



## Coastline Housing Association Case Study

### David Wingham, Director of Corporate Services at Coastline Housing, explains why his organisation chose Convene, after a competing software had let them down

Our organisation's going through a digital transformation. We expect our customers to do more online, and expect our staff to take advantage of technology too.

Before using Convene we'd tried a different product, but it hadn't worked out. The software didn't do what we needed it to do. It wasn't very user friendly and we were constantly frustrated. If there was a system update it lost all the history. And it didn't work across all platforms either. Coastline uses Windows and the first part of a meeting would be spent faffing about with the technology, instead of getting on with the agenda.

### An Easy Transition from Paper to Digital

So we looked around for a better option. Our governance administrator and myself had both come across Convene and liked what we saw, so we compared notes and decided to give it a trial.

We found Convene really quick and intuitive to use. It was the functionality that swayed us. It did exactly what we wanted.

We started using Convene for our weekly executive team meetings about a year ago, and it's gone really well. There used to be a thick set of papers for each meeting but with Convene it's all on the tablet. You can do everything you need to, without the need for hard copies.

### Make Changes or Add Notes to Documents

You can make notes on documents and share your notes with others in the team. I can sit at my desk or at home and add a comment, and my colleagues will see it when they next log in. It means I can give them a 'heads up' about something we need to look at before we meet, so we can go away and do some homework before the meeting. It's a really efficient way of working. Before, I'd have had to send round a separate email or go and find them. Now I can do it all quite naturally through Convene.

**Coastline Housing is a community-based housing association with over 4,000 homes across Cornwall, and around 250 staff.**



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## Features

### Award winning security

- Two 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
- Set up custom access for guests
- 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

### 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.

Coastline's now started using Convene for board meetings and most members have taken to it very readily. Some are a little reluctant, but that's to do with using tablets rather than with Convene. Once they get the hang of swiping and using a tablet, Convene is very intuitive. They can use sticky notes and highlight things if they wish, just as they would with paper. It works really well.

The administrators find it easy to use too. They can put the files together for the meeting really quickly so there are savings in terms of time, photocopying and posting big fat agenda packs. And if one or two board members still want hard copies we can print them out from Convene with no problem.

## A Record of Previous Meetings and Documents

In the old days I'd have a cabinet full of board papers, and if I wanted to refer to my notes on an old document I'd have to trawl through the filing cabinet. But with Convene all the past papers are there, with my notes (and those shared by others) saved on the documents too.

There's the potential to use Convene for our monthly management meetings, with the next tier of management. They already all have tablets so it would make sense that we go that extra step, in due course.

*Interview with David Wingham, Director of Corporate Services at Coastline Housing, May 2016.*

Book your free trial and demo at [azeusconvene.com/start-trial](http://azeusconvene.com/start-trial)

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