



# Convene inTeams

## Built for teams in Teams

### Introducing Convene in Teams

Maximise the collaborative capabilities of MS Teams through expert governance tools made accessible in one platform. Simplify workflows for all leaders and administrators in the organisation to enable best-practice enterprise leadership meetings within Teams.

Made for all types of leadership meetings, CiT brings all meeting capabilities and integrations that leaders and administrators need all in one place within MS Teams. CiT allows for more effective governance, empowering users to maximise the way they utilise MS Apps and Teams throughout the meeting cycle.



Teams



Azure Active Directory



Sharepoint



Office 365



Microsoft Exchange

The image displays a collage of screenshots from the Convene inTeams application. The top screenshot shows a dashboard with 'Current Meetings' and 'Upcoming' sections for February 26-28, 2021, listing various board meetings. The middle screenshot shows a video conference in progress with four participants. The bottom-left screenshot shows a detailed meeting agenda for a 'Special Board Meeting' on Friday, Feb 26, 2021. The bottom-right screenshot shows a mobile view of the meeting pack.

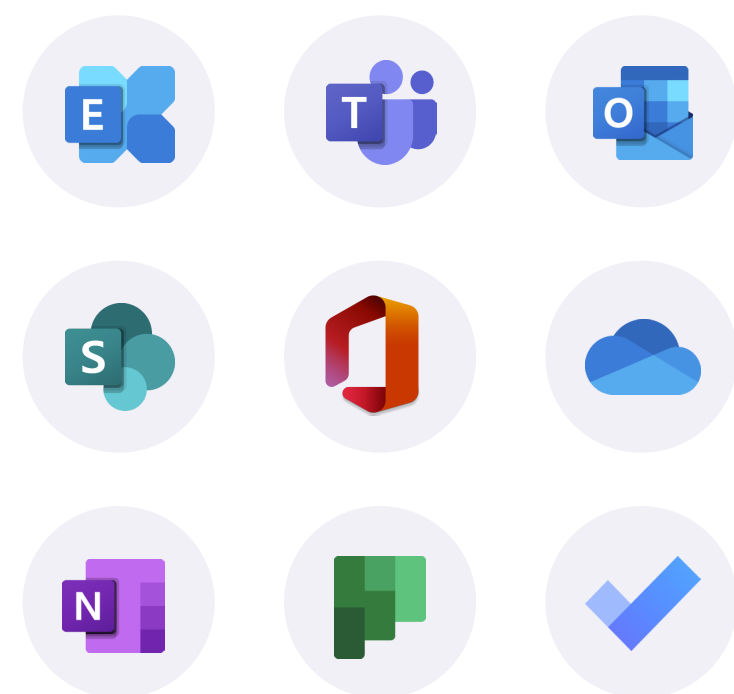


# Your workflow doesn't have to be this painful and complicated.



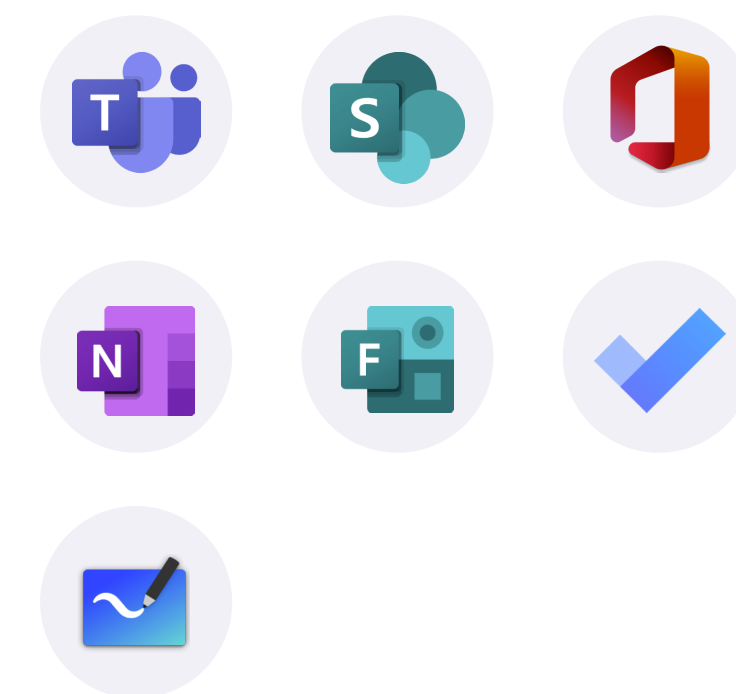
## 10 Apps Just to Prepare Agenda

Admins schedule via Calendar, post agenda in Teams, upload files in SharePoint, and collaborate on Office 365—to name a few steps in the workflow.



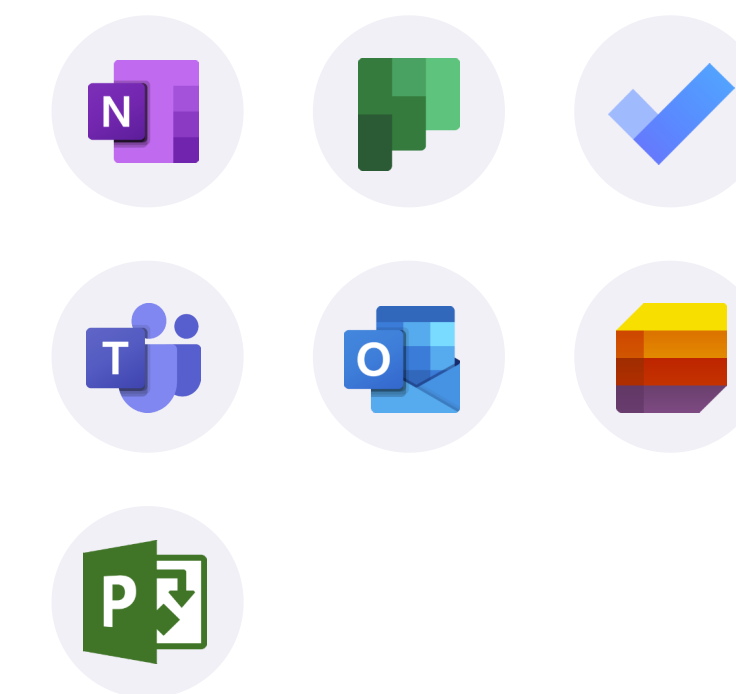
## Relying Only on Shared Screens

Relying on someone else's screen during video conferencing hinders directors from working at their own pace and managing their own notes and action items.



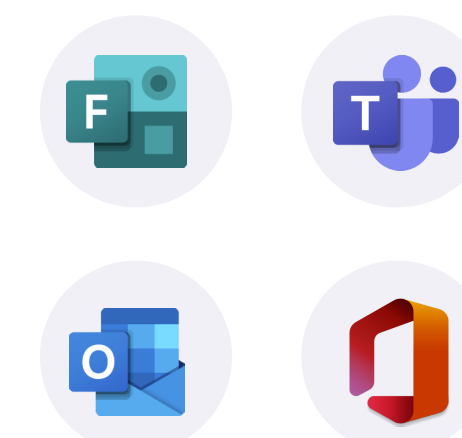
## Follow-Ups Done in Silos

Admins create meeting notes separately in OneNote, take down decision items, and manually follow up action items through Planner, To-Do, and Project.



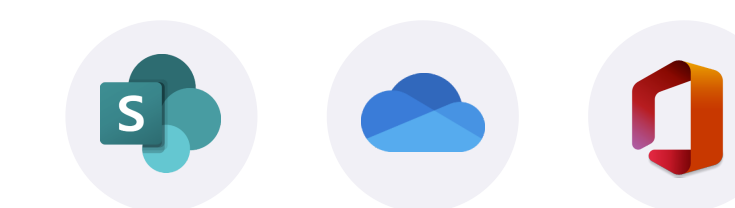
## Approvals All Over the Place

Admins may need to use MS Teams or Outlook to ask for signatures and approval. Directors then individually review the documents on Office 365.



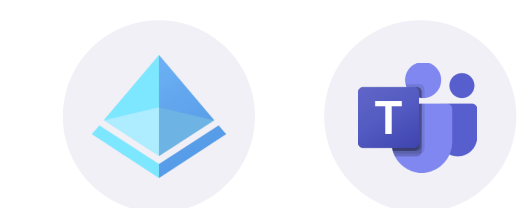
## Sharepoint Too Complex


Directors and admins are burdened with learning how SharePoint and its permission system work, when they have other important things to do.



## Limited Access for Guests

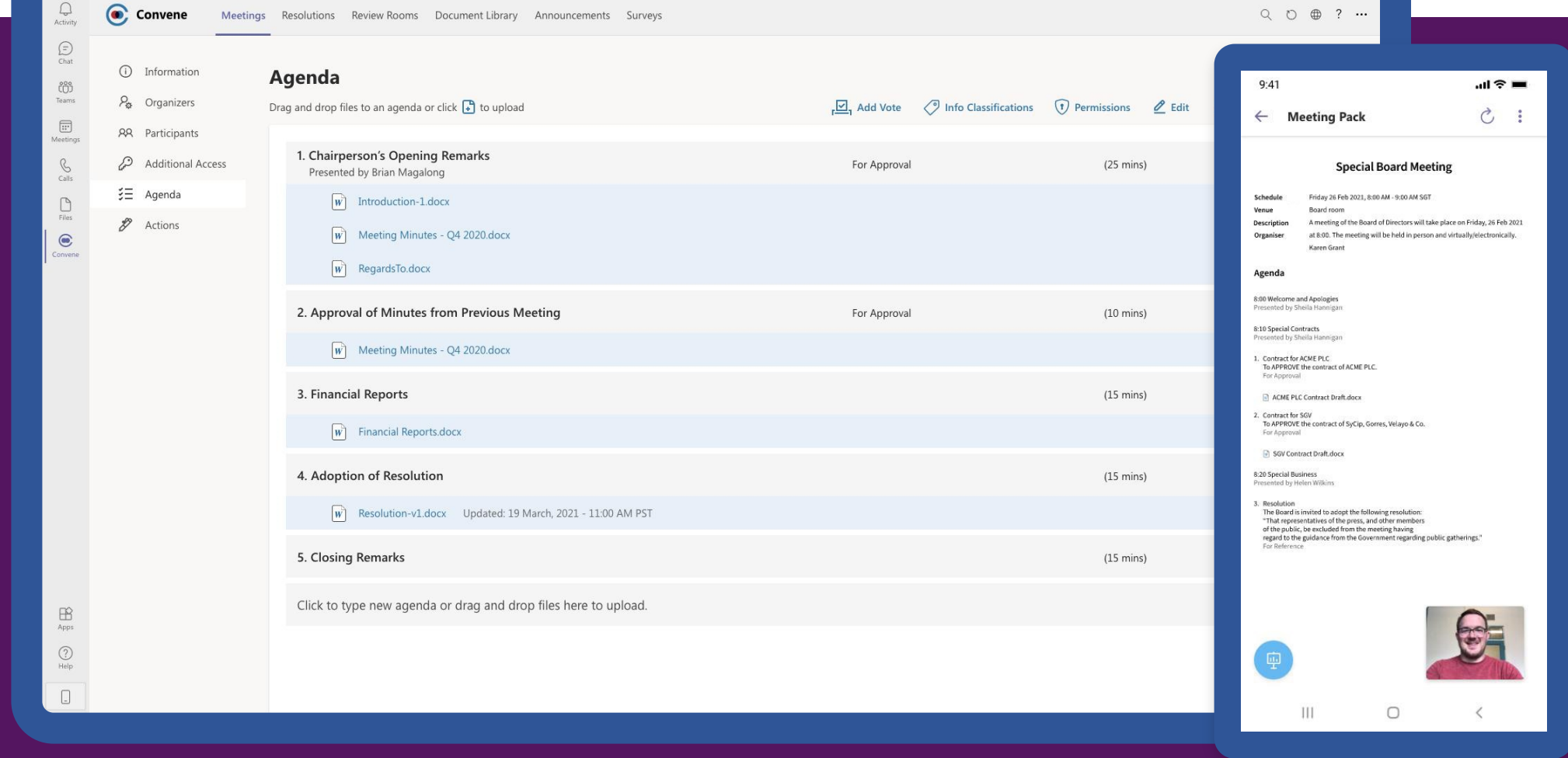
Guests can join video conferencing in Teams but have inflexible access to meeting information and documents.





# Less is More with CiT

You don't need 10+ apps to run better, more effective and regularised meetings.



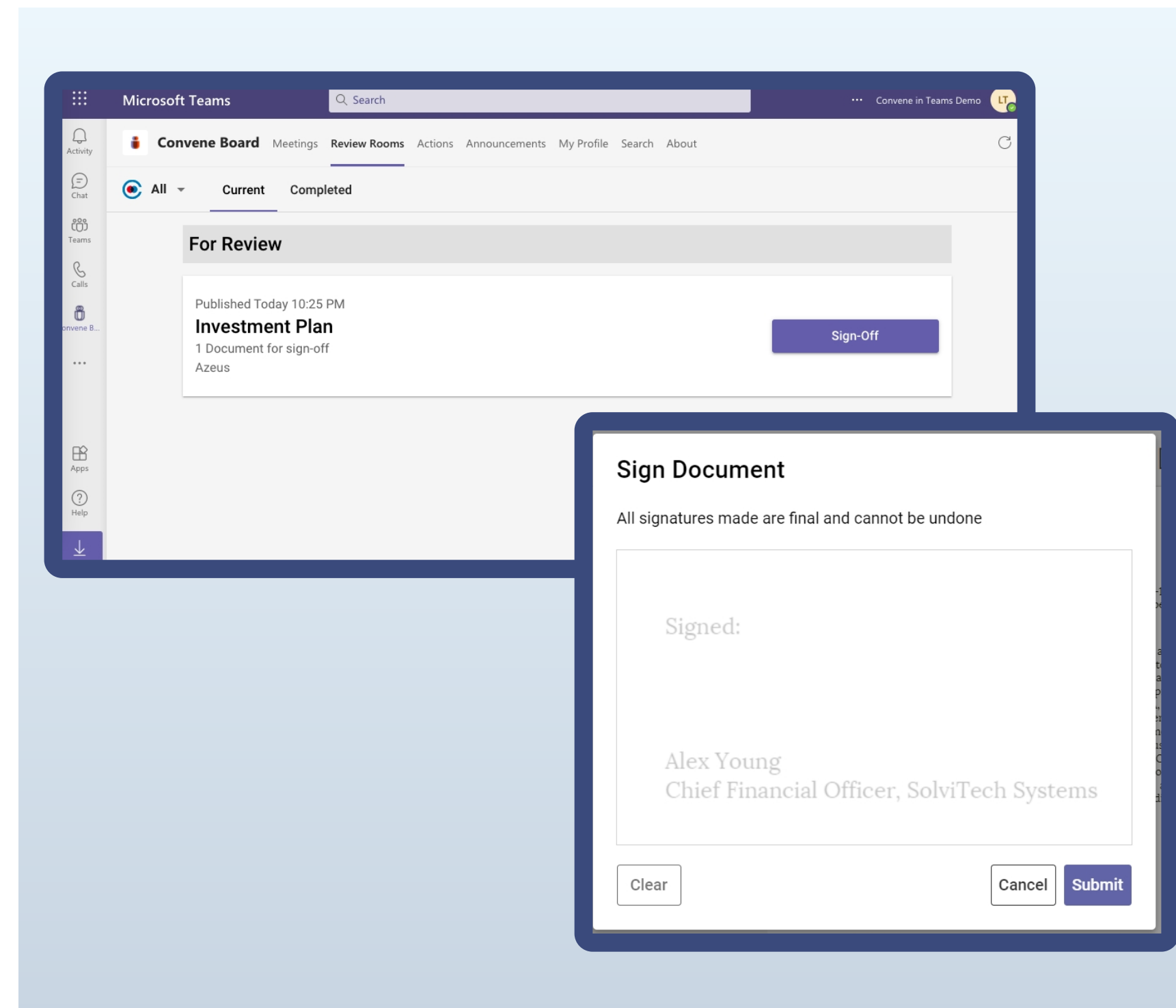
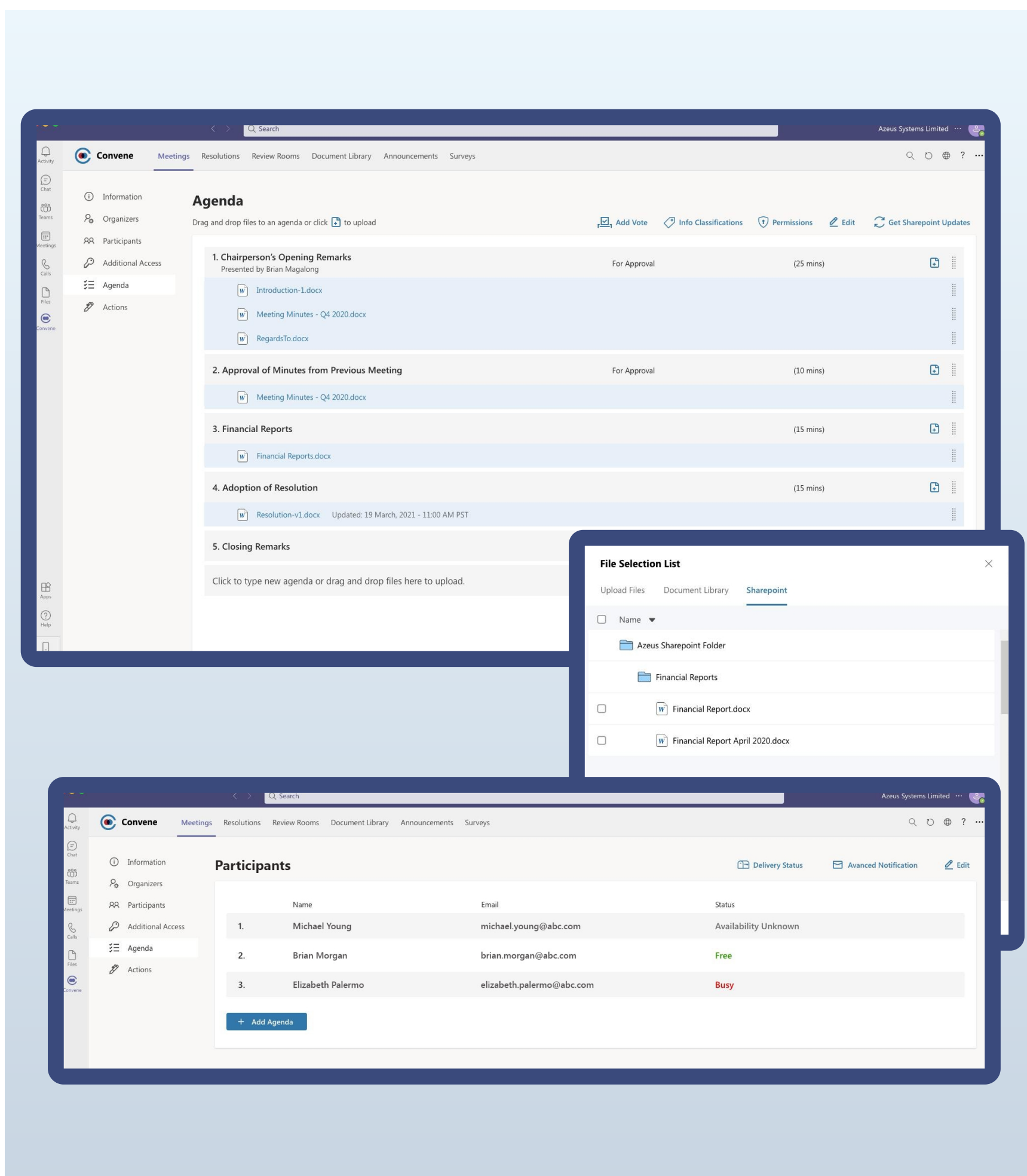
## Boost Productivity

**Create meeting packs in a few clicks.**

Administrators can easily set meetings, build the agenda, and publish meeting packs.

**Meet all your deadlines.**

Leaders are able to monitor action items to make sure they're accomplished on time.



## Drive Effectiveness

**Centralise all materials for faster decision-making.**

Administrators are able to put the resources all in one location, allowing for greater accessibility of materials necessary for decision-making.

**Collaborate during and beyond meetings.**

Meeting attendees can easily discuss via video calls, share notes, assign actions, and decide in real time all within the Teams platform.

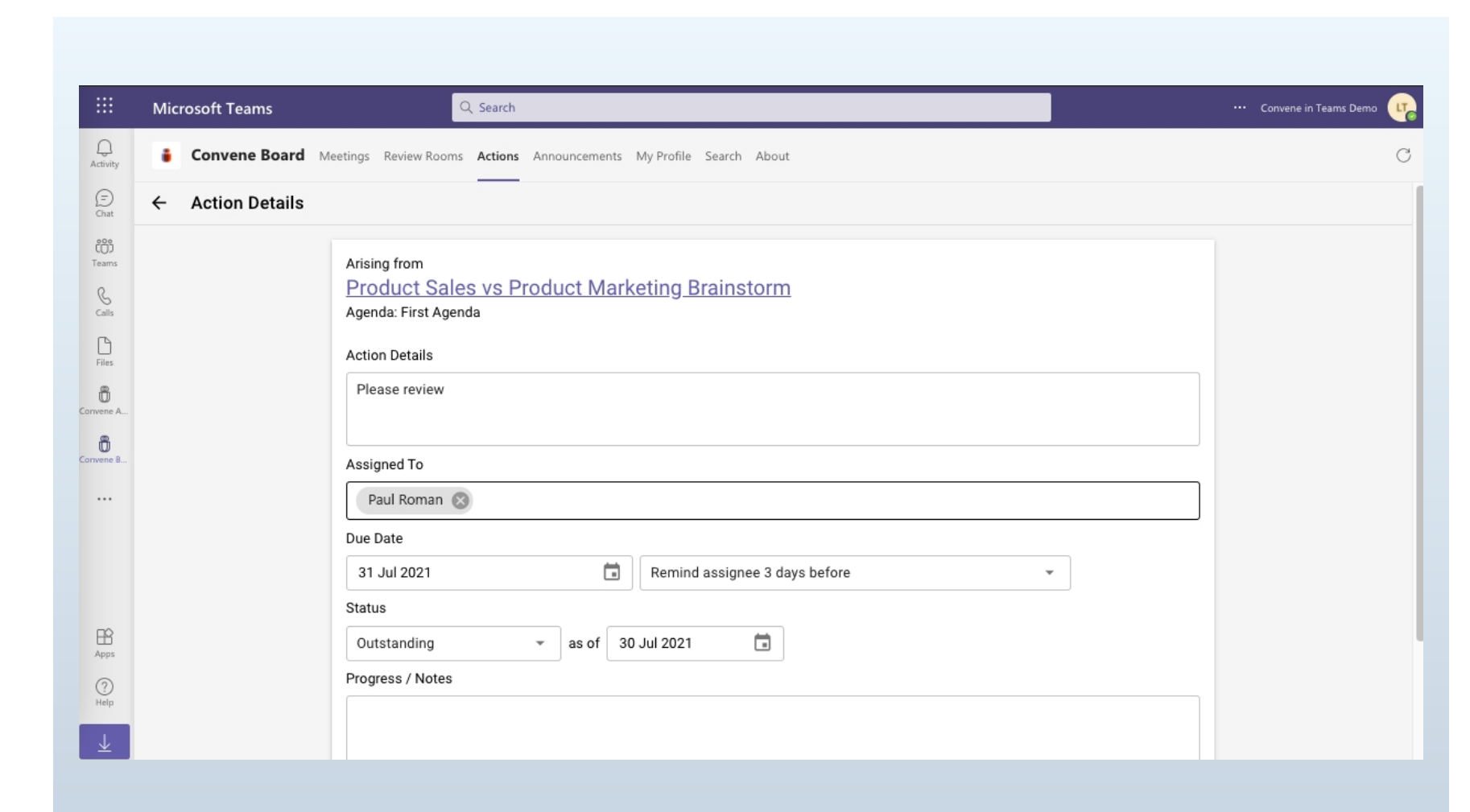
## Steer Compliance

**Maintain confidentiality of documents.**

Organisations can adhere to regulations as they implement top security measures. Administrators can ensure that documents remain confidential with fine-grained permission controls, along with end-to-end encryption, watermarking, and multi-factor authentication for extra layers of security.

**Stay on top of approvals, reviews, and assessments.**

Decision-makers can keep track of policy reviews and minutes approval, ensuring execution of action plans. No approvals will be overlooked.





# An Information Governance Champion

## All Meeting Details in One Place

Users can easily schedule the meeting, invite executives and guests, and create the meeting pack on one screen. Organisers can structure the agenda, upload and edit documents, and add vote items for the meeting.

## Seamless Meeting Discussions

Leaders can elevate decision-making by tracing the information flow during discussions. They can refer to annotations, approvals, and conversations made before, during, and after meetings.

## Action and Decision Follow-ups

Users can instantly publish minutes and track all action items and decisions that have transpired during the discussion. Organisers can set follow-up reminders to ensure action points are carried out.

## Streamlined Approval Workflows

Administrators can effectively manage board meeting minutes review and sign-off, approval of board resolutions in and out of meetings, and board performance assessments in one workspace.

## One Accessible Resource Center

Organisations are able to manage and store everything in one location. Administrators can modify access and set straightforward permission controls for executives.

## All-in-One Platform for Teams

Even with the collaborative nature of MS Teams, organisations actually still end up utilising up to 10 or more Microsoft applications throughout the meeting workflow. While it helps that all the tools are in the Microsoft space, it eventually becomes a hassle to learn and manage multiple applications from meeting preparation to the organisation of resources.

With CiT, all the MS Apps and meeting tools that you need can be accessed in one platform within Teams. Flexible software and service integrations are in place for organisations with existing Microsoft workflows, effectively simplifying the entire meeting cycle and eliminating the need for users to relearn the process.



### Account and Authentication

Administrators can instantly add Active Directory users. Once added, users will only have to sign in once using their Microsoft username and password.



### Document Creation and Repository

Users can easily edit documents in real time via Office Online. Organisations are able to connect to their own SharePoint repository, carrying over file encryption and access control.



### Calendar Management

RSVP responses from Mail and Calendar are automatically recorded in the system, instantly informing administrators regarding attendance. They are also made aware of the availability of Active Directory users, allowing for more efficient scheduling.





## Collaborate and Make Decisions in Real Time

Facilitate and lead discussions more effectively with video calls and additional collaborative tools to keep everyone engaged and focused in making decisions.

### Live Meeting Tools

Keep everybody on the same page with Presentation Controls such as Page Sync, Virtual Laser Pointer, and Live Annotations.

### Video Conferencing

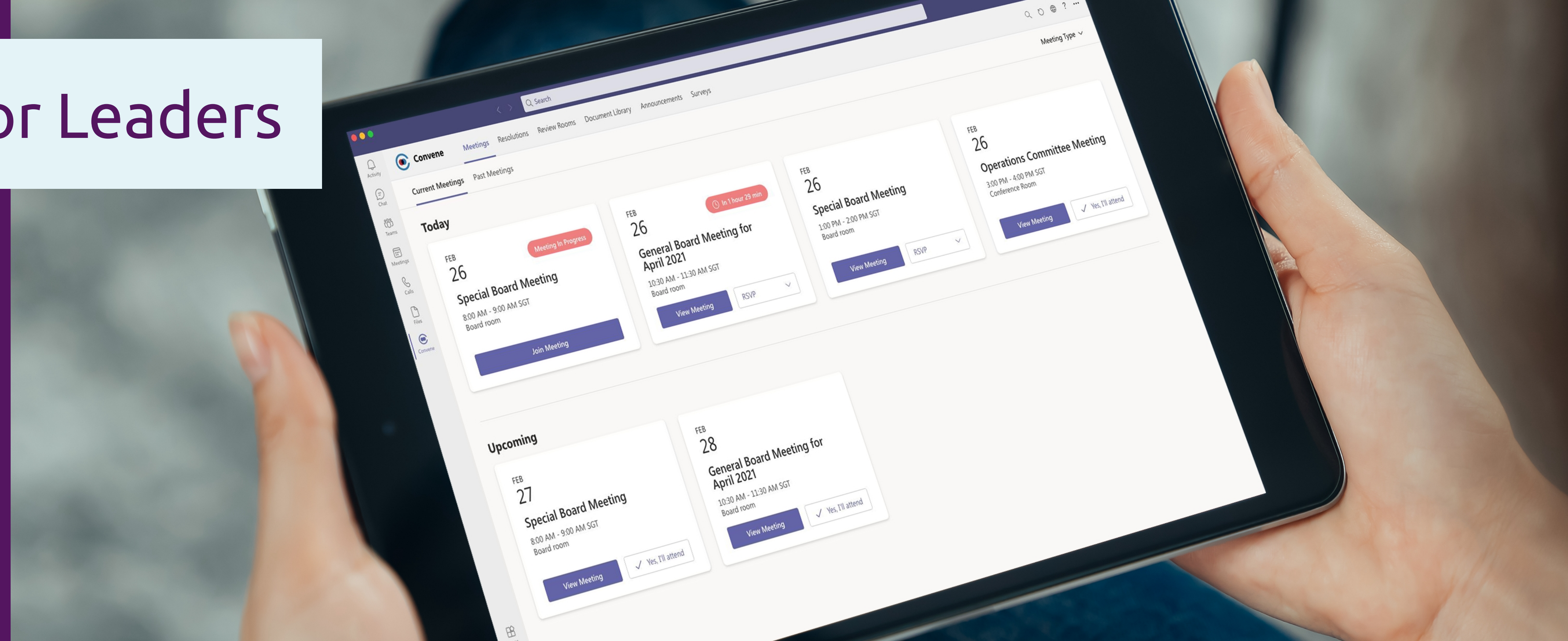
Engage in video calls and view meeting files on one screen. Follow the presentation without the need to rely on the shared screen.

### In-Meeting Voting

Vote on important matters in real time during the meeting. Export voting results for record-keeping purposes.

### Note-Taking and Action Creation

Take notes and assign actions during the meeting to ensure all tasks are accounted for. Set task deadlines and schedule reminders.



## Be on Top of Reviews, Approvals, and Surveys

Ensure that all pending items are addressed and accomplished on time. Receive reminders so that no document is overlooked.

### Real-Time Approvals

Approve and sign documents and view decision records during meetings in real time. Review documents anytime before or after meetings.

### Review Notifications

Get notifications regarding pending documents for review to be reminded accordingly.

### Surveys and Questionnaires

Easily view and respond to surveys and questionnaires anytime.



## Access Resources in One Place

Store and view all leadership resources in one platform. Be assured that only authorised parties are allowed to access the materials.

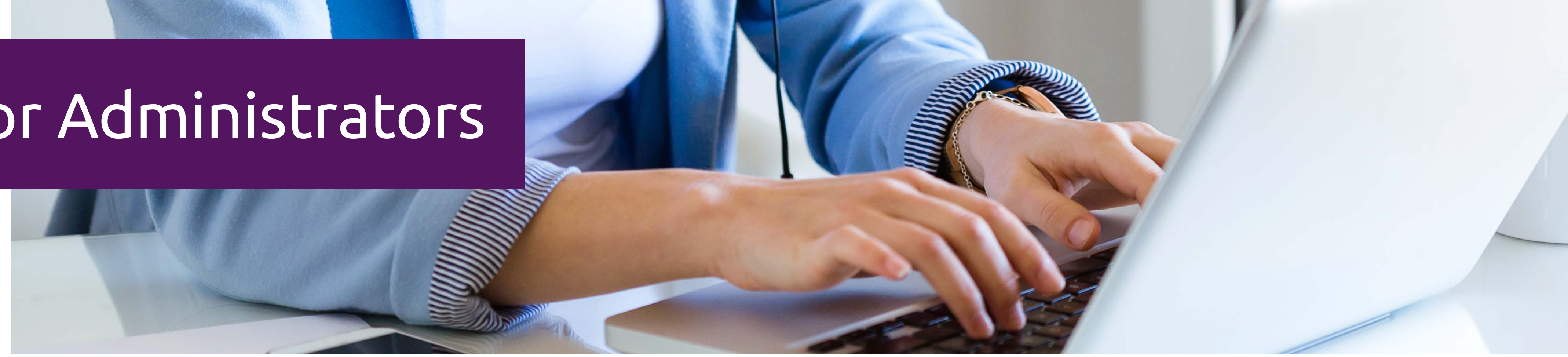
### Centralised Location

Eliminate the hassle of navigating through SharePoint. All SharePoint files can instantly be accessed in CiT.

### Search Capabilities

Easily find documents by simply searching for keywords.





## Organise Meetings Efficiently

Set up the meeting all in one screen — schedule the event, invite directors and guests, set meeting roles, and structure the agenda easily.

### Agenda Builder

Structure the agenda and upload related meeting files. Mark agenda as decision items to prompt voting in live meetings.

### Live Editing

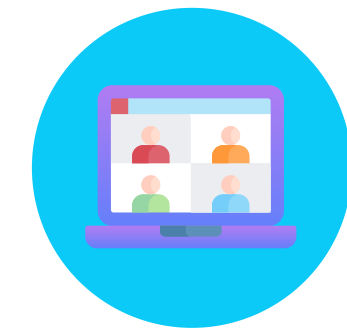
Edit and collaborate on meeting files in real time by linking the agenda to your Sharepoint files.

### Meeting Scheduler and Publisher

See all executives' schedule availability when inviting and include guests. Publish the agenda with one click and circulate it to attendees.

### Meeting Role Assignment

Assign meeting roles to your Active Directory users - make them the organiser, agenda contributor, or a regular participant.



## Manage Live Meetings

Oversee live meetings and ensure uninterrupted discussions among attendees. Document important points and actions in meetings through meeting minutes.

### Live Minute-Taking

Take live minutes during the actual meeting to make sure that no discussion points and tasks are missed.

### Minutes Template

Capture meeting discussions with a meeting minutes template that auto-records with actions and decisions made.

### Voting Workflow

Manage the entire voting process. Call for a vote within the meeting, end the voting period, and record the decision in real time.



## Follow up on Meeting Items

Streamline minutes circulation and action follow-up in one platform. Easily publish minutes, track action items and decisions points in a meeting.

### Minutes Distribution

Finalise meeting minutes and easily circulate to the attendees immediately after the meeting.

### Meeting Summary

Automatically send a meeting summary containing the important points made during the meeting.

### Action Tracker

Follow up and monitor progress on pending action items until they are accomplished.

### Alerts and Notifications

Send automated reminders to alert assignees on pending action items.





## Speed up Approval Workflows

Ask directors to review and sign off board meeting minutes, approve board resolutions in and out of meetings, and assess board performance all in a single workspace.

### Sign Off Methods

Send meeting minutes and contracts for review and approval to executives, allowing them to sign sequentially or in parallel.

### Status Tracking

Track review status and send alerts to remind executives.

### Board Assessments

Circulate surveys and questionnaires with tracking capabilities for board performance evaluations.



## Store Resources

Centralise all documents in one repository integrated with Sharepoint. Modify access and set permission controls easily within one platform.

### Access Controls

Define access controls more efficiently, controlling permissions at the agenda or document levels.

### Archive and Repository

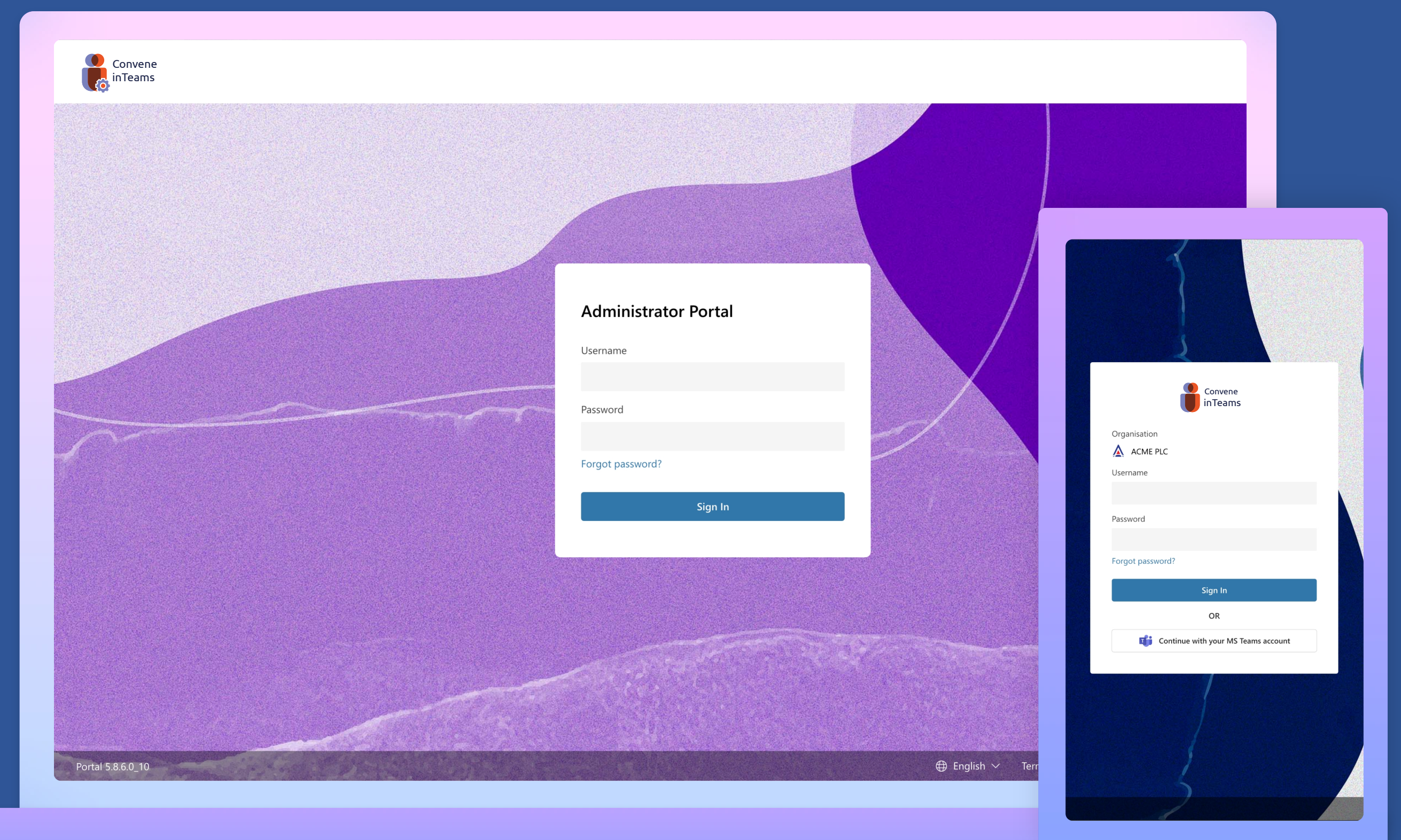
Access a searchable archive of all your meetings, minutes, and resolutions. SharePoint documents can also be accessed within the platform.

# CiT is the Microsoft solution built for your team in Teams.

Access an **all-in one integrated platform** where you can utilise everything you need in a single place in Teams.

Ensure **effective governance** by making full use of Teams capabilities and integrations, enabling enterprise leadership best practices throughout the meeting workflow.

Lead information governance **beyond meetings** with Convene's end-to-end features, such as Review Rooms, Resolutions, Authority, Surveys, and Audit Trail.





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## Accreditations

