

Best Practices – During the meeting

BoardBook has a variety of tools designed to be used during the meeting. From taking the minutes, to assisting with meeting navigation and even recording the vote electronically, we have the tools and best practices for you.

In this document we will discuss general best practices. Some these practices may or may not apply to your specific organization.

Overview of Meeting Management Tools:

The ideal meeting is concise, well organized and free of interruptions. We have tools that can help with keeping our board members and public on track, making the minutes takers job easier, and even electronically recording votes.

Best Practices

Use the Lead and Follow options for your board and public

A user with the 'Meeting Leader' permission can lead the navigation of the meetings. Whether going from one item to the next or opening an attachment, users who are following are on track and on the same page. Another feature is the optional public 'Projector' that can be used to drive a projector or TV visible to your public. The public can follow along while providing you the comfort of knowing the projector only displays that information you have designated as public.

Electronic Voting

This feature is a great tool to help simplify a sometimes chaotic and confusing process like recording the vote. Whether questioning the order of the vote, or whether someone was heard correctly, this can slow down your meeting. With electronic voting the board members are presented with the motion and their voting options, they vote, then confirm their vote and you're done.

Taking the Minutes

We also have specific tools for recording the board members attendance, votes, and any other notes you need to record for your meeting. See more on this in our Minutes – Best Practices.

For more information about our meeting management tools please look at our viewer support page. This support page can be reached by clicking on the blue circle with the question mark (found at the top of the page) and selecting 'BoardBook Board Member and other Viewer Help'.