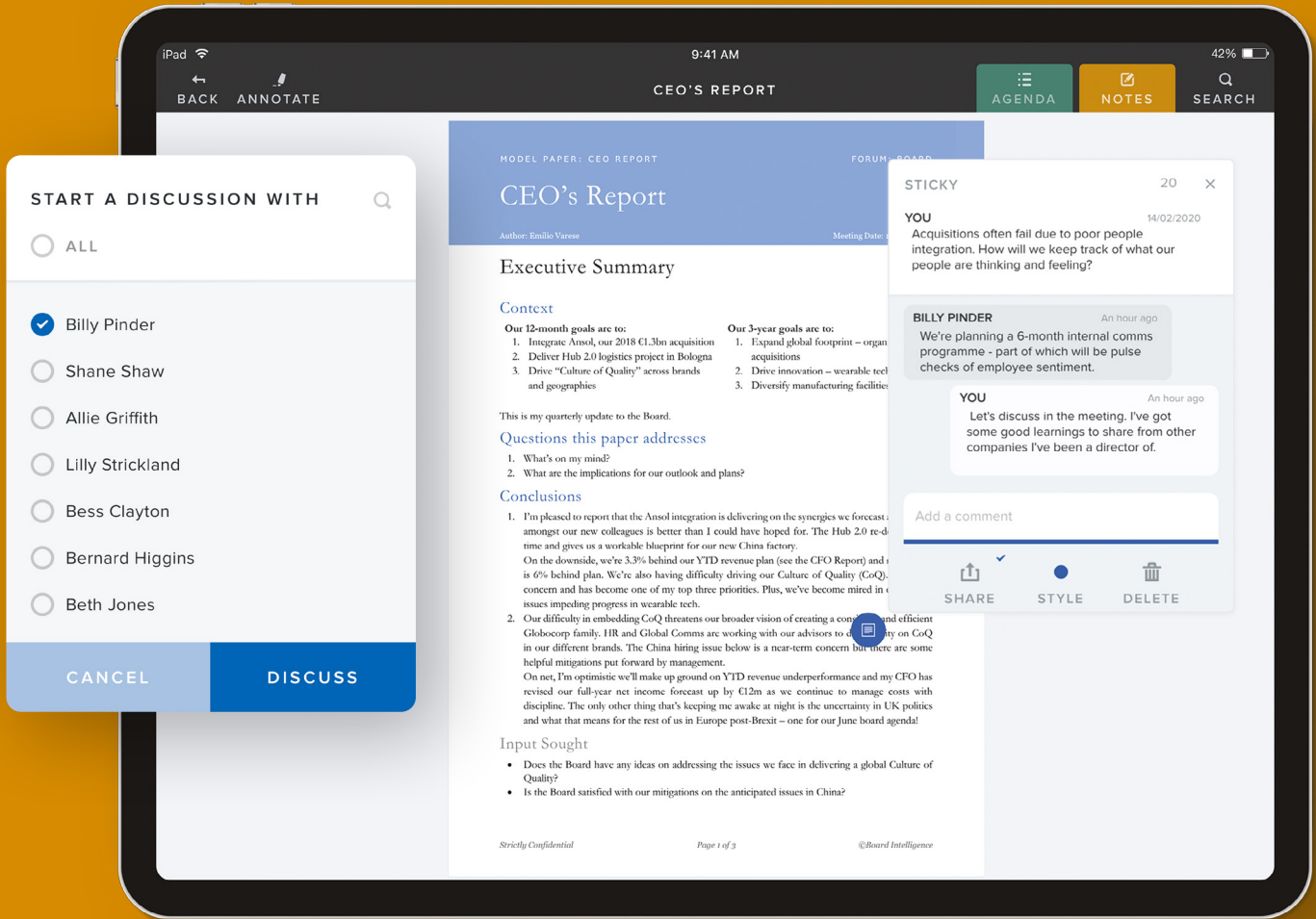# How to Deploy a Board & Leadership Portal Successfully

BOARD
INTELLIGENCE

THE DISCIPLINE OF FOCUS

"Easy...intuitive. A distinctive way to add value in the boardroom"
~ *President, CBI*

Why do you need a board portal?

Because you can't go virtual without one

A virtual meeting is harder, needs better preparation and demands better collaboration before the meeting to make the most of the time - and that is where the strengths of a board portal come into play.

All board portals will enable boards and leadership teams to securely access their meeting materials at any time and from any location in the world.

A few, such as ours, make use of smart navigation and annotation features to provide an easy way for board members to interact with their board materials. The board benefits from having access to information the moment it's ready, and organisations benefit from the peace of mind that their materials are secure and will not fall into the wrong hands.

Because board & leadership time is valuable

It's not an effective use of time for a director who wants to access information from a previous board paper to search through piles of paper, previous emails and multiple attachments or 250 pages of PDF. A portal makes that simple. Previous packs are always accessible and searchable.

Equally, enabling the board to question, clarify and challenge before the meeting – via the digital pack itself – should be

a hygiene factor for an effective board. Why wait to the meeting and get bogged down in issues that derail agendas and that could have been dealt with previously?

Finally, a portal is instant. When the papers are approved they are immediately available. If the facts change, so can the agenda and the papers. And in today's world that matters.

Because you will win back admin time

It's a curious boardroom paradox that those who compile and distribute board packs are often masters of organisation, yet just as often are forced to rely upon a manual process that's dreadfully inefficient, a process often maintained simply because Directors dislike change. That means chasing late papers, updating reports, printing, binding, and distributing the finished documents, only to start again because of a last-minute update... all these steps add up to a significant amount of time. And that's even before taking into account that many organisations do this 10 times per year.

Whether it's updating timings or waiting for couriers, these are hours upon hours that could be better spent reviewing papers, supporting authors to produce better reports, and adding value to the board. With digitisation, organisations can save up to 80% of the administration time every month, allowing you to concentrate on what truly matters.

Because cyber security isn't just for your IT team

Your IT department might be best in class, but it's not just hostile hackers you should be worried about. Unintentional human error is by far the leading cause of cyber security breaches — with over half of the incidents caused by employee mistakes*.

This includes everything from directors leaving confidential documents at the back of a taxi, through to simple mistakes such as sending an email with sensitive attachments to the wrong address. Some of the most important information an organisation produces is contained in its board materials, and the process of creating, collating, and distributing that information to board members is full of opportunities for a slip up.

Email, in particular, is often the primary means by which drafts, re-drafts, and finished documents are shared, and each step exposes organisations to the risk of human error. Strict processes and market-leading cyber security systems could be defeated by a single miss-sent email — yet, that's a risk numerous organisations take every month as they manually create their board packs.

An easy way to mitigate these risks is to automate the process with a board portal. Digitisation will take paper — and most of the associated emails — out of the equation, removing just as many opportunities for mistakes. And a good board portal — guaranteed by certifications such as ISO

27001 — will feature other security features, including remote wipe of missing devices, granular control over authentication and access rights, full audit logs, end-to-end encryption, and dedicated servers that don't rely on public, shared cloud systems.

Because it's costing you more than you think

There's a hidden cost behind every board meeting. And it's not just printing and couriering expenses: research we jointly conducted with ICSA shows even small charities will typically devote 20–25 days to the task for each meeting, at a cost of several thousand pounds. For the largest listed companies, the full amount goes up to over 100 days of preparation and a quarter of a million pounds.

From report writers battling with suboptimal sharing systems to board members unable to access the latest version of the board pack, time is by far the main variable of these cost figures. A board portal automating and simplifying the process will pay for itself, and then some.

* Source: Baker and Hostetler, 2019

Screen content:

AUGUST MAIN BOARD PACK

BACK ANNOTATE AGENDA NOTES SEARCH

TEXT DRAW HIGHLIGHT STICKY ERASE STYLE

COLOUR

Written Resolution Of The Board

Resolution for Approval

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Board Approval Signatures

Director A

Director B

Director C

Director D — Millie McCormack

Director E

Director F — Julia Hughes

Director G

Director H

Director I

Director J — Flora Smith

BOARD INTELLIGENCE

Pg.1

PAGES

Quote:

"It took me 5 minutes to understand how to use the Board Portal – it couldn't be easier."

~ Matthew Parker, CEO, Babble

Making your board portal launch successful

So you've decided that a portal is needed to ensure you can focus on what matters most as well as embrace virtual working but how can you make the launch successful? It's easier than you think.

1. Know your audience

In every business there are technology enthusiasts and technophobes, embracers of change and people who lovve the process they followed yesterday. The boardroom is no different. For every champion, there will be an objector, and for every early adopter, there will be the person you need to pull over the line. So, plan for it:

- Who's going to be less confident with the technology or worried about change? Involve them first and bring them on board as someone to test different solutions.
- Who's going to be a champion? Ask them to help others with tips, tricks, and how-tos through the first few months (more on this later).

Do everything to bring everyone with you, but don't let a lone voice stop the change the organisation needs. Board members are there to act in the best interest of the company — if it needs a portal for digital remote working, security, efficiency, or environmental reasons, or to help the board be more focused and effective, then these business imperatives must take precedence over personal working preferences.

2. Provide training in the form that suits

Whilst we have designed our portal to be completely intuitive, there is always some degree of familiarisation and training needed – and what that looks like will depend on the individual. Whether that is self-set-up, remote training & on-boarding or, occasionally, face-to-face induction - all should be on offer.

3. Get the tech ready before you need it. Test it. Then, go cold turkey

Many organisations think the job is done once they've procured the tech, and move on a little too quickly. But it's critical everyone's first experience is a great one. So, get the portal ready and try it out with some past packs. The technical setup from your provider should be straightforward and completed in under 24 hours.

Remember that the setup stage is not just a company-level IT matter. Challenges arise with individuals: so often, some directors have problems with their Wi-Fi, remembering their password for app store downloads, or other typical teething problems unrelated to the software but that throw rollouts off track. So, make sure everyone is set up successfully, and ensure everyone has secure (offline and online) access on the device of their choosing before you get anywhere near your first meeting.

Once you know everyone is properly configured and tested, pull the plug on emailing PDFs or paper copies. Those more concerned about the change may want to cling to your old processes, but, if you keep them going for even a month, you'll be doing it for the next year without even knowing — and will have destroyed your initial business case for the new ways. Change means change, so, once you're comfortable the setup is complete, pull the comfort blanket.

4. Understand the level of support you're looking for and who's going to provide it

Picking the technology that's right for you is a crucial first step but getting great ongoing support from your technology provider is just as important.

Ask those questions about the level of support you'll get:

- What's the jurisdiction of central telephone and web support? Will time zone differences, or potential local upheavals, prevent you from accessing it?
- Does it operate 24/7, and what's the typical response rates? Can you get immediate help on a Sunday night, when your board meeting is due to start first-thing next morning?
- What experience do support persons responding to your queries have? Are they generalists, or do they understand how boards work and what you and your users need?

5. Share best practice, tips, and tricks for the first 3 months

This is where your champions really come to life. 100% adoption is one thing, but great usage of all the features available to you is quite another. We all know that we leave a training session/launch remembering about 20% of the functionality we see.

So, over the first 3 meetings it's key to share success stories. For example:

"Here's how Jane shared a clarification question with Sarah before the meeting, using the annotation function."

"Here's how David compared and contrasted the results from this meeting pack with the last, using 2-screen mode."

"Here's how Miranda searched for the initial business case for the project from last year when considering whether we should agree to provide extra function using the search function."

It's the little things that make the difference between us using a piece of technology and us loving a piece of technology.

Implementing new technology with an audience that is not always tech-savvy can be a daunting task. However, we know that it can be delivered painlessly and easily – it's what we do every day.

At Board Intelligence we aim to get onboarding completed within 24 hours and our support teams are here for you and your Directors and leaders whenever they need us – from simple password resets to uploading board papers.

To find out more about the Board Intelligence Portal visit our website:

www.boardintelligence.com

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