

EVALUATION GUIDE

How to run a *Boardmate* evaluation

A representative evaluation can be small enough to govern and real enough to matter. This guide covers what to prepare, how to run it, and how to judge the result.

Scope the sample

Five to ten meetings is usually enough to judge quality, house style, reviewer control, and time saved – without exposing a broad archive at the start.

Ordinary meetings

The baseline for recurring language, approvals, and routine actions.

One complex meeting

A fuller agenda with service provider reports and more judgement calls.

One short or adjourned

An edge case that tests whether the draft stays proportionate.

Prior approved minutes

Approved wording that shows house style before generation begins.

Agree confidentiality and data-handling terms before any real board material is loaded. Security review comes first, sample second.

Run the evaluation

The workflow mirrors real production, end to end.

- 01 **Agree confidentiality**
Settle data handling and security review before sample material is loaded.
- 02 **Prepare the batch**
A CSV manifest plus the source folder: transcripts, packs, prior minutes, notes, reports.
- 03 **Import & preflight**
Walk through matching together and resolve missing, ambiguous, or recoverable material.
- 04 **Draft, review, regenerate**
Generate drafts, gather reviewer comments, and use chair decisions to shape the next version.
- 05 **Export the package**
DOCX, PDF, actions, and the audit record for each meeting.

Judge the result

Compare Boardmate's output against the current workflow on the things that matter.

	JUDGE ON	WHAT TO LOOK FOR
House style	Does the draft read like your approved record?	
Reviewer control	Do comments stay attached and chair decisions hold?	
Output usefulness	Is the DOCX a practical working file?	
Audit clarity	Can you show how the record was reached?	
Time saved	How does effort compare with the current route?	

Plan your evaluation

We will help you scope a representative sample and agree the review criteria. [Book a demonstration](#) at boardmate.app.