OnBoard

Preparing for a Successful Board Training

Overview

Training your board members in OnBoard sets the foundation for longterm adoption and confidence.

Follow these steps to prepare your portal, create a realistic demo meeting, and deliver a smooth, hands-on training experience from day one.

Find more trainer-readiness resources in the Train-the-Trainer Toolkit.

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

Updated Date: March 2026

---

1 STEP 1
Set Up Your Directory and Groups

Add members to the Directory and organize them into Groups before sending invitations so permissions are in place when accounts are activated.

2 STEP 2
Prepare Your Demo Meeting

Build and publish a realistic demo meeting using familiar content so members can focus on learning OnBoard, not interpreting new materials.

3 STEP 3
Set Up Resources

Populate Resources with key documents members will reference year round, ensuring folders and permissions are ready for training.

4 STEP 4
Send Invitations to Members

Invite members only after meetings and resources are fully configured so they can log in during training and follow along hands on.

5 STEP 5
Follow a Proven Training Agenda

Guide members through core workflows: logging in, navigating meetings, opening the Book, and using Resources, to build confidence quickly.

6 STEP 6
Apply Best Practice Training Tips

Use a demo member account and be familiar with the mobile and tablet apps to accurately reflect the member experience during training.

⭐ Trainer Tip

After completing your preparation, use the Board Member Training Guide as a reference for structuring and delivering your session.