

TEMPLATE

The business case for *Boardmate*

A fill-in template for the person making the internal case. Capture the current workload, the cost of the status quo, and what changes with Boardmate – ready to put in front of a decision-maker.

The current workload

Start with the shape of the work today. Use the minutes cost calculator at boardmate.app/resources to estimate the figures.

Funds, entities, or committees we support

Each board whose minutes we produce

Meetings per entity each year

Annual, quarterly, and special, combined

Hours to produce one set of minutes

Drafting, chasing, redrafting, packaging

Blended hourly cost of that time

Across junior and senior team members

Estimated annual hours and cost on minutes today

From the calculator

Backlog of meetings currently waiting

Historic meetings still needing formal minutes

The cost of the status quo

Name what the current way actually costs, beyond hours.

Where time is lost today

Drafting, chasing reviewers, reconciling feedback, version control, packaging, filing

Quality and consistency risks

House-style drift, lost actions, no audit trail

Capacity constraint

What the team cannot take on because of the minutes load

What changes with Boardmate

Map the change to the outcomes a decision-maker cares about.

	WITH BOARDMATE	TODAY
Throughput	More minutes through the same experienced team.	Output capped by manual drafting and chasing.
Consistency	House style, defined terms, and output stay closer across the portfolio.	Varies by who drafts and how busy they are.
Control & risk	Chair-controlled review and a full audit trail per meeting.	Feedback by email; trail reconstructed after the fact.
The cycle	Lite clears the backlog; Full carries the live cycle.	Backlog and live work both run on Word and email.

The proposal

Set out the recommended first step and what it would prove.

Recommended first step

e.g. a representative Lite evaluation of 5-10 meetings

What the evaluation will demonstrate

Drafting quality, house style, reviewer control, output, audit clarity, time saved

Decision requested

What you are asking the decision-maker to approve

Keep the case grounded in evidence: the strongest version is built on a representative sample of your own meetings, not a projection.

Build the evidence for your case

Run a representative evaluation and use the results in this template. **Book a demonstration** at boardmate.app.