

BUYER'S GUIDE

Choosing a minutes & *board-cycle* platform

What to evaluate when board work is the bottleneck: the questions to ask, the difference that appears after the first paragraph, and how to run a comparison that reflects real work.

The difference appears after the first paragraph

A fluent paragraph is easy to demo. But board support still has to assemble source material, draft the formal structure, chase reviewers, interpret replies, redraft, export, file, and carry decisions forward. Evaluate the whole sequence, not the first sentence.

	WHAT TO LOOK FOR	WHY IT MATTERS
Source handling	Can it draft from transcripts, packs, notes, and prior minutes?	A paragraph from a paste is not a formal minute.
Review control	Do comments, uploads, and confirmations stay attached to the draft?	Otherwise feedback is reconciled by hand from email.
Decision point	Can the chair decide what changes before regeneration?	Without it the record drifts with every comment.
Output package	DOCX, PDF, actions, and audit trail together at approval?	The working file and the review trail must not separate.
Reviewer access	Scoped private links, or a paid seat per reviewer?	Directors should not need a portal account to comment.
Continuity	Does it carry into the live board cycle?	Backlog tools stop at text; the cycle keeps going.

Questions to ask in every demonstration

ON QUALITY

- ☐ Can it draft from **our** source material, in **our** house style?
- ☐ How does it handle a complex meeting, a short one, and an adjourned one?
- ☐ How is house style learned, and kept from flattening every fund into one template?

ON CONTROL & TRUST

- ☐ Who decides what feedback changes the record?
- ☐ What does the audit trail actually capture?
- ☐ What can a reviewer see, and how is access revoked?
- ☐ What security and data-handling detail can we review before files move?

Run a comparison that reflects real work

Set-up work should earn its place. The way to judge that is a representative sample, not a scripted demo.

- 01 **Pick a representative batch**
Five to ten meetings: ordinary, one complex, one short or adjourned, plus prior minutes that show house style.
- 02 **Agree confidentiality first**
Settle data handling and security review before real board material moves.
- 03 **Compare like for like**
Run the sample and compare drafting quality, reviewer experience, output usefulness, audit clarity, and time saved.
- 04 **Decide on evidence**
Judge the platform on the sample, not the pitch.

Boardmate's own answer to this guide: Lite for backlog clearance, Full for the continuing board cycle, with source handling, chair-controlled review, DOCX-first output, and an audit trail throughout.

Total cost of ownership, beyond the licence

The sticker price is rarely the real cost. Weigh these so the comparison reflects what the platform actually costs to run.

Reviewer licensing	Does every attendee or director need a paid seat, or do they review through scoped links? Seats multiply across a portfolio.
Implementation effort	How much set-up, configuration, and house-style work before the first useful output?
Time to first value	Can it clear real work in the first weeks, or only after a long rollout?
Switching cost	What does it take to move off the current Word-and-email process, and later off this platform if needed?
Ongoing admin	Who maintains templates, users, and access, and how much of their week does it take?

Common procurement traps

- ☐ **Demo on a perfect input.** Insist on your own messy, real source material.
- ☐ **Seats that scale badly.** Per-reviewer pricing balloons across many funds.
- ☐ **Generic board portal.** Storage and packs, but no real minutes workflow.
- ☐ **No audit trail.** No way to show how the record was reached.
- ☐ **Lock-in by format.** Outputs you cannot take with you.
- ☐ **Security as an afterthought.** No detail to give your risk team early.

Put Boardmate through this guide

Bring a representative sample and use it as your evaluation. **Book a demonstration** at boardmate.app.