

# The Paperless Boardroom is Here – No More Excuses

## Whitepaper

**By combining the immediacy of online access and readability of print, iPad delivers an experience better than paper. Learn how BoardVantage makes board meetings and processes paperless, brings unprecedented efficiency, and addresses security.**

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A year and a half after its introduction, the iPad has made the paperless boardroom a reality. Not that technology is a stranger in the boardroom—it's been there for years. It's just that in the 'pre-iPad' days, director use was light, mostly from home and for a quick check of material prior to the meeting. In-meeting use was virtually non-existent, primarily from a handful of tech-savvy directors, whereas more traditional directors stuck with paper. This created the undesirable side effect of cleaving the boardroom between progressive and traditional directors, less than ideal for a setting that prides itself on collegiality. This 'pre-iPad', browser-based, world was successful in delivering electronic copies of the boardbook for the convenience of a handful of techie directors, but the long-anticipated paperless boardroom never materialized.

Now suddenly, and without much fanfare, the iPad has changed the game. Overnight, boards of all stripes are going paperless, and not without reason. First, the app opens up a wider range of access to content. It's no longer just about the current meeting; you also have a bird's eye view of all previous meetings, all in animation that presents dense board information with unprecedented efficiency.

Second, by combining the immediacy of online access with the readability of print, the app delivers an experience that doesn't just have parity with paper, it delivers an experience that is better than paper. Finally, as a device, the iPad is so straightforward that it can serve as a common platform for the whole board. So, unlike its browser predecessor, it produces an inclusive experience for all directors—progressive and traditional alike. If you are contemplating making the switch to the iPad and going paperless, it's important to understand the new set of use cases that comes with it. That is because the new 'post-iPad' world is materially different from the old 'pre-iPad' world. For one thing, it's more mobile, and that mobility introduces a set of new use cases with their attendant risks. First let's talk about mobility.

Laptops may have been the accepted standard of mobile computing inside the enterprise for ten years or more, but not so in the boardroom. Although laptops were present they were not mobile.

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Often companies procured them for their directors but held them for meeting use. Before the meeting they'd pull them off the shelf, boot them up and roll them into the boardroom. After the meeting they were promptly returned to their lockers. Typically only a fraction of directors would actively use them in the meeting.

With the advent of the iPad, things could not be more different. Directors now own their iPads. They may have purchased them with their own money or the company may have gifted them. In either case, unlike the old-school laptops, directors now carry their iPads wherever they go, and they rely on them for board materials, whether in-meetings or in-between. Not unreasonably, they expect ready access to those materials even if they're out of Wi-Fi range. This is a common scenario when board members are prepping for a meeting while in transit, perhaps reviewing material or making annotations in-flight on the way to a meeting.

***So in this brave new 'post-iPad' world, a challenging but essential requirement has sprung up: Seamless Offline Synced Access to all board materials.***

At BoardVantage we address this need with the Briefcase. The Briefcase syncs with our backend servers so that any annotations made while offline are immediately available when a director is back online, and those same notes are carried forward on the latest version of the boardbook, even if that book was updated while the director was offline. Also, to make sure that directors always have the latest information at their fingertips, sync technology lets the corporate secretary push new materials directly to the director's Briefcase. All of this is accomplished in a seamless manner to make for a hassle-free director experience.

But along with these advantages, the iPad has also created new security risks, particularly discoverability. That's why any board content downloaded by directors to the Briefcase still remains under the central control of the administrator. That means that documents and annotations can be purged remotely by the administrator, or expiration of notes can be automated to take place after a predetermined time.

The Briefcase is encrypted and password-protected to safeguard its content in the event that the device is lost or stolen. If necessary, content from a lost iPad can then be centrally purged by the administrator.

***At BoardVantage we believe that going paperless, without incurring a security risk and burdening directors with onerous process, dictates innovative Briefcase technology to bridge the gap between online and offline.***

We do this by extending board portal security on the device. Without this technology, companies run the risk of directors defaulting to consumer readers and annotation tools which invariably download content to their iPad, subjecting the company to a range of risks from security breaches to discoverability of notes.

I have summarized the basic attributes and benefits of our Syncing Briefcase in a listing of typical use cases, as well as how the technology addresses those challenges in the table below.

The shift from browser to iPad is significant because that new platform triggered an even greater shift—the transition from paper to paperless, a true milestone indeed. Although this is a momentous change for the boardroom it also true that many areas of the enterprise made a similar paperless move years ago, so in that broader context it has to be seen as a modest move forward. With this in mind, it's best to look at the entry of the iPad in the boardroom not as an end, but as a single step in a technology journey that is only now beginning. More on where this is likely to take us in an upcoming article.

Briefcase Attribute	Description	Use Case
Offline Repository	Access when no Wi-Fi or 3G is available	Directors prep while traveling to meeting
Encrypted and password protected	Extend portal security on the iPad	Materials stay secure while in offline mode
Push	Admin ability to push content to director Briefcase	Directors stay current on last-minute changes such as updating of the existing boardbook and recently added items of interest
Delete	Admin ability to exercise control over all content in the directors' Briefcase	Admin ability to exercise control over all content in the directors' Briefcase
Purge	Admin ability to clear out the directors' Briefcase instantly or use timed expiration	Remote wipe in case of loss of or theft of the iPad
Auto-Sync	Seamless integration between Briefcase and backend server using visual cues and progress bars	Automatic syncing to the latest version of the boardbook creates a hassle-free and transparent director experience