



Paperless Board Meetings

Checklist for Switching to Paperless Meetings

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Checklist for switching to paperless meetings

Minimise time and effort on board management and conduct effective paperless meetings with an easy-to-use, always-accessible, and highly secure board portal.

Create a transition strategy

To successfully guide the process of switching to paperless meetings, create a document with a description of the transition options, criteria for board management software evaluation and the approval process, and ensure everyone follows the same strategy.

Define requirements for software functionality

Board management solution providers offer a variety of tools, among which are agenda and minutes builders and templates, audio and video conferencing tools, deadline and task assignments, e-signatures, voting, and polls. Specify your board needs and choose a provider accordingly.

Prioritize security

Security is paramount when switching to paperless board meetings. That's why board software should have encryption capabilities, multi-factor authentication, role-based access controls, and other security features and protocols to protect confidential data.

Compare prices

Board management software prices differ from vendor to vendor and depend on a number of factors, including the functionality, professionalism and 24/7 availability of client support, and the volume of storage space. Go for the most cost-effective option.

 Test board portals

Take advantage of the free trials that vendors offer and get hands-on experience using board portals to define which option suits your needs most. Pay attention to such things as ease of use, collaboration tools, security measures, and customer support service.

 Consider training options

Some board portal solutions are less intuitive than others, so less tech-savvy users may experience difficulties when transitioning to paperless meetings. That's why it's important to find out what kind of training providers offer to board members and if client support is available 24/7.

 Choose a proven paperless meeting solution

Even though there are many board management software providers, just a few have proved to be really cost-effective. Thus, according to the users' feedback and the research conducted by board-room.org, the board portal by iDeals is the number one choice in terms of security, tools, price, and client support.

Top 5 reasons to use board portals for board paperless meetings

Make information accessible and improve board efficiency by adopting a top-notch board portal solution.

1. Reduced paper usage

By switching to paperless board meetings and reducing paper usage, companies not only decrease environmental impact, but also receive higher returns and increase profits.

2. Fast and secure data distribution

Board members can confidently exchange any type of board materials, including confidential data, due to advanced security features like multiple encryption and two-factor authentication.

3. Effective collaboration

Before, during, or after virtual board meetings, board directors have a number of tools at their disposal that make their work more effective. This includes chats, comments, annotations, agenda builder, etc.

4. 24/7 accessibility

A board portal is available on any device — anywhere and anytime. It allows board members to access and work on materials at any convenient time, stay updated on changes, and deliver better results.

5. Cost-effectiveness

Using board management software and conducting paperless meetings, organizations save on physical document storage, office supplies, and travel expenses. If you also want to find a cost-effective solution, have a look at the [board portal comparison chart](#) and consider the experts' top choice — iDeals Boards.

**Simplify and upgrade your board meetings with
iDeals Board**

[Learn More](#)

Get started today to experience the difference that board management software can make.

Want to learn more about iDeals Board or have a sales, support or billing request, follow the <https://www.idealsvdr.com/contacts/>



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