technology in place isn't easy to use.



### Board engagement is slow going.

Are directors well prepared for meetings with convenient information access, search and login ease? Can you track portal usage?



### Renewal bill raises eyebrows.

Board portal costs might be out of step with budgets, especially with charges for "add-ons" like committees, training or extra data.



### Cybersecurity feels uncertain.

Conversations around board data security are anxious and there's an unspoken need to re-examine your technology's data protection.

# Board Portal Reassessment

There are many different board portals available on the market. How do you make sure that you're using the right one for your organization?

You're already familiar with how a board portal generally works. However, not all board portals offer the same tools to make board meetings efficient or board information secure. You'll need to do a thorough comparison of tools available. Take a close look at what's included in pricing, investigate how cybersecurity is protected, and consider 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 how much time you can save.

# 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

IPAD, ANDROID, MICROSOFT APPS?

### Security

Safeguarding the confidentiality of board documents and communication is a key motivator for boards to use a board portal. Select software that both secures board materials and makes accessing information simple and secure for directors.

# 5

CAN YOU CLEAR DATA FROM LOST DEVICES?

### Getting Started & Adoption Ease

Software has no impact on efficiency or security unless it is adopted by your whole board. Understand the help that vendors offer to get your whole board using technology for security and efficiency. Do they provide personal training for both board admins and directors? Do they give guidance on portal set up?

# 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

GET REFERENCES

### Support

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

### Pricing

It's buyer beware when it comes to board portal pricing. Be on the lookout for vendors that demo full-featured software then share pricing for lite products. Ask about all the possible add-on fees including for additional administrators, committees, reports, training or for data storage.

# 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?



Need help doing a quick comparison? Use the Board Portal Evaluation Checklist



## BOARD PORTAL EVALUATION CHECKLIST

Conduct a smart assessment to be certain you choose the board portal right for you.

### 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?			
Can there be more than one user with administrator privileges?			
<b>DIRECTOR ACCESS &amp; COLLABORATION</b>			
Board material review – How do directors and executives access the board calendar and library of board materials? Check that it's easy to navigate.			
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/one-stop access – can directors access information for multiple boards using the portal with one login?			
Offline access – how can directors and executives access information without wifi?			
Browser choice – are directors and administrators limited on which browser they can use?			
Login ease & security – does the portal offer single sign on using Microsoft or Google credentials while ensuring two-factor authentication?			
<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			



**Compare your portal with Aprio.**

Begin your reassessment with us. Aprio is known for our helpfulness!

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

# Why choose Aprio?

Top reasons our customers choose us:

- 1 Personalized, expert help** – Anytime an administrator or director contacts Aprio, they reach a skilled board assist. We listen and solve needs with outstanding helpfulness.
- 2 Industry-leading security** – Layers of advanced security protect board data, control access and empower boards to remotely wipe data from lost or stolen devices.
- 3 Guaranteed board efficiency** – Boards save time preparing for meetings. Directors engage more with easy access to materials. Data searching is faster for regulatory reporting.
- 4 Complete portal capabilities** – Even small organizations and nonprofits get Aprio's full features. You can use them all right away, or start with a few and use more over time.
- 5 Inclusive pricing, no surprises** – Our pricing is transparent and includes training, committees, multiple administrators and unlimited data.

## HEAR WHAT APRIO USERS HAVE TO SAY



*"I'm getting praise from directors on the switch to Aprio. Making the change proved far easier than we thought"*

FORT MCMURRAY AIRPORT AUTHORITY



*"New directors who haven't seen Aprio before are immediately impressed with how quickly they can get up to speed."*

YOUR NEIGHBORHOOD CREDIT UNION



*"I cannot believe how supportive the team at Aprio is. I have never received this quality of service from any other supplier. And they really do want to hear from their customers about what we want to see."*

TANDIA FINANCIAL



*"It gives our board and executives a level of confidence knowing our documents are confidential, secure and encrypted within Aprio."*

BRITISH COLUMBIA INSTITUTE OF TECHNOLOGY



## **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.

## **FIND YOUR BEST BOARD PORTAL**

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Share your board needs. See if Aprío is your best fit.

1-855-55-APRÍO (1-855-552-7746)

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