



America First Credit Union

Thayne Shaffer, Senior Vice President and Controller at America First Credit Union, shares how Convene helps the company achieve better security and faster communication in their meetings.

When we got iPads for senior management and board members, we moved from mailing paper packets, to emailing a PDF file of different documents.

But we soon found out that everyone wasn't on the same page. People received different versions of meeting packets. Some people used different PDF viewing apps.

We then tried Box.com that we already had installed for other purposes. It didn't last long. As a document repository, it lacked meeting functionalities, like marking up documents. It also wasn't secure enough for our purposes.

Finally, the company president, who was exposed to meeting solutions as a member of another board, prompted us to look for one that best suits AFCU.

“Number one factor was that it is secure”

Email was not secure enough, because certain board members had email addresses in environments outside the IT team's fire walls.

But with Convene, the number one factor was that it is secure. We get centralized access so that we can view everything without leaving the app, and customized access. We can control who can see which meetings and documents. We all receive notification of changes in real time, so we are immediately alerted right away if a file has been updated. No one is left in the dark.

The uniformity was once a challenge, but Convene took care of that. Everyone is on the same page.

“Good and intuitive design”

Our financial accountant, Allyson Jorgensen, is an administrative user. She uses the software mainly to build meeting packets, and schedule upcoming meetings. Features she particularly find convenient and helpful are the change notifications, user access customization, and agenda builder.

She doesn't need to convert the documents; she simply just has to drag and drop them to create packets.

America First Credit Union (AFCU) provides personal financial services of superior quality to its members and owners. It is the 7th largest credit union in terms of membership and 12th largest in terms of asset size in the US.



“I like the drag and drop to create packets, and not needing to convert the documents. You can just drop anything in there.”

Allyson Jorgensen
Financial Accountant

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Features

Security

User authentication	✓
Document encryption (server-side)	✓**
Document encryption (mobile device)	✓**
Network encryption	✓**
Disable account after <i>n</i> login attempts	✓
Wipe data after <i>n</i> login attempts	✓

Pre Meeting Management

Attach documents to an agenda	✓
Drag and drop documents to an agenda	✓
Support agenda items with no attachments	✓
Distribute meetings and docs to participants	✓

Meeting Presentation

Start remote meeting	✓
Real-time interactive presentation	✓*
Force participants to follow presenter	✓
Navigate via page thumbnails	✓
Laser pointer tool	✓
Voting	✓

Post Meeting Management

Send meeting summary email	✓
Review past meetings	✓
✓* Synchronized page navigation, shared annotations	
✓** Wireless network transmissions between Convene and its web portal are encrypted via 2048-bit Secure Sockets Layer (SSL)	

Our board and committee members of all ages were able to learn how to use Convene within an hour of playing with it on their own devices.

Convene's omni-platform feature really helps, because people have the freedom to use the device they're most comfortable with, whether it's an iPad or not.

"Best for the value"

We eliminated some competitors, because of lacking features. We shortlisted five to six meeting solutions, but Convene easily came out on the top for its capabilities. After we factored in the cost, it's a clear winner. We get good value for comprehensive features (such as ADFS), intuitive design, and most importantly, stringent security.

*Thayne Shaffer, Senior Vice President and Controller,
America First Credit Union*

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"We shortlisted five to six meeting solutions, but Convene easily came out on top for its capabilities."

Book your free demo, visit:
azeusconvene.com/enquire

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Email: sales@azeusconvene.com

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