

PRODUCT BROCHURE

Boardmate *Lite*

Clear minutes backlogs without losing house style. Upload the meeting list and source material; Boardmate drafts formal minutes, coordinates review, and keeps the record ready for approval.

What Lite is for

Lite is deliberately narrow: it helps a board support team turn historical meetings into reviewed, approved minutes without managing Word versions by email. It is Boardmate stripped to the workflow that clears a backlog.

1 folder

A manifest plus the source you already hold

DOCX-first

The working file board support actually needs

Full audit

Every step recorded against the meeting

The workflow, end to end

- 01 Import & preflight**
Bulk-import meetings from a CSV manifest, upload a source folder, and see what matched, what is missing, ambiguous, or recoverable before drafting.
- 02 Draft in house style**
Formal minutes are generated from the transcript or recording, board pack, prior minutes, and support notes – in the organisation's own structure and language.
- 03 Coordinate review**
Private reviewer links gather comments, uploads, and no-comment confirmations, attached to the passage they concern.
- 04 Chair-controlled regeneration**
The chair or delegate accepts, holds, or rejects feedback; the next version is produced from accepted material only.
- 05 Approve & export**
Export DOCX, PDF, extracted actions, and the audit record together as one approval package.

What you give it, what you get back

Inputs

- CSV manifest, one row per meeting
- Recordings or transcripts in the formats you hold
- Board packs, previous minutes, support notes, separate reports
- Reviewer names: chairs, attendees, service providers

Outputs

- Formal house-style draft minutes
- Private reviewer links with passage-level comments
- DOCX working file, PDF reading copy, extracted actions
- An audit record of access, decisions, and exports

Why board support teams choose Lite

	BOARDMATE LITE	THE USUAL ROUTE
First draft	Meeting material becomes formal minutes fast enough to review while context is fresh.	Type, copy, and rebuild structure meeting by meeting.
Review round	Comments, uploads, and no-comment confirmations stay attached to the draft.	Feedback scattered across email threads, markups, and silence.
Control	The chair decides what changes; regeneration uses accepted feedback only.	Whoever edits the file decides, by hand.
The record	DOCX, PDF, actions, and audit travel together at approval.	Final minutes and the review trail drift apart.

Lite is not “less Boardmate” in quality. It is Boardmate focused on the job that clears a backlog – and the same controlled record can later carry into the live board cycle in Boardmate Full.

See Lite on your own backlog

Bring five to ten representative meetings and we will show the workflow end to end. **Book a demonstration** at boardmate.app.