



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 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 BoardPaq 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.

The remote meeting feature has been particularly popular. The meeting link for anyone joining remotely is available right in the meeting details—one less step to communicate with board members.

“Not just for me as the administrator, but also for all our managers who are posting information for board review, they’re able to navigate the system independently,” Mondragon explains. “That makes my job much easier.”

Board members who also serve as administrators have noted they’re “seeing the advantages of how it’s an easier tool to use and preferring it to the tool we had previously.”

Customer service that stands out

The Aprio support team has made a strong impression on Centinel Bank from day one. The implementation manager provided excellent guidance during setup, offering different options to help the team accomplish what they needed.

“Customer service really stands out to me,” says Mondragon. “For anyone in an administrative role preparing board materials, it’s really helpful to know there’s someone you can call to get a quick response. The Aprio team is really accessible, and that’s something you don’t always get with vendors. I feel confident that if there are questions or challenges, they’ll help us through it.”

“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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