



Institute of Corporate Directors Case Study

Roberto Manabat, a member of the Board of Trustees of the Institute of Corporate Directors, shares how Convene is helping in making board meetings more efficient and productive.

Faster Material Distribution

Similar to many organizations, the Institute of Directors previously conducted meetings in a physical fashion. “Basically, it was all paper-based in the past,” Manabat recalled. Before using Convene, the lack of time for distributing meeting minutes and board packs to board members was apparent. “The usual problem in meetings is that the minutes of the meeting usually come two days before the next meeting, which is three months from now. So it is going to be hard to recall what was discussed in the meeting.”

Moreover, he said that they do not have time to review papers beforehand. “The materials are not sent way ahead, it is only in the meeting itself that we see the documents,” he added.

But with Convene, board members can view and send meeting documents easily. “In Convene, everything is easy to document,” said Manabat. Updated versions can also be uploaded right away, eliminating the need to reprint and redistribute paper-based meeting packs.

Real-Time Page Synchronization

Before, board meetings at the Institute of Corporate Directors painted a picture of a room full of board members who are all busy flipping through hundreds of pages. Now, with Convene, they are easily able to navigate board packs at the touch of their fingertips.

“I think the beauty of Convene is that in the meetings, if your mind wanders around, you are brought back right away because it’s right there in front of you. You are able to follow proceedings even without touching anything,” Manabat said.

Since its establishment in 1999, the Institute of Corporate Directors has been committed to raising the standards of good corporate governance in the Philippines. It offers corporate governance learning solutions specifically for board members and key executives. ICD has been using Convene since April 2016.



“Convene enables you to become up to speed with what’s happening. It has improved our meeting experience and has helped us achieve our organizational objectives.”

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.

Innovative Features

Aside from Convene's pre- and post-meeting features, Manabat emphasized the annotations feature a lot especially the Sticky Notes. "It allows you to comment [directly on a particular section]." Comments through the Sticky Notes can be shared with all of the members of the meeting and are also included in the file when the meeting pack is exported. He also appreciated the Permissions feature where administrators of the meeting can choose to allow or restrict access to individual agenda topics or files.

"But I think the best benefit is the offline feature," he added. "Even if you are not in the meeting, it is as if you are really there because you can keep track of the flow of meeting agendas." Convene's offline features allows meeting documents to be downloaded and accessed even without internet connection. Through this, board members can read and annotate on meeting packs whenever and wherever.

Heightened Productivity in the Boardroom

Given the impact of technological advancements in the workplace, Manabat notes that the idea of shifting into a digital environment will reap benefits for companies in the long run. "Technology is changing the way we do things," he admitted.

And as they say, best practices start at the top and it is a must that leaders are updated with the latest news. "It is critical that the person who is managing the meeting would be up to speed in the proceedings."

Moving forward, he believes that using Convene is a step in the right direction because it allows them to have more engaging and more

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