



## America First Credit Union Case Study

Thayne Shaffer, Senior Vice President and Controller at America First Credit Union, shares how Convene helps the credit union achieve better security and faster communication in their meetings.

When America First purchased iPads for its senior management and board members, we moved from an old fashioned model of sending paper packets, to e-mailing a PDF file of various documents. However, we quickly learned that not everyone was on the same page from a functionality perspective, as there were different versions of meeting packets received (some were updated, while others were not) and that was a challenge in our board meetings. The board also used different PDF viewing apps, which made consistency difficult. We then tried Box.com, but that still didn't fulfil our needs to have a consistent viewer that was compatible with all devices. As a document repository, it fell short of meeting functionalities, like marking up documents. Finally, the credit union president, who was exposed to meeting solutions as a member of another board, prompted us to look for an option that best suited the needs of America First.

### Best for the Value

In our search for finding the right option for America First, we shortlisted five meeting solutions, but Convene easily came out on the top after we factored in the cost. With its highly efficient board portal for iPad, Android, Windows and Mac, Convene was a clear winner, offering great value for comprehensive features, such as ADFS, intuitive design and stringent security. Convene helped to streamline our board meeting processes to save time and money.

With security of the upmost priority for us, e-mail was not a secure enough option. With Convene, we received centralized access allowing all files to be viewed without leaving the application and customized access so we retained full control of who could view which meetings and documents.

### Drag and Drop Feature

Our financial accountant, Allyson Jorgensen, is an administrative user, utilizing the software mainly to build meeting packets and

**America First Credit Union (AFCU) provides personal financial services of superior quality to its members and owners. It is the 7th largest credit union in terms of membership and 12th largest in terms of asset size in the US.**



**“I like the drag and drop to create packets, and not needing to convert the documents. You can just drop anything in there.”**

Allyson Jorgensen  
Financial Accountant

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## Features

### Award winning security

- Multi-factor authentication
- Document encryption on server and on device
- Real time decryption
- Remote data wipe on lost devices

### Manage all stages of your meeting

#### Plan your meetings

- Attach documents to agenda items
- Control access & permission to files
- Digitally amend and distribute board packs

#### Engage your participants

- Start remote meetings
- Have real-time interactive presentations
- Lock participants' screens to the presentation
- Vote on items and approve documents

#### Follow-up easily

- Send a meeting summary immediately
- Track actions after the meeting
- Review previous meetings and documents

#### Quarterly upgrades

- Convene is updated every quarter. An upgrade is done when it is convenient for the client.

schedule upcoming meetings. Features she particularly finds convenient and helpful are the change notifications, user access customization and agenda builder. She no longer needs to convert the documents; she simply drags and drops them to create packets. She also likes the fact she can see who amongst the members has access to the packets, adding another layer of security e-mails just can't provide.

## Great User Experience

Thanks to Convene, everyone is working with the same platform, referring to and using it the same way, and helping each other out. The uniformity was once a challenge, but is now a great benefit to several of our committees within the credit union. We all receive notification of any changes in real-time, so we are immediately alerted if a file has been updated. No one is left in the dark, so no one is lagging behind in receiving information.

We also appreciate the fact that we can make mark ups on documents, like working with actual paper, minus the waste and the inconvenience. In that sense, Convene doesn't feel like a completely new technology to us. In fact, our board and committee members of all ages learned their way around Convene within an hour of using it on their own devices. Convene's omni-platform feature really propelled us forward, providing employees and board members the freedom to use the device they're most comfortable using on a day-to-day basis.

**"No one is left in the dark, so no one is lagging behind in receiving information."**

Thayne Shaffer,  
Senior Vice President and Controller,  
America First Credit Union

Book your 30-day free trial at  
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