

# Implementation at a Glance: What Are the Next Steps?

The Nasdaq Boardvantage implementation process typically takes four to six weeks to complete

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## STAGE 01 INTRODUCTION & PORTAL CREATION | Completed **six weeks before** the board meeting

- Meet the implementation team
- Finalize the paperwork, implementation plan and portal launch
- Schedule a kick-off call within one week of signing the contract
- Create and prep portal for admin account set up

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## STAGE 02 ADMIN TRAINING | Completed **three to four weeks before** the board meeting

- Conduct two group training sessions with all admins (90 minute sessions)
- Schedule additional training as needed (30-60 minute sessions)

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## STAGE 03 EXECUTIVE & BOARD ROLL OUT | Completed **one to two weeks before** the board meeting

- Review different training options available to end users during kick-off call
- Verify roll out plan and provide end user roll out template
- Finish setting up all end users in the portal and share registration links
- Download the Nasdaq Boardvantage app

### End User Training Options

- **Live Online Training:** 30 minute live mobile training sessions offered twice a day every Tuesday and Thursday (11:00am and 4:00pm ET)
- **Group Training:** One customized training session via WebEx – the session will be recorded and loaded into the client portal
- **Trainer Training:** One training session (60 minutes) and a follow up session (30 minutes) with a member of the client's staff, who will be trained to roll out internal training sessions

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## STAGE 04 PORTAL LAUNCH & BOARD MEETING | Completed **one week before** the board meeting

- Check that the boardroom has Wi-Fi access
- Upload meeting materials into portal and notify end users that documents are ready
- Make last-minute changes to the board book as needed

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## STAGE 05 BOARD MEETING | **The board meeting takes place**

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## STAGE 06 POST MEETING FOLLOW UP | Completed **one week after** the board meeting

- Conduct a call to debrief on board meeting
- Collect feedback about the meeting and portal user experience
- Review retention settings and discuss any portal clean up needs

