
**From meeting
preparation to strategy
implementation:
Why Sherpany is a
priority for KENDRIS**



About **KENDRIS**

KENDRIS is an owner-managed Swiss firm providing family office, trust and fiduciary services, national and international tax and legal advice, accounting, outsourcing, and art management to its clients. The technology-based and digital business concept sets KENDRIS apart from the competition and guarantees clients future-oriented services. The company employs around 200 specialists in 4 countries.

For this case study, we asked Adrian Escher, Partner and Chairman of the Board of Directors, for a text on the use of Sherpany's Meeting Management Software.

If you want to learn more about KENDRIS, please visit this [website](#).

From meeting preparation to strategy implementation: Why Sherpany is a priority for KENDRIS

In today's business world, developing and implementing future-oriented strategies based on data is more important than ever before. Meeting processes play a central role here. In the best case, leaders use them to make important decisions and set the course for successful implementation of strategy.

Unfortunately, the reality often looks very different. Meetings are poorly prepared, pass by without important decisions being made, and projects are put into action slowly, or sometimes never at all. The executives of KENDRIS, an owner-managed Swiss company in the fiduciary sector, recognised these problems in their meetings.

Thanks to the introduction of Sherpany's meeting management software, they were able to significantly improve the preparation of their meetings, as well as the quality of the implementation of decisions made. Today, KENDRIS not only uses Sherpany for internal meetings, but also in cooperation with well-known international clients. We asked Adrian Escher, Partner and Chairman of the Board of Directors at KENDRIS, to explain the following:

- Common problems in the meeting process of leaders
- How Sherpany is used in everyday life at KENDRIS
- Why the introduction of a meeting management software should be a priority for others

'We have found that the **Sherpany** tool motivates meeting participants to improve the quality of their work and implement decisions more efficiently.'



Adrian Escher | Partner and Chairman of the Board of Directors at KENDRIS

1. Sherpany: What are the most common problems KENDRIS faced in the organisation of management meetings?

Adrian Escher: In the past, preparing for meetings involved a great deal of effort. Preparing the agenda, printing and distributing the documents, and adapting the agenda and meeting documents took a great deal of time. The distribution of the meeting documents was carried out via e-mail and by linking to the company's own intranet platform. However, this platform could not be accessed in offline mode, and only online using a PC or laptop, but not with an iPad or smartphone. Additional paper documents were often distributed during meetings. Preparing a meeting was therefore very complicated for most of the participants.

During the meeting there was often a lack of structure, and a lack of preparation as well as superficial discussions prevented well-founded decisions. A cumbersome preparation and approval process for meeting minutes, as well as a lack of an overview of the tasks to be completed and the progress of projects, made implementation even more difficult.

2. Sherpany: How is Sherpany used in everyday life at KENDRIS?

Adrian Escher: We use Sherpany for our regular management and board of directors meetings, as well as overarching strategy meetings. The members of the Board of Directors and the Executive Board have access to all the functions of the Sherpany meeting management software, including the continuously updated library with all the documents and evaluations relevant to decision-making.

Before the meeting

Sherpany's technology allows a high degree of thoroughness in the preparation for all participants. The documents for each item on the agenda are made available in good time via Sherpany. With Sherpany, it is now possible to browse the agenda and meeting documents conveniently, and offline. Adjustments and/or additions to individual agenda items can be made quickly and at any time. Uploading meeting documents is very simple and fast, as is uploading documents to the library.

Personal notes and comments to all meeting participants can be added to the documents during the preparation of the meeting. Waiting times during business trips are now transformed into preparation time, even in offline mode. If a document needs to be updated, this can be done efficiently and for all meeting participants by my assistant. Via iPad or laptop, I can keep track of all meetings at all times and use the search function to quickly find previous decisions and the corresponding documents.

During the meeting

Sherpany allows for structured meeting management and optimally supports both physical sessions and video conferences, or a combination of both. Due to significant improvements to meeting preparation, much more time can be invested in the discussion of agenda items. Because the meeting documents are assumed to be known, the time-consuming PowerPoint presentations of the past are no longer necessary. All of these gains in productivity lead to significantly more informed decisions and enhanced results from each meeting.

After the meeting

The follow-up of meetings, including the taking and approval of the minutes by electronic means, is carried out immediately and supports the implementation of the decisions made accordingly. In general, we have found that the Sherpany tool motivates meeting participants to improve the quality of their work and implement decisions more efficiently. Even a multi-phase strategy process involving planning, implementation, controlling, and optimisation becomes easier and more efficient thanks to Sherpany. Every meeting participant retains access to the documented decisions and objectives via their device of choice and is thus also able to follow the development of the critical performance indicators in his or her area of responsibility.

Document Management

We also use Sherpany in order to store our strategic roadmap, MIS (management information system) evaluations, and other supporting evaluations in the library in addition to important permanent files, such as regulations, allowing us to make these available to the members of the Board of Directors and to the management. The library allows a clear grouping and structuring of the documents using individual labels, making them easily searchable. Access to important, permanent files of the company is enabled by the library function. I use the private room to archive confidential documents that are not intended for all users. This makes it easier for me to work in Board committees such as our Audit and Compensation Committees.

Customer collaboration

In our active board mandates with customers, including international group companies, we use Sherpany whenever possible for the entire meeting process. The advantages of Sherpany become even more apparent in the case of large geographical distances with few meetings in person. During the time of Covid-19, efficient meeting management across different continents in conjunction with a video conference system no longer presents a challenge and will also become the new normal.

The increase in productivity achieved, especially in cases where face-to-face meetings with external board members or invited guests are held, is striking. In many cases, the duration of meetings can be reduced to a third of the time previously scheduled, while at the same time improving the quality of the meeting and its outcomes. Sherpany is also ideally suited for weekly calls, for example during a transaction phase, an intensive change management process, or during times of crisis in a company.

3. Sherpany: Why should it be a priority for any organisation to implement a meeting management software like Sherpany?

Adrian Escher: Time is money and every meeting counts. Therefore, every organisation should consider how to combine good corporate governance with efficient meeting management, and support decision-makers in secure, user-friendly, and effective collaboration.

For more information, contact us: info@sherpany.com | +41 44 515 89 50