



Swadhaar FinServe Pvt. Ltd. Case Study

Anshu Mohta, Company Secretary and Head of Compliance, shares how Convene has empowered their board to have a convenient and seamless meeting experience.

Elimination of Huge Meeting Packs

Anshu recalled the time they had to print a lot of papers just for meeting purposes. “We used to print agenda papers and we used to circulate those agenda papers. Our agenda papers used to be huge, like around 150 papers in a pack.”

Eventually, one of their directors realized that they should switch to a sustainable solution. “One of our board members suggested that we are wasting a lot of papers and we should look into other modes of [conducting] meetings. From that, we started looking into alternatives,” she said.

Convenient and Comprehensive Solution

During the selection process for the right solution for their organization, Swadhaar shortlisted a number of vendors. “We looked into other board meeting solutions, as well as some Indian options also.” However, they felt that most lacked key features that Swadhaar required for their company. “They were mainly providing experience for the post-meeting processes, not for the entire meeting package. The e-meeting package is the side that Convene gives,” she recounted.

Anshu stressed that the majority of the solutions they assessed only addressed administrative needs. “Most of them were from a secretarial point of view [in a sense that] before a meeting you can plan [and make preparations] and in the post-meeting you can [distribute] papers. It was not like Convene that during a meeting everybody can go to the same presentation. That was not available [in other solutions].”

The deciding factor that made them choose Convene was the unparalleled meeting experience that it offers. “First of all, we find it very convenient and efficient. We wanted our board meeting process to be seamless, and we got that from Convene. It was very user-friendly and [we found it] easy to upload documents. That’s why we chose Convene,” she shared.

Real-Time Collaboration

One of the aspects that their organization found very useful was Convene’s real-time and interactive presentation features. “The feature that we liked most in Convene is that during presentations, everyone is on the same slide in real time.”

Swadhaar’s mission is to make available, responsible, and efficient financial services to economically vulnerable urban households, enabling them to attain financial security and meet their aspirations. They have been using Convene since April 2017.



“Our board’s work has been simplified. When you need to add some papers, it gets really easy to put those in Convene. In other solutions, it used to take a lot of time. We are really happy using Convene.”

Features

Award winning security

- Multi-factor authentication
- Document encryption on server and on device
- Real time decryption
- Remote data wipe on lost devices

Manage all stages of your meeting

Plan your meetings

- Attach documents to agenda items
- Control access & permission to files
- Digitally amend and distribute board packs

Engage your participants

- Start remote meetings
- Have real-time interactive presentations
- Lock participants' screens to the presentation
- Vote on items and approve documents

Follow-up easily

- Send a meeting summary immediately
- Track actions after the meeting
- Review previous meetings and documents

Quarterly upgrades

- Convene is updated every quarter. An upgrade is done when it is convenient for the client.

Moreover, she said that Convene allowed board directors to focus their attention on the right sections of the presentation. "During board meetings, we don't need to use a projector anymore. Everybody is on their own laptops. The presenter can guide [other participants], so they don't have to look at different pages all the time. Everybody is on the same page when the presentation is going on."

From Dropbox to Convene

Anshu said that they used Dropbox in the past but it was not able to fulfill their organizational requirements. "We used to share documents through Dropbox. In Dropbox, you can just upload documents. It does not allow real-time collaboration and presentation."

She highlighted Convene's ability to be used in remote meetings, which they found very useful. "If somebody is not there in the room or is in another part of the country, you would have to ask him or her to go to this slide. [In Convene], the presenter drives the entire presentation and he or she can take the person wherever he or she wants to."

Positive Feedback from Our Board

Anshu concluded by sharing how directors are very pleased with their experience with Convene. "We received very good feedback from our board."

She also added that their board members have even referred Convene to other organizations that they are a part of. "In fact, our board members have referred Convene to their other companies. I have introduced two or three people to Convene through Paul (senior sales executive). We have a lot of very good reviews from the board members and they're really happy using it."

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