A Guide for Clerks

How to Pick the Perfect Meeting & Agenda Management Software

Introduction

Investing in technology? Always a big decision.

But when it will be paid for by taxpayers, used by local leaders, and engaged with by the community, the decision can feel even bigger.

Don't worry. That's what this guide is designed for, to help you get it right. Whether you're just getting started with meeting & agenda management software or considering a new solution, this guide will give you a foundation for making an informed decision for you and the community.

Keep reading to gain a steady footing for picking the perfect meeting and agenda management software. We'll start with the basics and move toward tips and trends.

What Is Meeting & Agenda Management Software?

Goodbye Paper, Hello Painless

Meeting and agenda management software takes common time-intensive tasks and either automates them or makes them easier to do. Software can help you prepare agendas, manage approvals, track meeting votes, record and publish minutes, email subscribers your minutes, and much, much more.

But software doesn't just make the workday easier for clerks. It can make it easier for leadership to review and approve agendas. It can also make it easier for your community to stay informed on community projects.

BENEFITS

When you pick the perfect software, good things happen. You can:

- Recover 40 hours a month from agenda processes.

- Save up to $300,000+ yearly on paper alone.

- Engage the community with their public meetings.

- Improve transparency.

- Get home on time.

> "*Managing the agenda process was a full-time job. It was especially difficult and time consuming to track and compile different versions of documents in order to consistently produce a quality work-product for our board of directors and the public.*"
>
> *— Linda Nemeroff, AC Transit District Secretary*

Quick History of Meeting & Agenda Management Software

Executive Summary for Clerks

FROM PAPER TO ON-PREMISES TO THE CLOUD

Early agenda management software was installed onto a computer hard drive. The only way to access it was to use a computer that had it installed. The software (called "on-premises software") could take up a lot of space and often had to be managed and updated by IT teams.

Today, the best meeting and agenda management solutions are available in the cloud. Meaning, they're stored online and accessible from anywhere that has an internet connection.

"With everything stored in the cloud, there's no longer a risk of losing any of our archived material." — Becky Batten, IT, Pinellas County, FL

FROM FULL-SERVICE TO SELF-SERVICE

As clerks have used technology and moved services online, two things have happened. First, local leaders are able to login and accomplish the work they need to online. Second, the community no longer needs to call or visit the office to get service since they can accomplish most tasks by themselves on the city website — or even subscribe to receive meeting minutes automatically. You're able to meet community needs better. Without cutting corners on service. Without staying after hours.

Best Practices

5 Tips for Buying Better Software

MAKE A WISHLIST

In a perfect world, what do you want to achieve through your new software? There will be plenty of time later to be more practical and budget-concerned. For now, make a list of everything you want to make easier and better through digital transformation of your clerk duties.

BRING PEOPLE IN EARLY

Connect with strategic stakeholders (city leaders, for example) about your process and goals in order to refine your wish list. Also ask around: has anyone in your organization used the software before? They may have recommendations. By looping in stakeholders at the beginning, you're also developing that critical buy-in you'll need later in the process to make sure you get the software you need.
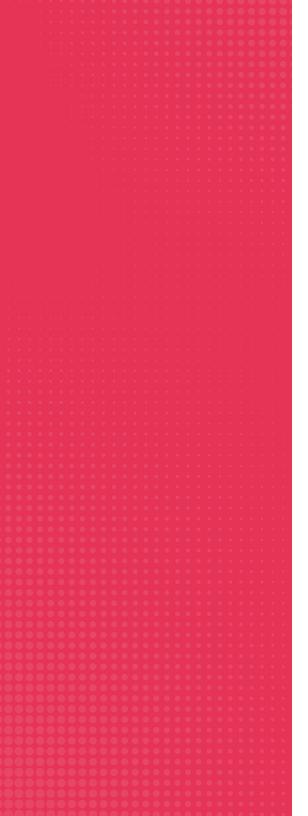
SEE THE SOFTWARE IN ACTION

Reading about software will only take you so far. You have to see it. After doing some research online, schedule product demonstrations. How intuitive is the software actually? How does it stack against your wish list? How secure is your data? Your product demonstration is your time to get a better understanding of what the software can do. Ask questions! (Don't know what to ask? See "Vet the Company" and "Checklist for Getting Started" sections below.)

REMEMBER INTEGRATIONS

Can the solution integrate with others? Whether your needs shift or opportunities arise, there will come a time when you want to add more digital tools to your toolbox. From video to email to website integrations, the best solutions make that happen easily.

Integrated solutions reduce your workload, too. Rather than logging in to multiple solutions and transferring information from one place to the other, you can accomplish everything you need in one place. Integrated solutions also help you:

- Reduce contracting complexities.

- Lessen workloads for IT management.

- Offer a single point of contact for handling all of your needs.

VET THE COMPANY

You need to make sure the software itself works for you. But it's also important to vet the company that makes the software. Are they going to be around in the long-term? Here are a few things to consider.

Designed for Local Gov: How well does the company understand what you do? Is the solution designed specifically for government? If not, then it may overlook key requirements, such as ADA compliance, and not be ideal for you and the community.

Does the company have former clerks as key employees in developing these products? Do the company's employees appreciate and value the work you do? Do they seek customer input on product development?

Maturity: How long has the company been delivering software? Are they tried, true, and tested? Or are they green and still learning?

Finances: How sound is the company? Do they have financial backing to support stability, growth, and innovation?

Customer Success: Will the company ensure your success through ongoing programs (training, etc.) that help you get the most from your software — even after implementation? Or will you have to handle that on your own?

Security: Are they committed to your data security? Do they have any certifications or validation to prove they are doing what's necessary to keep your information safe? Bring in your IT team to help you answer these questions.

History of Innovation: Does the company have a history of innovation? Are they consistently releasing new products and features that improve your work or how you support your residents?

References: Does the company have solid references? Ask them for customers you can call to get first-hand feedback on their software, implementation, and support experiences.

3 Common Mistakes

Bloopers, Bungles, & Blunders to Avoid

At Granicus, we've spoken with tens of thousands of clerks over the decades. Here are some things to avoid when considering meeting and agenda management software.

CHOOSING LOOKS OVER FUNCTIONALITY

Don't be distracted by a color or other superficial design elements. Stay focused on what really matters: how useful and reliable the software is.

FOLLOWING A FAD

Software companies can be like fads that come and go. Will the software be around in five years? If not, you'll be going through the process of finding new software, migrating content, and re-training staff all over again.

NOT GETTING PROPER BUY-IN

The clerk's office doesn't operate in a silo. Neither should software solutions. Loop in stakeholders early on to make sure you don't encounter any surprises or delays later. A shortlist? The City manager, IT head, communications staff, and anyone who frequently submits to the agenda.

"*When you go to the City Manager for budget approval, be prepared to show them how much time it can save you, and that what you can do with that time is a bonus.*"

— Sharon Washington, City of Castle Pines, CO

A Checklist for Getting Started

For a Perfect Product Fit

Use this checklist as a starting point when vetting various software options. The best meeting and agenda management software fits your needs plus those of users, local leaders, and other stakeholders, such as IT.

YOU

Before the meeting, can you:

- [ ] Easily generate professional-looking agendas in seconds?
- [ ] Send meeting materials to stakeholders with the click of a button?
- [ ] Get agenda approvals and changes quickly?
- [ ] Collect online citizen feedback?

During the meeting, can you:

- [ ] Automatically capture in-meeting actions, motions, and votes in real time?
- [ ] Live stream to multiple platforms & record comprehensive public meeting records?

After the meeting, can you:

- [ ] Finalize meetings minutes quickly?
- [ ] Publish agendas & minutes to a web page with a click?
- [ ] Send meeting materials to specific distribution lists with the click of a button?

LOCAL LEADERS (MAYOR/ COUNCIL/MANAGERS)

Can they:

- [ ] Prepare for a meeting by quickly reviewing past minutes?
- [ ] Receive instant updates when agendas are published or modified?
- [ ] Review & approve agendas from their mobile device or tablet?

COMMUNITY MEMBERS

Can they:

- [ ] Find meeting information online without calling the clerk's office?
- [ ] Subscribe to receive email notifications & updates on public meetings?
- [ ] Search, find, and review meeting videos, agendas, and minutes that interest them — regardless of their accessibility needs?

IT

Does the solution:

- [ ] Have responsive customer support for troubleshooting issues?
- [ ] Meet the highest levels of cyber security requirements?
- [ ] Have a robust, secure data center strategy (location, redundancy, encryption, recovery time)?
- [ ] Have a track record of successful implementation?

govMeetings: a Solution to Consider

If you're looking for a solution, consider Granicus govMeetings. We help 6,000 governments across the U.S. get their jobs done faster and more efficiently through a platform of digital government solutions, including public meeting and agenda management software that's purpose-built for government.

WHAT CLERKS SAY ABOUT GRANICUS

"Granicus makes me look good. The customer service team takes great care of us. If we have an issue, they're right there connecting us to a solution. You can't get better service than that. They're like friends and family. I mean that." —Chuck Storey, Clerk-Recorder, Imperial County, CA

"Granicus saves you clicks, it's easier to use, it's easy to pick up, and results in less training time." —Toni Taber, City Clerk, San Jose, CA

"Time has been the biggest benefit of govMeetings. It makes my job so much easier, and I can focus on other things. I never have to stay late anymore." — Rhonda Coxon, Town Clerk, Snowmass Village, CO

BUSY CLERKS CHOOSE GRANICUS

START YOUR JOURNEY

Visit **granicus.com/see-it-live** to schedule a govMeetings product demonstration.