



# From BoardPaq to Aprio: How Centinel Bank found ease of use without compromising security.



## Centinel Bank of Taos

**Location:** Taos, New Mexico, United States

**Established:** 1969

**Profile:** Centinel Bank of Taos is a locally owned and operated community bank serving Taos County with three locations.

Family-founded and locally owned, the bank provides a full array of deposit and lending solutions for personal and business needs, while maintaining community interests at the forefront of its decision-making. Centinel Bank's board relies on efficient, secure access to board materials.

How does a community bank navigate a board portal transition when its existing solution sunsets? Centinel Bank needed to find a secure, user-friendly alternative that would support in-office and remote users.

This case study explores how Centinel Bank evaluated its options for a new board portal and chose Aprio for its security, ease of use, and exceptional value.

## The challenge

When Diligent announced it was sunsetting BoardPaq, Centinel Bank—like many BoardPaq users—faced an unexpected decision: migrate to BoardEffect or another Diligent solution, or take the opportunity to evaluate other board portal options.

"We decided we should also look at other companies and see how the different services compare," explains Leslie Mondragon, HR Officer and Vice President at Centinel Bank.

Instead of simply accepting the default migration path, Centinel Bank took the time to evaluate their options to make sure they were choosing the best solution.

## The approach

Security and privacy were top priorities for Centinel Bank—as a financial institution handling private data, they needed absolute confidence in their chosen solution.

Functionality and ease of use were also top of mind, as they needed a system that would work for both in-office and remote users. The team compared several board portal options, looking for a solution that would serve both administrators and board members effectively.

After their thorough evaluation, Aprio was the clear choice. "We found Aprio to be more intuitive, user-friendly, and also less expensive," Mondragon recalls. "We were able to find a solution that provided us with enhanced benefits for a lesser cost."



**Key results:**

**Secure platform for sensitive financial data**

**Time saved with automatic packet updates**

**Always-current materials—no more errors**

**Easy, quick transition to new portal**

**More self-sufficient, engaged board members**

**Responsive, expert customer service when needed**

## The impact

Since switching to Aprio, things have gotten easier for Centinel Bank—from board prep to how directors access materials to getting support when needed.

### **Easy transition, completed in weeks**

The move from BoardPag to Aprio proved easier than anticipated. There was no need for a period where both tools ran in parallel. After getting set up in Aprio, they were ready for their next board meeting.

“The switch was easier than expected, and I think we made the right move,” reflects Mondragon. “We’ve really been pleased with it.”

### **Time saved with automatic updates**

Previously, any time a manager updated a report, Mondragon had to be notified so she could manually rebuild the entire board package. Now, that extra step is gone.

“Any administrator can update reports, and Aprio updates the packet all at one time,” explains Mondragon. “The most current version is always what’s live, and I find that’s a huge time saver. There’s also less room for error because the files are updated, and then immediately the packet is updated to what’s current.”

### **Board empowered to work independently**

Aprio’s intuitive design means that everyone who needs to use it can do so independently—from managers posting reports to directors accessing materials remotely.

*“We found that through our review process, Aprio seems to be more intuitive, user-friendly, and was also less expensive. We were able to find a solution that provided us with enhanced benefits for a lesser cost. The switch was easier than expected, and I think we made the right move.”*

LESLIE MONDRAGON, HR OFFICER AND VICE PRESIDENT AT CENTINEL BANK OF TAOS

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