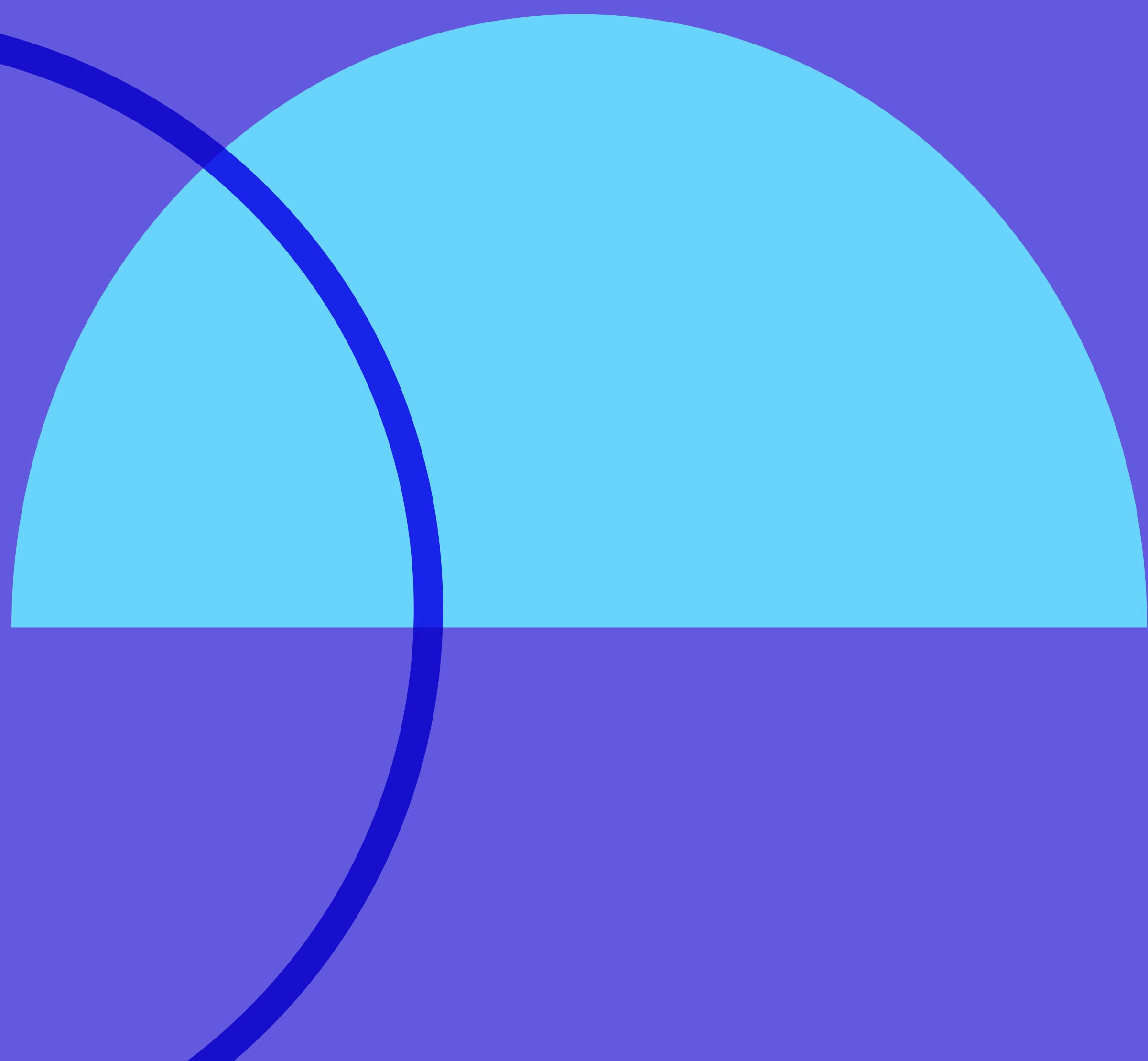
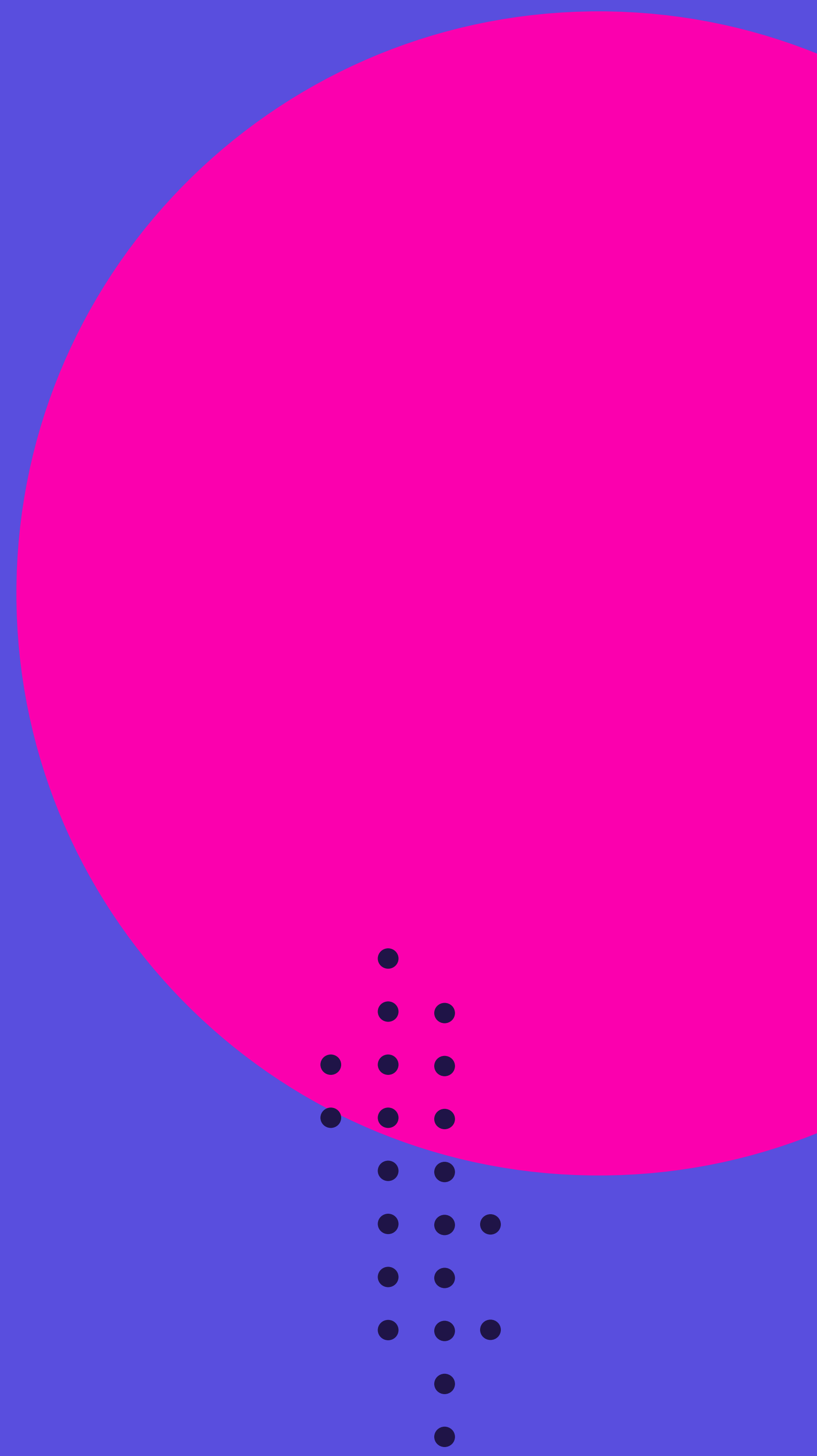




Implementation, Training, and Customer Success

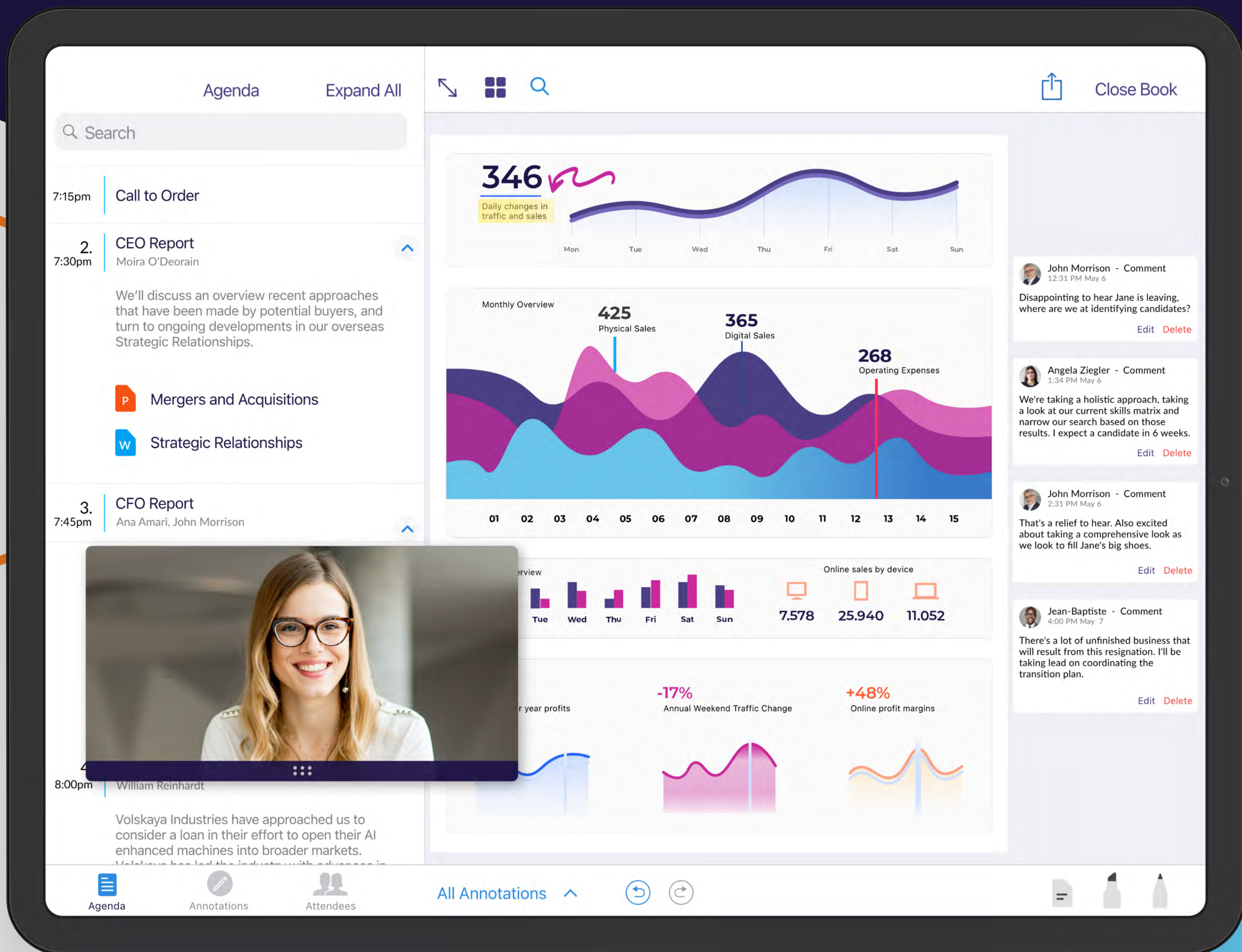


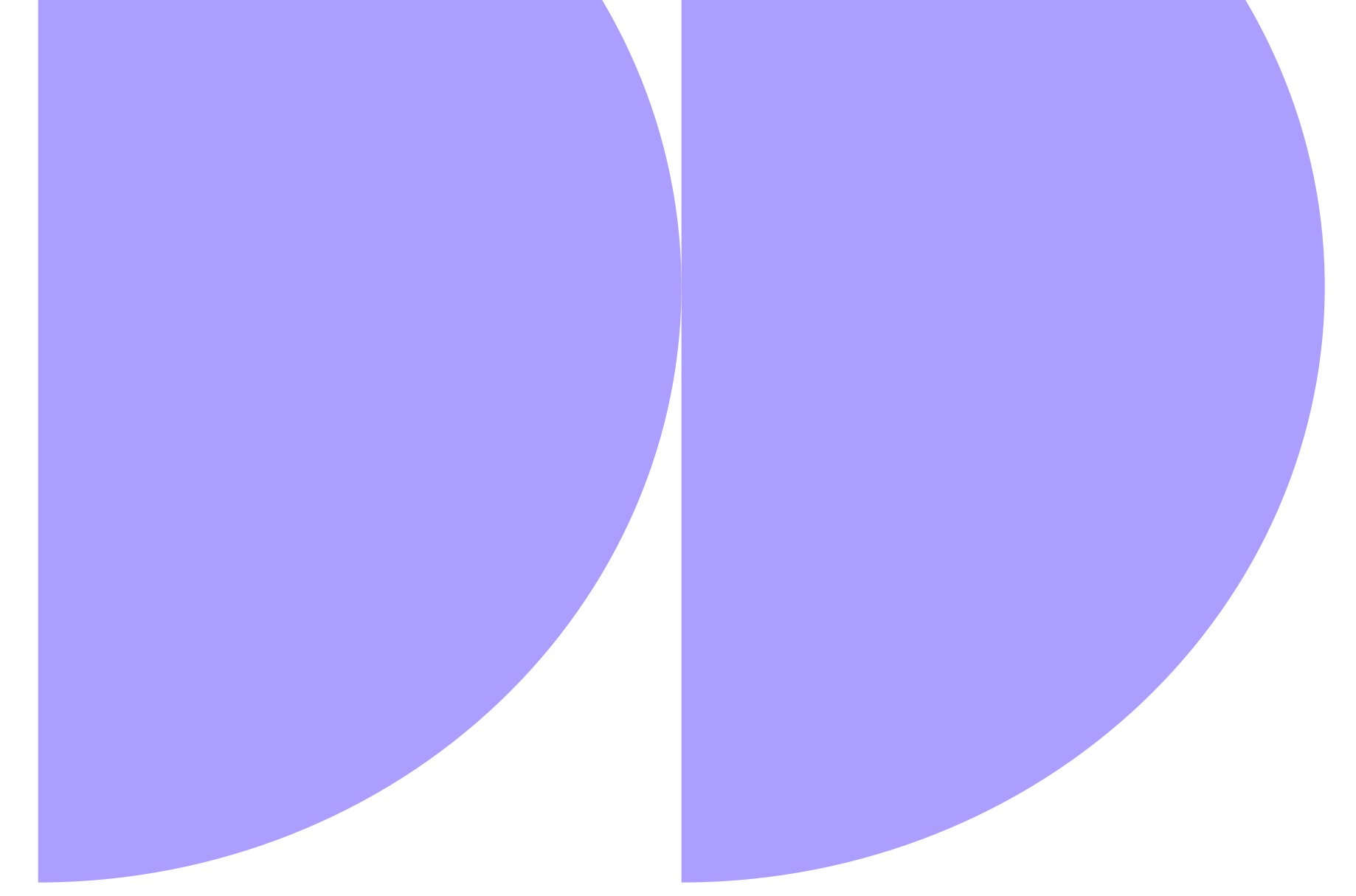
Overview

At OnBoard, we believe board meetings should be informed, effective, and uncomplicated – and that OnBoard customers deserve no less than award-winning service from our Implementation and Customer Success teams. As a team, we’re proud to partner with every customer to ensure every board meeting supported by OnBoard goes off without a hitch.

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Why We're Different

Committed to Your Board

The OnBoard board portal was designed to serve its users in a way that simplifies preparing, administering, and executing board meetings and all related activities. That “different by design” approach carries over to our Implementation and Customer Success teams. From Day One of your organization’s Implementation to every day beyond that, the OnBoard team is here to serve your board’s unique needs.

Experience that Matters

With more than 3,500 unique implementations to date and supporting more than 55,000 meetings each year, OnBoard’s Implementation and Customer Success teams have experienced – and helped customers overcome – nearly every challenge imaginable.

And with deep experience in multiple industries of board governance, including finance, health care, higher education, professional associations, nonprofit organizations, and private and public companies, your board can rest assured that OnBoard’s team has the answers you need.

Rated No. 1 by Users

OnBoard is proud to have achieved the highest rating in multiple categories on multiple software user review sites, including G2, Capterra, and others. [Read the reviews now.](#)



What is Included in the Implementation Process?

Every board's operational processes and goals are unique. That's why at OnBoard, the path to a better board meeting experience starts with asking the right questions. At the outset, our highly experienced Implementation team focuses on understanding your organization's unique characteristics and what defines success for your board.

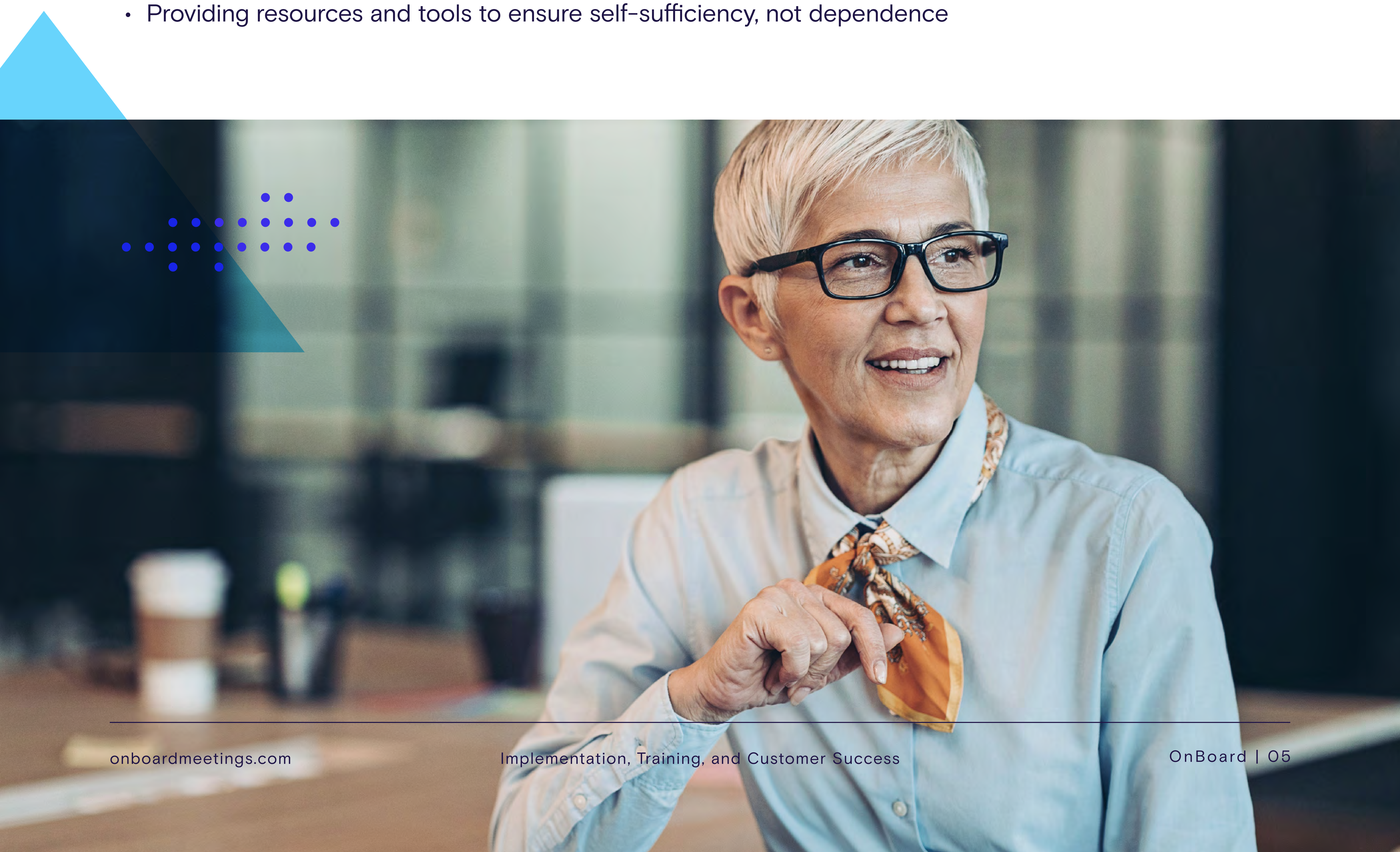
First, your Implementation Consultant will seek to understand what's important for your team by reviewing and confirming answers to the following questions during your first implementation meeting with OnBoard:

- What resources are available? What frameworks – such as regulatory compliance – must the board operate within?
- What are the board's overall objectives? Are there parallel initiatives underway within the organization?
- How comfortable are the board's users with new technology? How do they currently interact with existing software?

By seeking these answers before prescribing a plan, your Implementation team will be well-aligned and the implementation can progress at its own appropriate pace.

During the initial kickoff meeting, your Implementation Consultant will also focus on developing a mutual success plan that prioritizes your board's requirements. The success plan includes:

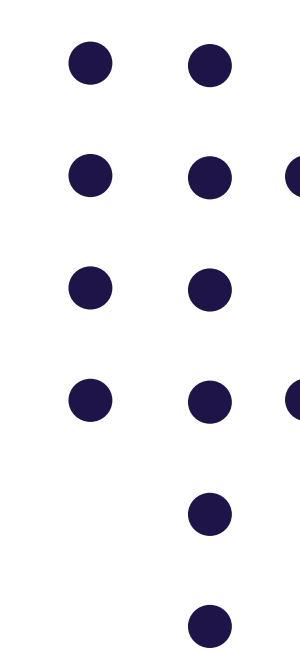
- Understanding how your organization introduces and manages change
- Identifying quick wins for your board's short-term goals and cadences to ensure long-term success and value
- Customizing a training plan to ensure full and satisfactory adoption among your board's members
- Providing resources and tools to ensure self-sufficiency, not dependence



How Long Does Implementation Take?

Most OnBoard customers complete implementation and are fully operational within the platform in six to eight weeks, including user training. However, because every board is unique and OnBoard’s ultimate goal is your board’s success, implementation timing can be reduced or lengthened as needed.





How Will You Train My Board?

“How will you train my board?” is one of the most frequently asked questions by customers. At OnBoard, the answer is easy: With a 100% focus on making your board’s directors, members, contributors, and administrators all comfortable, effective, and happy with the platform.

Every implementation includes a launch success program* that ensures every user – regardless of their affinity (or lack thereof) for new technology – is fully and successfully enabled. OnBoard user training covers not only first-time use and setup, but also regular refreshers, training webinars, and enablement for new features and capabilities as they launch.

Training programs range from self-directed digital-only experiences to fully immersive 1-on-1 sessions customized to meet the specific needs of your board and its directors.

Administrator Training

Whether they’re an executive assistant, chief of staff, or corporate secretary, the board administrator will typically spend more time within the platform than any other user. Administrator onboarding starts with the basics for moving existing board materials and resources into OnBoard, configuring user access and permissions, and organizing your first board meeting with OnBoard.

Director Training

The biggest concern many OnBoard customers face is, “How will I get my board to adopt a new board portal or technology?” Let's face it – not every director has an affinity for new technology. Some may even be downright resistant to any change to their preferred meeting preparation and execution processes.

That’s why OnBoard designed its director experience to be simple, intuitive, and easy to understand. Within the platform, nearly every action, document, or resource is just two clicks away and organized in a way that prioritizes the user’s needs.

Director training, whether in a 1-on-1, a group setting, or self-guided programming, focuses on demonstrating how board directors can quickly and efficiently find the meeting materials and resources they need to make their contributions to an upcoming board meeting successful.

And with a seamless experience across every device – whether online at app.onboardmeetings.com to the purpose-built app for Apple, Android, and Microsoft tablets and smartphones – OnBoard is easily accessible no matter what device your directors prefer.



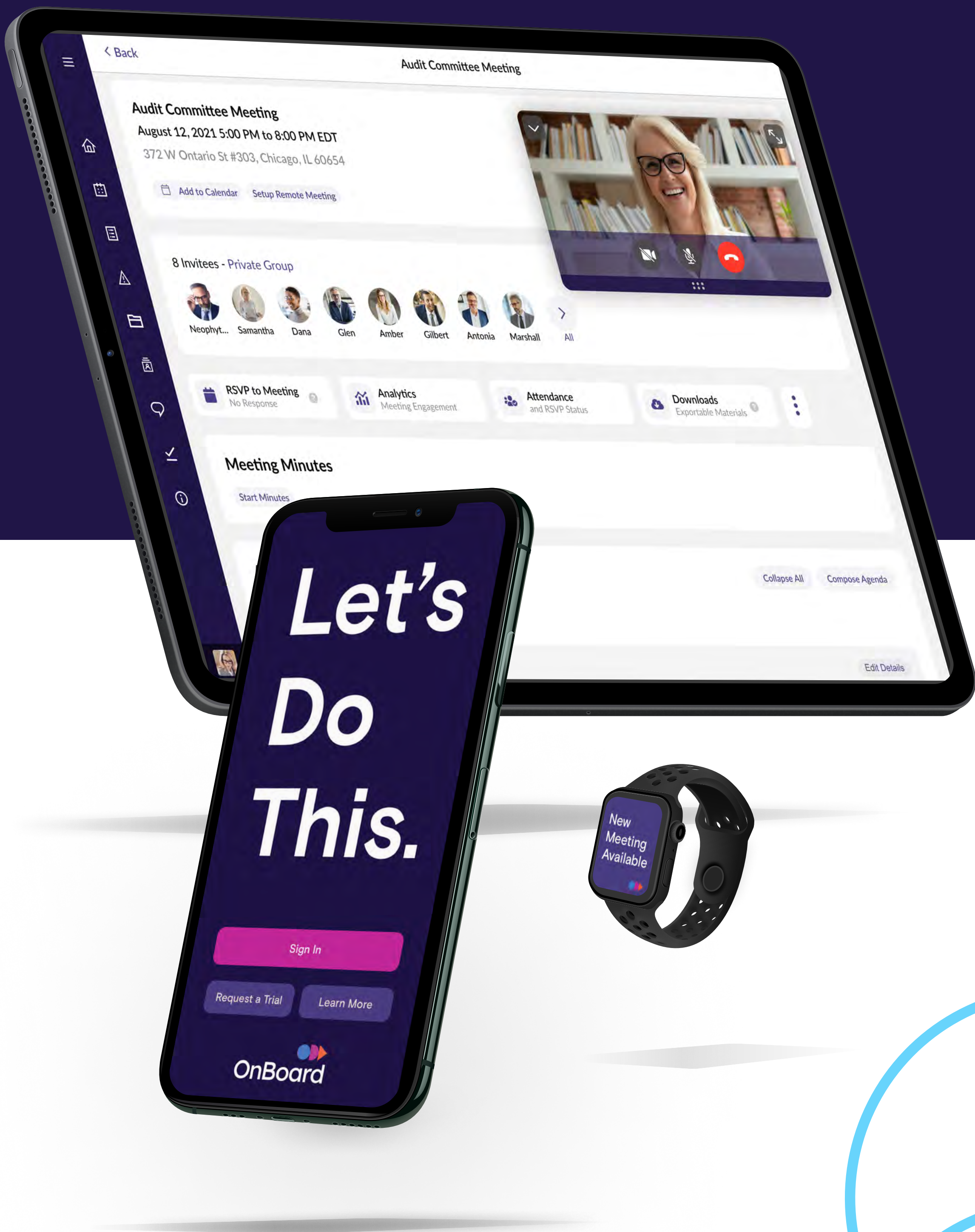
**Check with your account executive or review the pricing proposal to see the full range of professional services available in each OnBoard package.*

Executive Training

Board chairs, executives, and presidents, as well as other C-suite leadership, need no-nonsense access to the right information at the right time right away. OnBoard’s executive training program can be tailored to meet your C-suite leaders where they are, no matter their level of tech savvy.

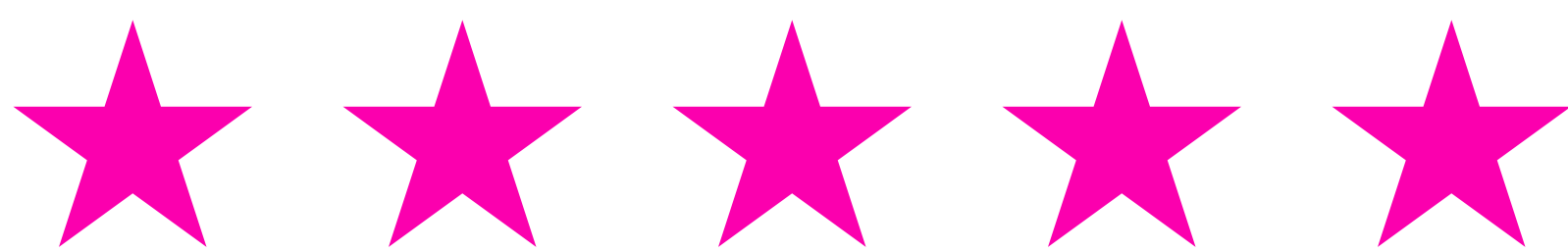
Self-Guided Training

All OnBoard training materials and resources are available in a self-guided format, with training, demonstrations, and enablement on specific capabilities accessible 24/7 in the OnBoard application and [Support Center](#).



Did you know?

OnBoard’s iOS app for iPhone and iPad is the highest-rated board management application available. OnBoard also offers seamless cross-device experiences for Android and Microsoft Surface devices.



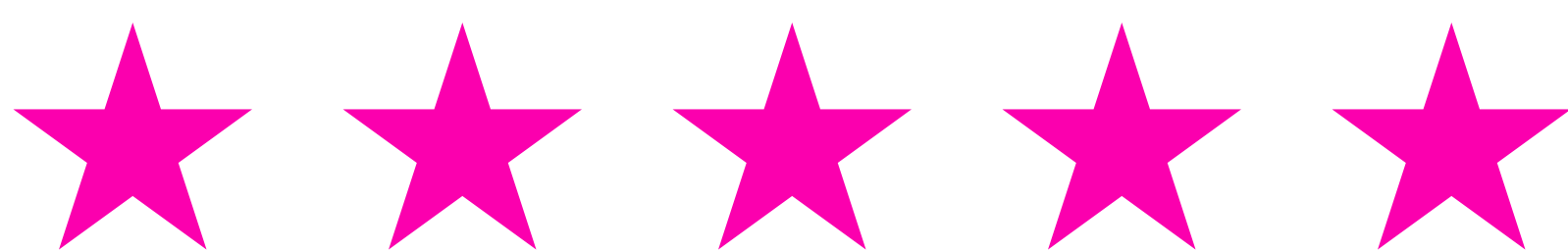
ndeboer

“Best board meeting tool I’ve ever had. Amazingly useful to keep all of my meeting materials right in my pocket.”



Heather47274

So easy to us
“I was leery of learning new technology, but this app is so incredibly easy to use. I wish our board would have switched to OnBoard sooner.”



Yay706

I would be lost without it
“All of my organizations, in one place. Easy access, whether I am on my phone, tablet, or laptop. Can’t imagine where I would be without it.”



Big Time Timmy Jim 5119
I love OnBoard
“Best board portal app I have ever used!”



What Other Professional Services Does OnBoard Offer?

OnBoard is thrilled for the opportunity to serve your board in the capacity its unique needs require. If and when needed, the following additional professional services* are available.

Board Material & Platform Migration

Seamlessly move your organization’s existing board records, archives, and data from its current archive or board portal into OnBoard.

Custom D&O Questionnaire Creation

Get professional support building directors and officers (D&O) questionnaires, including annually repeatable templates for future use.

Custom Board Assessment Creation

Create board assessments and templates for your board with the help of experienced board directors and chairs.

Supplemental 1:1 Training

Additional training for administrators, directors, and executives as needed, especially helpful for new chairs, directors, or committee chairs who are new to the board.

Skills Matrix Tracking Set-up

Get help from OnBoard’s team to document your board’s skills and identify gaps to inform recruiting.

Roles & Terms Configuration

Define roles and responsibilities for chairs and directors and establish custom term limits.

**Check with your account executive or review the pricing proposal to see the full range of professional services available in each OnBoard package.*





Customer Support & Help Line

With OnBoard, technical help is just a click or call away. If and when you need responsive technical support, Customer Support is available 24/7.

OnBoard's global Customer Support team can quickly respond to any issue, anytime and anywhere to ensure your board meeting goes off without a hitch.

By email:

help@onboardmeetings.com

By phone:

United States: 1-765-535-1880 Opt. 1

Canada: 1-437-291-7100

United Kingdom, Europe & Africa: +44 (0) 203 7691702

Australia, Asia, and Pacific: +61 (0) 2 8088 0761

Ready to simplify board meetings with the most highly rated and secure board management solution possible?

Schedule [a demo](#) of OnBoard's simple, secure, and user-focused platform today.