



Diligent Boards

The **AI-powered** transaction readiness platform for private companies

Build investor-grade transaction readiness, without the complexity or overhead

As a private equity or venture backed company, you're expected to deliver business and financial reporting and governance — without the luxury of enterprise-level resources. Your lean team juggles investor demands, scattered data and mounting reporting needs, leaving gaps that can derail deals or slow your next strategic growth opportunity.

Diligent closes those gaps. Our AI-powered platform delivers transaction readiness, governance, and data room solutions that are built for speed, scale, security and simplicity. Keep your board updated, streamline decisions and be ready to seize strategic opportunities — without adding overhead.

4 ways Diligent helps you succeed

1. Simplify board and investor material creation

Accelerate fundraising, M&A, and investor engagement with AI-powered board and leadership tools that simplify board book creation, streamline pre-meeting preparation, and centralize investor materials securely. Cut timelines from weeks to hours — and stay focused on hitting your next growth milestone.

2. Drive superior performance with strategic insights

Equip board and leadership with a unified view of company financials with Netsuite Financial Reporting integrations to help you drive business performance — all in real time. Diligent delivers the intelligence needed to make fast, confident decisions and stay ahead of shifting market conditions.

Trusted by over

5,000+

CEO, CFOs and Legal Counsels of private high-growth companies



3. Power business defining moments

Drive deals and build investor trust with a secure virtual data room to streamline fundraising, investor onboarding, and financial reporting with confidence. Gain control and visibility over sensitive documents while ensuring compliance and seamless collaboration across investors, auditors and partners.

4. Build governance that grows with you

Build a governance foundation that matures with your business. From secure board communications to scalable workflows and best practice templates, Diligent supports IPO and exit readiness without overengineering — helping you impress investors with operational discipline from day one.



All the tools you need

★ Board & Leadership Meeting Management

Streamline agenda building, meeting logistics, and follow-up tasks in one secure platform — ensuring fast, compliant, and distraction-free board operations. Facilitate meetings securely and efficiently, integrating with tools like Office 365 and Google Drive.

★ Virtual Data Room

Share sensitive financials, contracts, and due diligence docs with investors or buyers using granular access controls, audit logs, and enterprise-grade encryption — no more version chaos or email risk.

★ AI Smart Book Builder

Automatically turn raw inputs (slides, reports, notes) into polished board decks or investor updates, and surface what matters most — saving hours of manual prep.

★ AI Legal Workflows

Auto-draft meeting minutes, scan documents for key terms, and prep legal materials faster with AI — reducing reliance on outside counsel and saving time for lean legal teams.

★ Questionnaires

Easily and securely collect information from your board and executives for investor disclosures, auditor confirmations, and conflicts of interest and related party compliance.

92%

Retention Rate for private companies



Quickly and easily perform board and executive evaluations and boards skills assessments using best practice templates.

★ AI Smart Summary & AI Smart Prep

Deliver personalized, AI-driven highlights of what matters most in board materials and investor materials — so busy leaders can focus on decisions for the business.

★ Financial Reporting with NetSuite

Eliminate manual exports and PowerPoint builds by pulling board-ready financials directly from NetSuite — ensuring speed, accuracy, and credibility in every report.

★ Approvals & Voting

Speed up time-sensitive decisions with centralized e-signatures, resolution tracking, and clear audit trails — ideal for deal-making, hiring or policy approvals.

★ Secure Messaging

Enable fast, focused communication between leadership and board members in a secure, compliant channel — no personal texts or scattered emails.

★ Education & Templates Library

Access governance templates, sample policies, and board education resources tailored for scaling companies — so you don't have to reinvent process from scratch.

Ready to streamline your governance & accelerate growth?

See how Diligent helps high-growth companies move faster, impress investors, and stay transaction readiness-ready at every stage.

[Request a demo ▶](#)