

**Last Updated:** 15 January 2025. **Author:** Max Lindsay. This document gives an overview of our onboarding process and what to expect when first becoming a customer with BoardCloud:

## Initial Consultation

After signing up for BoardCloud, our team schedules an initial consultation. This session aims to:

- Understand your organization's specific needs.
- Identify the key features and tools most relevant to your board's operations.
- Outline a tailored onboarding timeline.

## Account Setup

Our onboarding specialists assist with the setup of your BoardCloud account, which includes:

- Creating your organization's profile.
- Setting up user roles and permissions for board members, administrators, and other stakeholders.
- Importing your existing data (e.g., meeting agendas, minutes, and member details).

## Platform Customization

To ensure BoardCloud aligns perfectly with your workflows, we guide you through customization options, such as:

- Configuring meeting templates and schedules.
- Tailoring notification preferences.
- Setting up integrations with existing tools like Microsoft Teams, Zoom, or Google Workspace.

## Training and Support

Our comprehensive training program ensures your team is equipped to maximize BoardCloud's features:

- **Live Training Sessions:** Interactive sessions tailored for administrators, board members, and other users.
- **On-Demand Tutorials:** Access a library of step-by-step video guides and documentation.
- **Dedicated Support:** Your onboarding specialist remains available to address any questions or concerns.

## Trial Run

We conduct a trial run of your first board meeting using BoardCloud to:

- Familiarize users with the platform in a real-world setting.
- Test features such as agenda creation, document sharing, and voting.
- Identify any adjustments needed to improve usability.

*This document is intended for prospective and current customers seeking an overview of BoardCloud's security measures. For detailed technical documentation, please reach out to our support team.*

## Feedback and Optimization

Post-trial, we gather feedback to fine-tune your experience. This includes:

- Adjusting workflows based on user input.
- Providing additional training or resources as required.
- Ensuring all users are confident in utilizing the platform's capabilities.

## Ongoing Support

Onboarding doesn't end once you're up and running. Our team provides ongoing support through:

- **24/7 Customer Support:** Access to our expert support team via email, chat, or phone.
- **Knowledge Base:** A comprehensive resource hub with FAQs, troubleshooting guides, and tips.
- **Regular Updates:** Notifications about new features and enhancements to keep you informed and equipped.

## Contact Us

For more information about BoardCloud's security features, please contact us at [info@boardcloud.org](mailto:info@boardcloud.org) or visit our website at [www.boardcloud.us](http://www.boardcloud.us).

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