



# Board Tech

## *Implementation Guide*



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# Introduction

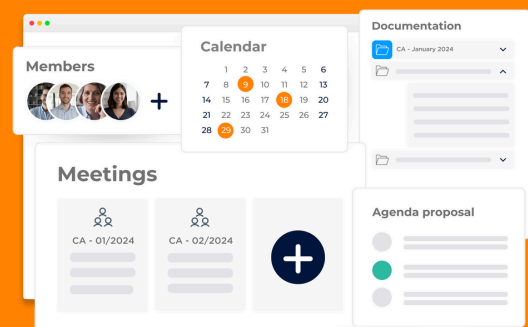
The rapid shift toward **digital work environments** has left many legal teams facing a common dilemma: **How to manage increasingly complex workflows, collaboration, and compliance demands without adding friction to daily operations?** While Legal Tech adoption is often seen as inevitable, implementation remains a significant hurdle and understandably so. Between change management, user adoption, and data security concerns, it's no surprise that many teams approach new tools with hesitation. **But, as outlined in this guide, there are ways to simplify implementation to unlock the benefits of automation for quicker returns on investment and to ensure successful adoption and integration with your existing processes and technology stack.** And when legal tech is done right, as is the case with Board Management tools, automation can ease governance burdens instead of adding them.

**Finding and leveraging the right solutions has become a strategic priority for legal professionals focused on enhancing governance, security, and collaboration.** General secretaries, board members, and administrative teams increasingly require Board Management tools to manage critical board activities with accuracy, speed and transparency. Selecting the right software is a major milestone; however, successful adoption depends equally on a well-planned, structured implementation.



In this guide we will show you the most common steps of a **Board Management tool implementation** and prove it can be easier than you think.

By the end, you will have guidance to anticipate challenges and deliver the best long-term organizational value with your chosen solution.



# Driving Digital Efficiency in Legal Governance

## The Role of Board Management Tools in Modern Board Operations



In recent years it has become hard to think about board management without digitalization. Companies are more global than ever and have strict requirements in terms of offline/online availability, remote meeting management, easy collaboration and document sharing, just to name a few criteria.

**Opting for a board portal isn't just about improving efficiency.**

DiliTrust's [recent survey with Above the Law](#) revealed that the lack of a proper legal tech tool stack negatively impacts team energy and motivation.

### STEP 1

## Setting Goals, Building the Foundation

### OVERVIEW

**Effective board portal implementation starts not with the software itself, but with the structure behind it.** Before configuring features or workflows, organizations must **align cross-functional stakeholders**, define clear responsibilities, and map technology use to real governance needs. Legal, IT, and board stakeholders each offer critical insights but **without coordination, implementations often stall.**

Three foundational pillars drive success during this phase:

- **Role clarity:** Assigning responsibilities across general secretaries, IT teams, and board members **prevents confusion and accelerates progress.**
- **Realistic use cases:** Governance tools must address **real operational needs**, like meeting management, admin efficiency, and cross-border compliance, rather than idealized functions.
- **Strategic collaboration:** A strong **feedback loop between technical and non-technical teams** ensures alignment on security, usability, and adoption from day one.

Early investment in goal setting and stakeholder alignment dramatically reduces friction during rollout and **improves long-term return on investment**. Getting the foundation right is not just preparatory; it's transformative.

This section explores how to establish that foundation: **by clearly defining each stakeholder's role and identifying the most relevant, high-impact use cases**. When governance platforms are built around the actual workflows they're meant to support, organizations set the stage for smoother implementation and stronger adoption.

### DEFINING ROLES AND RESPONSIBILITIES

Successful implementation requires collaboration across legal, administrative, IT, and executive teams. Clearly **defining and communicating roles** at the start will minimize confusion and promote accountability. Clear role division also speeds up implementation. **We can separate the most crucial roles into two categories, General Secretaries and Board Members**.



## THE GENERAL SECRETARY

The **general secretary** is central to the success of the board portal implementation. Typically, this key stakeholder initiates the process, from requesting the tool to defining the selection criteria (in collaboration with board members) and overseeing the deployment. **Think of them as project leaders within the organization.** They're responsible for coordinating many aspects of the implementation.



### Focus Area

## Description



#### ROLE & RESPONSIBILITIES

- Project leader for board portal implementation
- Sets governance and operational objectives
- Coordinates internal/external stakeholders
- Embeds compliance and security standards from the start



#### DAILY CHALLENGES

- Balancing volume of tasks with limited team size
- Lack of clear ownership across departments
- Managing deadlines without defined workflows



#### COLLABORATION NEEDS

- Acts as a bridge between legal, IT, and executive teams
- Needs active input from board members for agenda and content planning
- Relies on support from IT for integration



#### TOOL USAGE & IMPACT

- Leverages board portal to streamline meeting preparation
- Uses platform to assign tasks, distribute agendas, and ensure compliance
- Digitizes workflows to reduce bottlenecks



#### KEY GOVERNANCE USE CASES

- Meeting Management: Agenda setting, scheduling, document preparation
- Administrative Management: Resolution tracking, signature workflows
- Global Governance: Overseeing multi-jurisdictional compliance from HQ

## BOARD MEMBERS

Board members are the end users and essential contributors to platform design and usability. They are, of course, key players in defining crucial criteria, such as collaborative needs. Their role starts at the beginning when general secretaries compile their needs but becomes more instrumental after rollout.



### Focus Area

## Description



#### ROLE & RESPONSIBILITIES

- Define collaboration and usability needs
- Participate in pilot tests and feedback cycles
- Engage in trainings to ensure proper platform use



#### DAILY CHALLENGES

- Navigating usability issues across devices
- Ensuring timely access to documents and decisions
- Lack of integration across board processes in early stages



#### COLLABORATION NEEDS

- Need streamlined communication from general secretaries
- Depend on intuitive workflows and centralized access to materials
- Require multilingual and cross-device capabilities



#### TOOL USAGE & IMPACT

- Use the portal to review documents, vote securely, and access materials remotely
- Participate more fully when usability and trust are high



#### KEY GOVERNANCE USE CASES

- Meeting Management: Reviewing agendas and documents, annotating content
- Administrative Management: Participating in voting and approval workflows
- Global Governance: Engaging in multilingual meetings and accessing materials from multiple jurisdictions

Once each user group has defined their role and responsibilities, the implementation planning can move forward. The second phase focuses on the must-haves before jumping on to the technical aspects of the project.

## STEP 2

# Preparing Your Project and Requirements

There are generally three methodologies or approaches to software implementation, for the board management solution we'll focus on two of them:

1. An immediate rollout
2. A phased implementation

Each carries trade-offs in speed, risk, and resource intensity and the **right approach depends on an organization's needs and resourcing limitations**. Organizations also have to account for change resistance, underestimated technical complexity, and misaligned expectations. **Choosing the right strategy** and planning requirements up front **mitigates these pitfalls**.

Key takeaways:

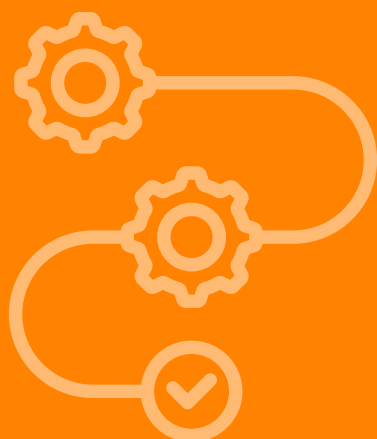
- **Match your timeline** to change readiness, not urgency alone.
- **Build cross-functional** alignment and assign clear ownership.
- **Select an implementation approach** that balances agility with sustainability.



## SO WHICH APPROACH TO SOFTWARE IMPLEMENTATION IS BEST FOR YOU?

Implementation success starts long before training begins. **It begins with planning that aligns governance goals, internal capabilities, and technical readiness.**

Factors like team familiarity with board software and internal resourcing will impact timelines. And timelines are the starting point for considering approach.



Is your goal to minimize disruption and implement the board portal in a relatively short or quick time? **Then set realistic and feasible expectations regarding your timeline.**

Timelines depend on company size, vendor support, internal bandwidth, and most critically, change readiness. Even the best tool fails without user adoption.

**Once your target timeline is clear, select the implementation model that fits.**

# Implementation model



## IMMEDIATE IMPLEMENTATION

An accelerated rollout may be appropriate when the **organization faces urgent operational or compliance pressures**. This model is often selected when:

- An upcoming high-stakes board meeting demands a **rapid logistics upgrade**
- **Existing governance processes are risky** and need urgent resolution.
- **Executive leadership drives rapid digital transformation initiatives.**

Generally, organizations opting for an immediate implementation aim to deploy the portal within a few weeks, or even days. **The key focus is to enable core features as soon as possible for immediate operations.** This approach demands intensive coordination across stakeholders, and a sharply defined scope for initial go-live activities.

Additional key considerations for this approach include:

- **Resource Allocation:** Assign dedicated staff to manage the transition, including a project owner.
- **Vendor Responsiveness:** Work with a provider that offers rapid deployment capabilities.
- **Change Management:** Communicate clearly with board members and executive users about the rationale for the accelerated timeline, emphasizing the benefits.

While this approach demands a higher level of short-term effort, it offers immediate returns, especially in environments where governance agility is critical. **However, this model carries high risk: compressed timelines can lead to poor adoption, overlooked requirements, and technical oversights.**

## → PHASED ROLLOUT

On the other hand, the opposite approach is that some companies opt for a phased rollout. **As the name suggests, a phased implementation takes place in stages.** It's ideal when:

- Teams prefer going at a slower pace.
- Teams prefer emphasizing the training and change management of future users.
- There are no pressing needs in terms of risky governance or security processes.

Additional key considerations for this approach include:

- **Company size and structure:** This approach is well-suited for large or decentralized organizations, such as those managing multiple boards or committees.
- **Pilot strategy:** Ideal for teams that want to test the platform with one board before rolling it out organization wide.
- **Internal bandwidth:** Beneficial for companies that need more time and flexibility onboarding, handling training, and change management phases.



### Phased stages

- **Pilot Phase:** A subgroup tests the platform.
- **Expansion Phase:** Materials are optimized; user waves are onboarded gradually.
- **Full Rollout:** Broad deployment with peer support (by project champions) and feedback integration.

This approach **reduces resistance and builds confidence among users**, especially in more conservative legal and governance cultures. **It also allows project leads to gather feedback at each stage and adapt to the rollout, accordingly**, reducing the risk of implementation fatigue or operational disruption.

# The Ultimate Pre-implementation Checklist



## User Management:

- Number of active users
- Access levels and permissions
- Integration with existing user directories



## Meeting Structures:

- Number of boards and committees
- Frequency of meetings
- Types of meetings (e.g., in-person, virtual, hybrid)



## Security and Compliance:

- Two-Factor Authentication (2FA) requirements
- Single Sign-On (SSO) integration
- Data retention policies



## Data Migration:

- Identification of legacy data to be imported
- Formats and structures of existing documents
- Potential data cleansing needs

## Anticipating Challenges

- Resistance to change among board members
- Technical incompatibilities with existing systems
- Data migration complexities
- Security configuration gaps
- Over-customization too early on
- Underestimated resource needs

## STEP 3

## Empowering Users





For a **successful board management solution adoption**, in-depth admin training for general secretaries and simplified usability-**focused training** for board members is necessary. Each track supports distinct user needs, influencing adoption speed and governance outcomes. Organizations must plan key risks user resistance, feature underuse, and disengagement, by **prioritizing a tailored training strategy early in implementation**.

Key takeaways:

- **Train by role, not one-size-fits-all.** Align training to each group's responsibilities and time constraints.
- **Enable admins to lead.** Equip general secretaries with deep platform knowledge to drive adoption and governance value.
- **Simplify for board members.** Focus on intuitive access, cross-device usability, and collaboration to ensure executive engagement.




### GENERAL SECRETARIES TRAINING

General secretaries (and other legal support roles) act as principal admins of the board portal. As admins, they'll require in-depth training in the tool. **They must understand all the features and more importantly, grasp their full potential** to elevate their use.

Phase	Description	Expected outcomes
 <b>TOOL FAMILIARIZATION</b>	In-depth training on portal structure and general admin responsibilities	Confident use of platform navigation; understanding of core functionality
 <b>MEETING &amp; AGENDA MANAGEMENT</b>	Learn to automate and streamline recurring board activities	Efficient setup of meetings and agendas; use of templates and document linking
 <b>PERMISSION CONTROL &amp; SECURITY</b>	Training in confidentiality management and access customization	Role-based permission settings; security protocol awareness
 <b>ADVANCED GOVERNANCE TOOLS</b>	Training on analytics, reporting, and minute generation features	Insightful data use- Support for audit readiness; improvement tracking

## BOARD MEMBER TRAINING FOCUSING ON USABILITY AND ENGAGEMENT

Board members **often have limited time** to learn about new systems. However, their **consistent use of the board management solution is essential** to achieving the intended benefits of governance efficiency and security.

Phase	Description	Expected outcomes
 <b>USABILITY &amp; ACCESSIBILITY</b>	Train on accessing, reviewing, and interacting with board materials	Confident use of board books and annotations; seamless access on all devices
 <b>COLLABORATIVE GOVERNANCE</b>	Teach collaboration tools such as voting, commenting, and digital discussions	Efficient remote decision-making; familiarity with interactive board workflows
 <b>POST-ROLLOUT SUPPORT</b>	Provide ongoing assistance and feedback channels post-implementation	Higher sustained engagement; faster resolution of questions or blockers



## STEP 4

### Use the Tool: Launch, Learn, Adapt

Here we'll explore the **final phase** of a board solution implementation: going live, learning from real-world use, and continuously optimizing. It emphasizes habit-building over one-time deployment, with a soft launch as a strategic starting point. **Piloting with a smaller committee allows teams to validate workflows, uncover friction points, and adjust before broader rollout.**

Ongoing feedback collection, user support, and success metric tracking are critical. Assign clear ownership to monitor adoption, relay feedback, and drive improvements. **A commitment to iteration via stakeholder reviews and gradual feature expansion ensures long-term success.**

Key takeaways

- **Start small to learn fast.** Use a pilot phase to validate workflows and uncover early issues.
- **Track adoption with clear metrics.** Logins, time savings, and digital engagement signal success.
- **Make iteration a habit.** Adjust processes, permissions, and templates regularly to stay aligned with user needs.

#### START WITH A SOFT LAUNCH

Instead of throwing your entire governance operation into the deep end, **consider a pilot phase.** Select one committee or a smaller board, like the audit or ESG committee, to **trial the board portal before full-scale rollout.**

A soft launch lets you:

- Validate your meeting **templates**
- Test real-world **use of agenda creation**, document collaboration, and digital voting
- **Identify user confusion** and friction points before they scale

For example, if during your pilot you find that some board members struggle with accessing offline materials on their tablets, this is the time to **address that with additional onboarding resources or configuration tweaks.**

## GATHER FEEDBACK ACTIVELY

Real-time user feedback during the first few meetings is gold.

Capture it through:

- Post-meeting **surveys**
- A **feedback form** built into the Board Management tool
- Quick **check-in calls** with key users

**Assign someone**, often the general secretary or a project lead, **to triage this input and communicate it back** to your software provider if product-related, or internally if it's a training or setup issue.

## MONITOR SUCCESS METRICS

**Set up simple KPIs** to track how the tool is being used, such as:

- Percentage of board members who log in and access materials
- Time saved in agenda preparation and document distribution
- Completion rate of digital signatures and voting participation

For example, if it previously took the legal team 40 hours to prepare a meeting packet manually, using the board management solution could reduce that significantly. **Time savings and reduced error rates should be reported early to reinforce internal buy-in.**



“90  
hours

*saved on manual  
tasks and signatures  
post-board meeting*

# CONCLUSION

## Board Management: A Strategic Transformation for Future-Ready Governance

A successful **board management implementation** is not just a **technical deployment**, it's a strategic transformation.

As this guide illustrates, it starts with laying a **strong foundation**: aligning stakeholders, defining clear roles, and identifying practical governance use cases.

When general secretaries act as project leads and board members are engaged early, adoption becomes **smoother** and more **meaningful**.

Board management tools, when implemented with care and clarity, empower **legal professionals to lead with greater transparency, agility, and impact** – today and into the future.



# Bonus Strategy

## Risk Matrix: What Could Go Wrong and How to Prevent It

Risk	Probability	Impact	Mitigation Strategy
Resistance from board members	Medium	High	Pre-launch demos, involve early champions, focus on benefits to them
IT integration issues	Medium	Medium	Involve IT early, conduct compatibility testing
Missed training or poor adoption	High	High	Use multi-format training: live, video, PDF; follow-up sessions
Security misconfigurations	Low	High	Audit settings with IT and vendor before go-live
Incomplete data migration	Medium	Medium	Prioritize what needs migrating; stagger historical data upload
Feedback not acted upon	High	Medium	Assign owner for post-launch feedback and iteration plan
Over-reliance on 1 admin	High	High	Cross-train multiple team members; avoid single point of failure

# Tips to Lead Your First Board Meeting Successfully

Whether it's a full board session or a lighter agenda committee meeting, the first official use of your board management tool should feel smooth and well-prepared. Here's how to nail it:

## 1 Do a guided walkthrough at the start of the session

Let the general secretary or a power user walk attendees through the agenda layout, document access, and where to leave comments.

## 2 Run a “sandbox” meeting in advance

Hold a low-stakes test meeting—perhaps for a monthly executive check-in—with a simple agenda to help participants get used to the system.

## 3 Prepare a one-pager cheat sheet

Include login steps, contact for technical support, and common troubleshooting tips

## 4 Have a support line on standby

Coordinate with your portal provider to ensure a Customer Success rep is available during the live meeting to resolve any access issues instantly.

## 5 Record the meeting

Use the video recording (if allowed) as a future onboarding asset for new members

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from you!**

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DiliTrust is a global provider of AI-powered SaaS solutions dedicated to empowering in-house legal teams by giving back valuable time and peace of mind.

Leveraging its proprietary AI, DiliTrust secures and streamlines legal operations, allowing teams to focus on strategic decision-making and maximize their impact within the organization.

The DiliTrust Governance suite enables legal departments to efficiently manage the entire contract lifecycle, centralize entity management, secure board meetings, and maintain control over matter management. Supporting more than 2,500 businesses across over 60 countries, DiliTrust has a presence in key locations, including Canada, Dubai, France, Germany, Italy, Mexico, Spain and the United States.

Committed to fostering simplicity, innovation and security, DiliTrust helps legal departments work smarter while enhancing operational efficiency and minimizing risk. Discover more at [www.dilitrust.com](https://www.dilitrust.com).