Switching to Board Intelligence

We're experts in migrating organisations from all other major board portal providers to Board Intelligence.

Our experienced onboarding team will manage your switch seamlessly and ensure your organisation is set up for success using Board Intelligence. The below sets out our process for a smooth transition, as well as some FAQs to ensure you have all the information you need.

> *"Board Intelligence made it very easy for us to switch board portal provider, and it was completely worth it. We're so glad we took the plunge."*
>
> ~ Jason Wright, Society Secretary, Nationwide

Three-step transition process

1. SETTING UP YOUR PORTAL

Design and configure your board portal
This can mirror your existing setup, or our expert team can advise on a new structure. We'll also design your cover sheet to ensure it feels like your board pack from day one.

Transition existing board materials
Our team will advise you on which packs to transition, and explain how to securely upload historic packs quickly.

Agree security requirements
We'll capture your key security requirements to ensure we configure your portal infrastructure accordingly.

> *"We've had a 20–25% time-saving in creating board packs compared to our old board portal provider."*
>
> ~ Adam Jeffries, Group CIO, JTC

2. ONBOARDING YOUR USERS

Identify users and assign roles
We'll help you set up your users, to ensure the right people have access to the right information. And we'll devise a plan for how, and when, new users are introduced to Board Intelligence, even providing draft comms for you to use.

Training your users
We'll provide training resources so your administrators can navigate and configure the platform easily, and your readers are comfortable with logging in, making, and sharing annotations.

3. EMBEDDING THE PLATFORM

Ongoing account management
Our onboarding and account management teams will support you through your first board meeting and beyond, seeking feedback to ensure everyone is happy and gets the best from Board Intelligence.

Technical support
Our expert team of product specialists are available 24/7 every single day by phone or email to provide technical support to you and your users.

BOARD INTELLIGENCE

FAQs

Q: How many archive packs should we migrate? Who does this?

A: You can migrate as many files as you like, but most clients see a board portal transition as an opportunity to streamline the information on their readers' devices. Typically we see clients migrate the last 12 months of materials and download all other documents to their internal servers. For information security reasons we don't transition documents for clients, but our onboarding team are on hand to support this process, ensuring you have all the information you need and answer any technical questions.

Q: What format do the files need to be in to transition over?

A: Your files can be in PDF, Word, Excel or PowerPoint format. We recommend uploading historical packs as single PDFs—which is quick and easy to do—and then creating all new board packs by uploading individual files, so you can benefit from full agenda navigation.

Q: How long does a board portal switch take?

A: We can have you up and running on Board Intelligence in a matter of days, but recommend allowing 4–8 weeks for the switch process. This ensures your archive materials are transferred, and that your users have adequate time for training.

Q: How will you train my users?

A: Although our platform is extremely intuitive, you will have access to regular training sessions and a suite of resources to ensure that you get the best from Board Intelligence. Administrator training sessions typically last for 45 mins while reader training sessions are 15-30 minutes.

For more information on why other clients have chosen to transition to BI, please visit:

WWW.BOARDINTELLIGENCE.COM/SWITCH

Switch clients

★★★★★

"The best board portal I've used by far!"

READ OUR REVIEWS ON G2.COM

BOARD INTELLIGENCE

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