



Member & Director Training Guide

Facilitator Checklist for New Users

Use this checklist to guide a clear, efficient onboarding session for board and committee members. Click the hyperlinks to access related help articles.

Find more trainer-readiness resources in the [Train-the-Trainer Toolkit](#).

For additional questions or technical support, email help@onboardmeetings.com

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1 Introduce OnBoard

Sample introduction: OnBoard provides a single, secure place for members, directors, and trustees to access meetings, review materials, prepare with the Meeting Book, and stay informed, so they can focus on decisions instead of logistics.

2 Signing In

Show members how to bookmark <https://app.onboardmeetings.com> and download the free OnBoard Meetings app for iOS and Android phones and tablets.

3 Navigating the Homepage

Demonstrate how to quickly access upcoming meetings, governance actions, and review announcements.

4 Exploring the Meeting List

Review the Meeting List as the full record of past, current, and upcoming meetings along with all related documentation.

5 Viewing a Meeting

Show how to RSVP, review the agenda, and select **Open Book** to access meeting materials.

6 Opening & Navigating the Meeting Book (Open Book View)

Highlight the Meeting Book as the primary place to review and prepare, with the agenda and materials displayed side by side.

7 Creating & Sharing Annotations

Demonstrate how to create private annotations that sync across devices and share them when enabled.

8 Accessing & Navigating Resources

Review how to access secure, long term documents such as policies, bylaws, and historical materials.

9 Viewing the Directory & Updating Profile Information

Show how to view other active members and update personal profile details and account settings.

10 Accessing Help & Support

Point out guides, help center articles, videos, OnBoard Academy courses, and support available within OnBoard.

Encourage members to focus on finding meetings, using Open Book, and preparing with annotations to build confidence quickly.