



Product Overview

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Board Management For Visionary Leaders, Powered by Artificial Intelligence

OnBoard brings powerful, secure artificial intelligence directly into your board—simplifying agenda building, capturing meeting minutes, surfacing strategic insights, and empowering leaders to make better decisions faster.

Setting a New Standard for Board Management

OnBoard is built for the real challenges boards face: limited time, complex demands, and rising oversight. With smart workflows and built-in intelligence, it streamlines logistics so boards can focus on what matters most—driving impact.

Invested in Your Success

Every board deserves intuitive technology and dedicated support. OnBoard pairs award-winning service with ongoing innovation to give your board the tools and guidance it needs from day one.



INTRODUCING

OnBoard's AI Vision

Purpose-Built for Real-World Governance

OnBoard AI is designed for the unique demands of board governance — where confidentiality, clarity, and accountability are mission-critical.

Built with real-world oversight in mind, OnBoard AI is developing new capabilities that deliver intelligence to support integrity and decision-making at every level.



Enhancing Core Governance Principles with AI

OnBoard AI amplifies how boards meet, plan, and govern—bringing intelligence to everyone and unlocking new levels of clarity, confidence, and control.

Better Planning

Better Meetings

Better Governance

Better Outcomes

10x Your Board's Impact

OnBoard AI delivers 10x performance across the boardroom — empowering administrators, general counsels, and directors to operate with unmatched speed, insight, and clarity.

Smarter Governance Starts Here.

Six AI Capabilities. One Seamless Experience.

From setting the agenda to tracking follow-ups, OnBoard AI delivers intelligent, secure support across the entire board life cycle.

Each feature is purpose-built to eliminate friction, surface what matters, and address the real-world challenges board leaders face every day. Help your board lead with clarity and decide with confidence—using AI designed specifically for governance.



Agenda AI

Effortless agendas, balanced and focused.

✦ Generate Agenda

Book AI

Surface related documents and information for better context and prep.

✦ Find Related Material

Minutes AI

Securely capture and draft accurate meeting minutes in real time.

✦ Generate Minutes



Assist AI

Ask & answer conversational AI.

Summarize

Key Insights

Risks

Actions AI

Flag incomplete items, identify follow-up needs, and bring continuity to decisions.

✦ Flag Item

Insights AI

Analyze agenda alignment, talk time, and engagement to measure what matters.

✦ Analyze & Share

Private by Design. Secure by Default.

Like the rest of the platform, OnBoard AI is built on Microsoft Azure’s enterprise-grade security and purpose-built for real-world governance compliance. Privacy is enabled by default, with granular control over users, content, and data retention.

The platform operates in a **closed-loop system**: No prompts or data ever leave your board’s unique instance, and nothing is used to train external models.

OnBoard AI meets HIPAA and GDPR standards and undergoes regular independent audits to comply with ISO-27001, ISO-27701, and SOC 2 Type II.



ISO-27001, ISO-27701
& SOC 2 Type II Audited



HIPAA & GDPR
Compliant



Closed-loop AI
with no model training



Granular user controls,
permissions & data retention



Privacy by default
principles



Microsoft Azure
encryption



Key Capabilities

OnBoard supports every stage of the board meeting cycle, from preparation and planning to execution and follow-through. It creates continuity between meetings and strengthens communication, helping directors, executives, and administrators work more effectively together, because good governance is a team effort.

Dashboard

Centralize your board's priorities – meetings, actions, and materials – in one intuitive view. Stay organized, track what's next, and access everything you need to lead effectively.

Agenda Builder

Create and share structured agendas with drag-and-drop ease, attaching documents, assigning presenters, and setting timing to keep every meeting organized, efficient, and aligned from planning through execution.

Minutes Builder

Create minutes directly within the platform by capturing notes, tasks, attendance, and motions as meetings unfold; keeping you focused in the moment and making post-meeting follow-up faster and easier.

Zoom & Teams Integration

With Zoom and Teams integrations, directors can connect face-to-face while using OnBoard on the same screen as their meetings and notes.

Click headlines to learn more.

Microsoft 365 Integration

Collaborate in real time on Word, Excel, and PowerPoint files directly within OnBoard to keep materials current, avoid version confusion, and ensure everyone is aligned on the latest updates.

Agenda AI

Use AI to automatically create structured agendas from simple prompts, plain language, or planning materials — turning scattered input into a clear, actionable starting point for every meeting.

Minutes AI

Utilize AI to capture transcripts, summarize key points, and generate a polished first draft of meeting minutes — all in one seamless workflow that saves time and supports accurate, compliant record keeping.

Book AI

Empower director meeting prep with AI that surfaces related documents, past decisions, and key context — so every board member arrives informed, focused, and ready to contribute.

iPad, iPhone & Android Apps

Stay connected and prepared wherever you are with secure, easy-to-use mobile access to board materials, consistently top-rated by directors for performance, reliability, and simplicity.

Assist AI

Accelerate board work with AI that acts like an on-demand assistant ready to answer questions, summarize content, and recall decisions across meetings, helping directors stay informed and in control.

Insights AI

Identify red flags, engagement gaps, and emerging issues before they escalate. This AI-powered tool helps board leaders anticipate risks, improve oversight, and guide the organization with sharper focus and foresight.

Actions AI

Keep decisions moving forward with AI that identifies follow-ups, flags unresolved items, and links them to future agendas — helping your board maintain momentum and continuity between meetings.

Voting & Approvals

A seamless platform that supports directors who need to make high-impact decisions from any device. Equipping directors and leadership to organize, track, review, comment, and approve decisions – from anywhere.

eSignatures + Docusign

Send and sign agreements securely from any device. Use built-in eSignatures or Docusign, keeping your signed documents and legal agreements organized in one platform.

Surveys

Collect input from directors quickly and securely with customizable question sets that support pre-meeting prep, post-meeting feedback, and everything in between — all within your board's trusted platform.

Board Assessments

Evaluate board performance with best-practice templates for annual reviews, peer feedback, and self-assessments — all designed to strengthen governance through structured, actionable insights.

Agenda AI

Transform Unstructured Ideas Into Ready-to-Use Agendas

No more staring at a blank agenda. With Agenda AI, you can describe your meeting in plain language—or paste in source materials like email chains—and get a thoughtfully structured agenda in seconds. It’s fast, flexible, and built to help every board meeting start with purpose.

Create Your Agenda

Generate your draft agenda by uploading an agenda in a document or by describing your meeting topics.

I want to create an agenda for my Q2 2025 board meeting from the draft doc I've shared. Include time for a Product & Engineering update and save 30 min for exec sessions.

Draft Agenda - Mar25_Final_Edited

Attach Document

Generate Agenda

+ Add New Section Manually

Generate Agendas from a Simple Prompt
Type a request like “Build an Audit Committee agenda” — and get a thoughtful, clear agenda framework in seconds.

Import Real-World Materials to Shape Your Agenda
Paste in your minutes doc, email conversation, or planning doc, and Agenda AI will extract the essentials and structure them into a usable format.

Designed for New Board Professionals, and the Experienced
Never built this kind of meeting before? No problem. Just describe what you need, and Agenda AI will guide you with a smart, pre-structured draft.

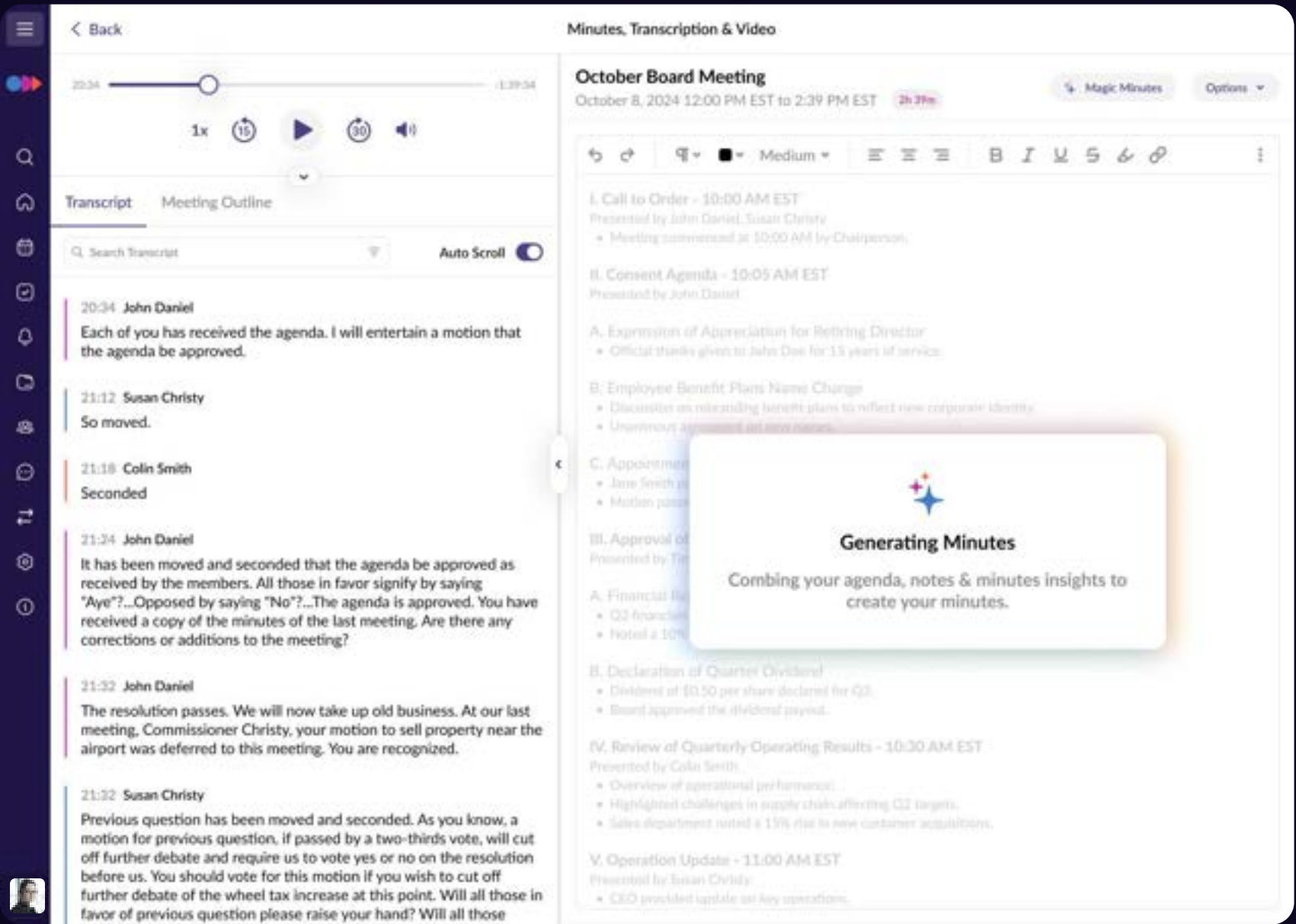


I. Welcome and Call to Order	10 min
II. Approval of Previous Meeting Minutes	5 min
III. Quarterly Financial Review	30 min
IV. Strategic Initiatives	30 min

Minutes AI

Magically Capture, Summarize, and Draft Your Minutes — All in One Click

Minutes AI redefines how boards capture and document their meetings. Record any session, get a full transcript, see a summarized outline of key points, and automatically generate a first draft of your minutes — all in one seamless workflow.



Accurate Transcripts and AI-Powered Summaries

Automatically capture every word and distill it into what matters most — decisions, discussion, and key actions.

Generate a Draft With One Click

Once your meeting wraps, Minutes AI builds a clean, editable first draft that aligns with your governance needs.

Total Control, Built for Transparency

Choose how much automation you want — edit, revise, or delete content as needed to match your board’s tone and recordkeeping preferences.





Assist AI

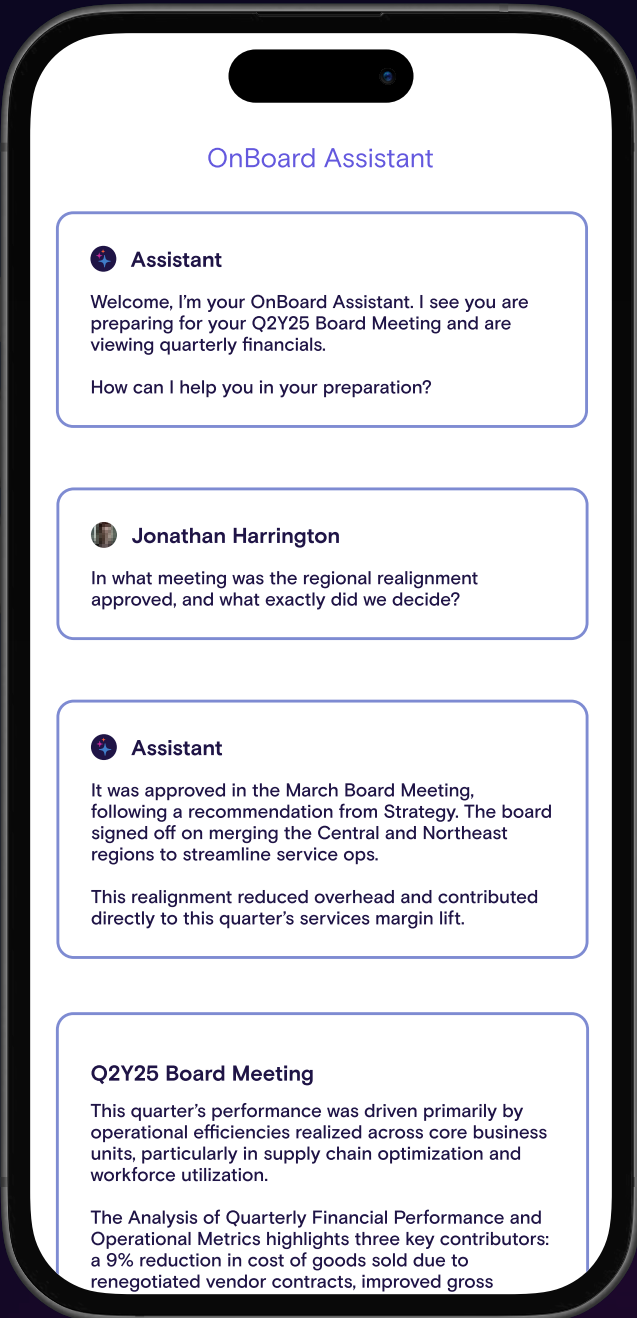
Your On-Demand Boardroom Copilot

Assist AI works like the expert assistant you’ve always wanted. It’s always available, always in context. Whether you’re reviewing a report, preparing for a meeting, or following up on board actions, Assist AI provides instant answers, summaries, and guidance. It’s there when you need it, designed to keep your board moving forward with clarity and confidence.

Systemwide Intelligence
Assist AI searches your full board archive—past and present—to deliver instant answers and insights, right when you need them.

Ask Anything, Get Clarity Instantly
Just type what you’re looking for—like you’d ask a colleague—to find key info, distill documents, or understand board history without switching tools or tabs.

Never Lose Sight of What Matters
Ask Assist AI to recall key decisions, summarize prior meetings, or surface past documents in natural language, all without breaking focus.



What Users Say

“Now everything is paperless and easy to use. As a person who has been on a lot of nonprofit boards, foundations, and other state boards, I think it’s a perfect tool.”



Ross Mugler
Board Director,
Old Dominion University
Board of Visitors

“OnBoard is very user-friendly and intuitive. Its features are simple to use. Training our board members was easy. OnBoard allows us to centralize all our board resources in one area and has streamlined communications. Overall, efficient, easy to use, great customer services & support.”



Nicole Crites
Executive Assistant
to the Interim CEO,
Mercy Corps

“OnBoard was a welcome addition to our board meetings. After using a homegrown paperless option for many years, we sought a more stable alternative with the right functionality. OnBoard fit the bill. It provides our board members with a user-friendly environment to access materials and stay current on Board meetings.”



Heather Fehn
Chief of Staff,
The College
of New Jersey

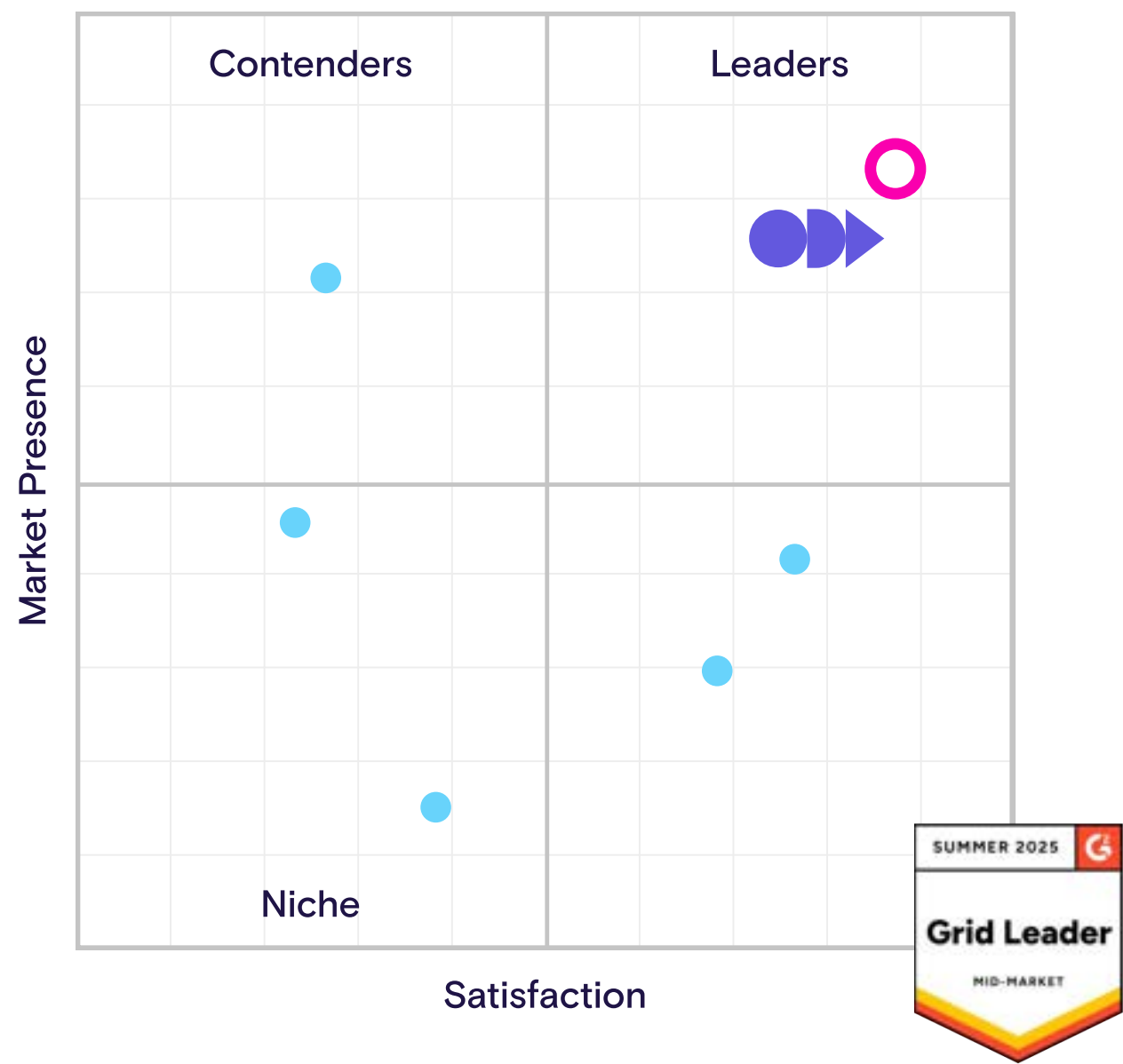
“OnBoard is an incredible partner to us. The platform is easy to use and adopt, making onboarding new directors easy and seamless. This solid governance foundation allows us to focus on advancing our non-profit board's mission of unlocking every student's potential.”



Sal Khan
CEO,
Khan Academy

The No. 1 Board Management Platform

Users consistently give OnBoard high marks for security, ease of use, and intuitive features, making it the leading board management solution on G2's Grid.



SoftwareReviews Champion
in Board Management



G2 Most User-
Recommended Board
Management Software



Capterra's Easiest to
Use Board Software



Top Rated Board
Management App



GetApp
Category Leader

“A simple automated solution to prepare and archive corporate matters. OnBoard has reduced prep time and improved accuracy. Features like search, annotations, and archiving make it extremely easy to use. It has helped improve meeting preparation and helps everyone stay on the same page.”



Justin Olson
Chief Information Officer,
Utah Community Credit Union

“On all the boards I’m involved with that use OnBoard, the directors are much more engaged. It gets you information that’s absolutely accurate and up to the second.”



Gary Lehman
Trustee,
Purdue University

“OnBoard is a great tool for leveraging our collective work, for supporting our governing practices, and for gaining efficiencies as we work together across the Granite Company boards.”



Shelly Bauerly Kopel
Partner,
Granite Partners

OnBoard Customer Support and Success

OnBoard has put our customers at the center of our business since the beginning. Our world-class Customer Success team allows us to bring our customers' voices to every internal meeting and decision.

They've helped thousands of teams across every industry plan, launch, and find value in OnBoard — fast. We're talking before-your-next-meeting fast. A combination of raw talent and years of experience means that from day one they'll be a resource you can always call upon. People who understand your industry, your board, and how your team uses OnBoard's unique capabilities.

Being a Customer Success Manager demands both grit and a big heart. Our team demonstrates an excess quantity of both.



Customer Support and Success

500+

5-star User Reviews
on G2

24x7

Best in Class 24x7
Team Support

99%

In-House Tech
Support Satisfaction

4.5/5

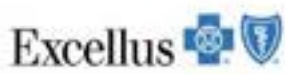
Average User Implementation
Satisfaction Score

9.5/10

Customer Experience Rating
on SoftwareReviews

10/10

Ease of Set-Up Rating
on G2



OnBoard Packages

Essentials

Essential tools to start delivering effective board governance

- ✓ Enterprise Security
- ✓ Agenda & Book Builder
- ✓ Mobile Apps
- ✓ Zoom Integration
- ✓ Annotations
- ✓ User & Group Permissions
- ✓ Calendar Integration
- ✓ Resource Library
- ✓ Assist AI



Premium

Accelerate effectiveness with data-based insights for more strategic meetings and enhanced productivity.

Includes every Essentials capability, plus:

- ✓ Minutes AI
- ✓ Minutes Builder
- ✓ Task Management
- ✓ Voting & Approvals
- ✓ Surveys
- ✓ eSignatures
- ✓ Training & Support
- ✓ Dedicated Customer Success
- ✓ Watermarking
- ✓ Microsoft 365 Integration

Ultimate

All the best-in-class capabilities to simplify complex governance needs at scale.

Includes every Essentials and Premium capability, plus:

- ✓ SSO
- ✓ D&O Questionnaires
- ✓ Skills Tracking
- ✓ Board Assessments
- ✓ Director & Executive Training

OnBoard Capabilities by Package

				Most Popular
CORE		ESSENTIALS	PREMIUM	ULTIMATE
Agenda and Board Book Builder		•	•	•
Agenda AI		Available	Available	Available
Automatic Book Building & Updates		•	•	•
Agenda Time Management		•	•	•
Notifications		•	•	•
Unlimited Groups		•	•	•
iOS, Android, Windows Mobile Apps		•	•	•
Zoom Integration		•	•	•
News & Announcements		•	•	•
RSVP Tracking		•	•	•
Calendar Integration		•	•	•
Resource Library		UNLIMITED	UNLIMITED	UNLIMITED
Homepage/Dashboard		•	•	•
Document Markup & Annotation Tools		•	•	•
Advanced Search		•	•	•
Meeting Feedback		•	•	•
INDUSTRY BEST SECURITY & COMPLIANCE		ESSENTIALS	PREMIUM	ULTIMATE
Azure GLBA, FERPA, HIPAA, FISMA, ISO-27001, -27701, SOC 2 Type II		•	•	•
AES-256 Encryption Transit/Rest		•	•	•
Two-Factor Authentication		•	•	•
User & Group Permissions		•	•	•
Disable Downloading & Printing		•	•	•
Mobile Device Remote & Idle Wipe		•	•	•
Watermarking			•	•

OnBoard Capabilities by Package

ADVANCED FEATURES	ESSENTIALS	PREMIUM	ULTIMATE
Assist AI	•	•	•
Voting & Approvals	Available	•	
Surveys		•	•
eSignatures	Available	•	•
Minutes AI	Available	Available	Available
Minutes Builder	Available	•	•
Microsoft 365 Integration	Available	•	•
Roles & Terms		•	•
Diversity Reporting		•	•
Shared Annotations		•	•
In-app Messenger		•	•
Task Management		•	•
Engagement Analytics		•	•
Public Posting		•	•
Skills Tracking		Available	•
Single Sign On (SSO)		Available	•
Board Assessments		Available	•
D&O Questionnaire		Available	•
Linked Subsidiary Accounts		Available	•
Agenda Collaboration		Available	•



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