

Governance Notes

Five Tech Tools That Governance Professionals Can Use Right Now

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Governance support professionals are highly productive. Metaphorically, I liken our level of output to an iceberg. Above the surface, we're administrating board meetings, onboarding new members, managing staff, and facilitating board education programs. However, under the surface, much of what we do—a million or so tasks—others never see. I believe we'd all agree that in the last few months our level of productivity has increased, particularly in our utilization of technology. Tech is becoming more of a necessity and the use of software in our everyday operations continues to grow. Governance professionals shouldn't overlook the fact that there are technologies that could help us be more productive in the board office. Fact is, taking a pass on a periodic review of your technology toolkit for upgrades isn't really an option. Due for a review? Here are five technology tools that will help governance professionals accomplish more.

1. Email Templates

Using Microsoft (MS) Outlook calendar to schedule board meetings

is a common practice among governance professionals. But, there are two additional MS Outlook functions that may be overlooked: email templates and delayed email.

Email templates allow the user to create a library of templates which include information that infrequently changes from message to message. The template can be saved and sent later as an email message. New information can be easily added to a template before a new email is sent.

How can governance professionals use email templates? Create templates for repetitive emails where the language doesn't change. Create email templates for upcoming meeting reminders and/or emails that solicit documents from a committee lead for a meeting. The language on these types of emails is relatively standard and repetitive. Create the

template once, and simply change the morning/afternoon salutation and the date, and press send. [Learn more about this time and wrist saver.](#)

2. Delayed Email Messages

The delayed email message feature in Outlook allows the user to do just that—delay an email for a period of time before it is sent to the recipient. The delayed email can be scheduled and sent automatically after the number of minutes, hours, days, or weeks specified by the sender.

How can governance professionals use delayed email messages? Use the delayed email feature to schedule email reminders to committee leads about information for upcoming submissions for meetings ahead of time. Schedule birthday messages to the board members at the beginning of the year that automatically send

Key Takeaways

- Utilize email templates and delayed email message functions to increase efficiency and save time.
- A smart notebook can be helpful with creating and organizing meeting minutes.
- A transcription software can be a lifesaver for taking meeting minutes. Reduce your stress by being able to reference a recording of the meeting later and/or have a transcription automatically generated.
- Get creative with video/image capture and sharing platforms. Try using this to enhance board member engagement and create memorable experiences for board members and your team.



(on the date you specify) throughout the year. There's one caveat to using this gem of a tool though, MS Outlook must be active and open in order for your scheduled messages to send. In other words, if you go on vacation and Outlook is turned off, the delayed email messages will automatically send the next time the program is opened. I would be remiss not to mention that governance professionals who use Google Suite can delay an email for up to 48 years! [Learn more about scheduling delayed email messages.](#)

3. Rocketbook

Rocketbook is a smart notebook with cloud integration capability. The notebook is reusable infinitely, which reduces both the utilization of paper and the associated costs.

How can governance professionals use Rocketbook? Governance support professionals have different styles when it comes to taking minutes. One professional may opt to type notes during a live meeting, another may choose to record a meeting and draft minutes post meeting. For some professionals, writing assists in retention of information. Pair this preference with Rocketbook Everlast's look and feel of real paper, and add the fact that your work product can be electronically archived as a PDF, retained in the cloud, and/or downloaded to your laptop or PC, and you've got a tech winner. [Preview the Rocketbook product line.](#)

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4. Otter.ai

Otter.ai is a speech to text recognition transcription software that listens to voice conversations and generates text that is synchronized with audio, speaker tags, and summary keywords.

How can governance professionals use Otter.ai? Minute taking is a key function of what governance professionals do. Consider Otter.ai your digital body double. Need to step away from a board meeting to manage an unexpected issue? With Otter.ai in use, not only will the meeting be recorded,¹ but the notes will be displayed in relatively accurate text. The software will even color code the various speaker voices and has Zoom integration. For those governance professionals who want to utilize the software, Otter.ai for Business offers more security than its free offering. [Learn more about Otter.ai.](#)

5. Snagit

Snagit is a video and image capture and sharing platform. Snagit installs on your laptop/desktop and does way more than just capture screenshots.

How can governance professionals use Snagit? Governance

professionals can enhance board member engagement through customized videos and images. Create memorable member experiences by offering short video birthday messages to board members. Send a birthday wish easily via email. Create instructional videos or documents customized for the board on subjects such as accessing Zoom meetings and/or tips for using the board portal. Use Snagit's annotation feature on a screengrab to highlight a point of reference. Snagit is a tech tool that governance professionals didn't even know we needed until we used it. [Learn more about Snagit.](#)

Governance professionals can be stewards of technology within their organizations by building and utilizing the power of their toolkits. But as we know, *with great power comes great responsibility*. One of our responsibilities in introducing new technology is to ensure its security. Most of the technology we use today has some degree of security risk; the five highlighted in this article are no exception. However, by enlisting the guidance of your organization's chief information officer on how to properly incorporate these tools into your organization's security landscape, you'll be expanding your repertoire of tech go-tos in no time.

¹ If board meetings are being recorded, board members and others present at meetings must be made aware in advance and provided information on how the recording will be used and stored or destroyed, according to the organization's bylaws and applicable state/local regulations.

The Governance Institute thanks Simone Bellamy, Chief of Staff and Assistant Corporate Secretary, Saint Peter's Healthcare System, for contributing this article. She can be reached at sbellamy@saintpetersuh.com. Note: The author does not have any financial relationships with the companies mentioned in this article.

