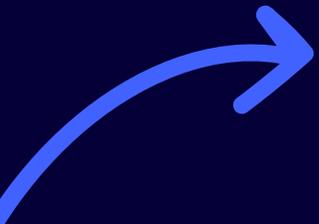


Online Collaborative
Whiteboards



A Buyer's Guide



miro.com



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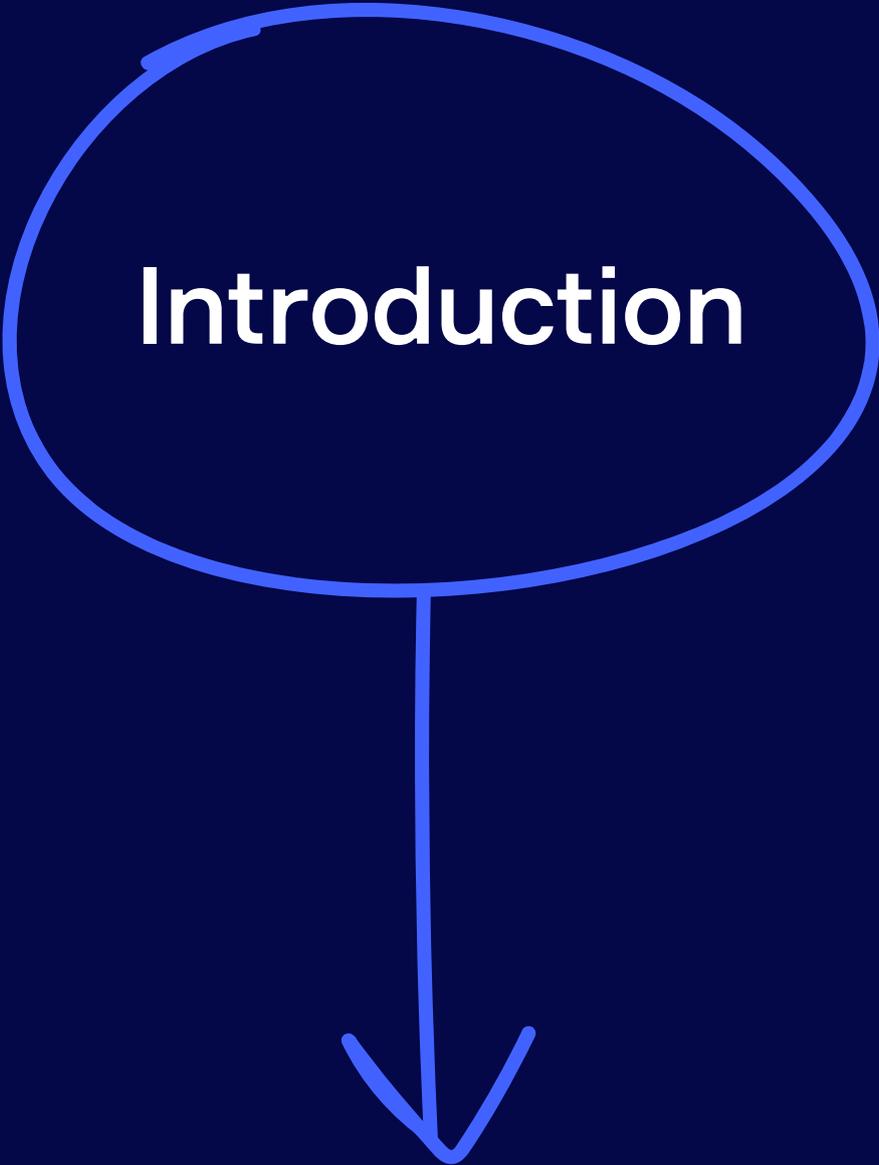
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Introduction

If the sudden rise of remote work accompanying the COVID-19 pandemic taught us one thing, it's that a company's ability to innovate can't be tied to its ability to work together in a physical space. The shift to working from home, and more recently, balancing remote and in-office workers, shows that teams require a shared space in the cloud to collaborate and feel connected. The key is to alleviate a range of hurdles that impact companies regardless of where employees are located — especially when it comes to challenges around alignment and co-creating. The online collaborative whiteboard has emerged as a powerful tool for solving these challenges, making it easy to share ideas and iterate quickly.

A look into work from home experience.

[Read article →](#)

Another modern challenge of distributed work is burnout. That's one of the reasons it is important to choose a solution that accommodates both synchronous (simultaneous/live) and asynchronous (independent/offline) work to support mental health and maintain productivity. Tools that promote this level of flexibility will continue to assert their position in the forward-looking company's tech stack.

What you'll find in this guide

IT teams, team leaders, and system administrators have a renewed responsibility to understand their team's needs, evaluate their tech stack, and provide solutions that help teams seamlessly engage cross-functionally.

This ebook is designed to help guide those evaluating online collaborative whiteboards by providing resources such as:

- Key questions to ask when defining your needs
- Top considerations to keep in mind when evaluating online whiteboard options
- Feature comparison with interactive matrix
- Vendor evaluation checklist

The ability to be agile, adaptable, and flexible is of utmost importance. Keeping your team's needs front and center as you seek the right tool to drive collaboration will set your company up for success in 2021 and beyond.

3 questions to define your needs and kickstart your evaluation



What problem are you solving?

Starting with the problem to solve or “job” that you’re looking to hire a vendor for helps you evaluate each vendor appropriately. The more specific you can be about your core use cases, the better you’ll be able to determine the best fit for your business.



What tools are you using today?

Identify what’s currently in your tech stack that a new tool would need to integrate with or replace. Are current tools helping your team be more productive or causing more work? What gaps do you see in capabilities required? If one tool has a groundswell of support, start there. There’s no better indicator of long-term success than a tool your team has already self-selected and adopted.



What stakeholders need to be involved in the decision?

Who will be using this type of tool? Who will the decision impact? Which aspects of the tool should each stakeholder or team evaluate? Make sure the right people are in the room so that you can garner support at early stages and ensure you are meeting the right needs.



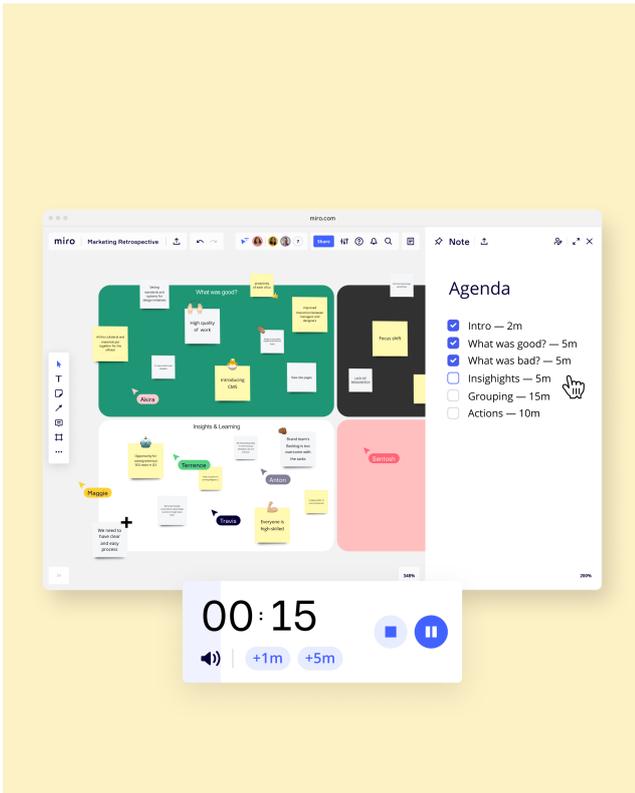
The value of online
collaborative whiteboards

The best online whiteboard will serve as a central collaboration hub, empowering your teams to connect and create like never before. This tool will seamlessly and securely integrate with the apps you already use on a daily basis (think: Asana, Jira, Zoom, etc.) and provide your teams with the templates and tools they need to accelerate the work they do every day. The result is a platform that makes it easy (and fun) to get creative and collaborate, and helps to alleviate the pain of an overloaded inbox and unmanageable number of instant messages and notifications.

What can an online whiteboard really be used for? The ability to sketch and add sticky notes to a virtual board is well and good, but what else can a tool like this do for your organization? Which teams will find value in it? An online collaborative whiteboard worth its salt will have a broad range of use cases that deliver value to your organization and connect all your teams — from development to product management to sales and all in one workspace.

What use cases to consider when evaluating your future online collaborative whiteboard:

- **Meetings and workshops**
- **Mapping and diagramming**
- **Strategy and planning**
- **Agile workflows**
- **Ideation and brainstorming**
- **UX and design thinking**

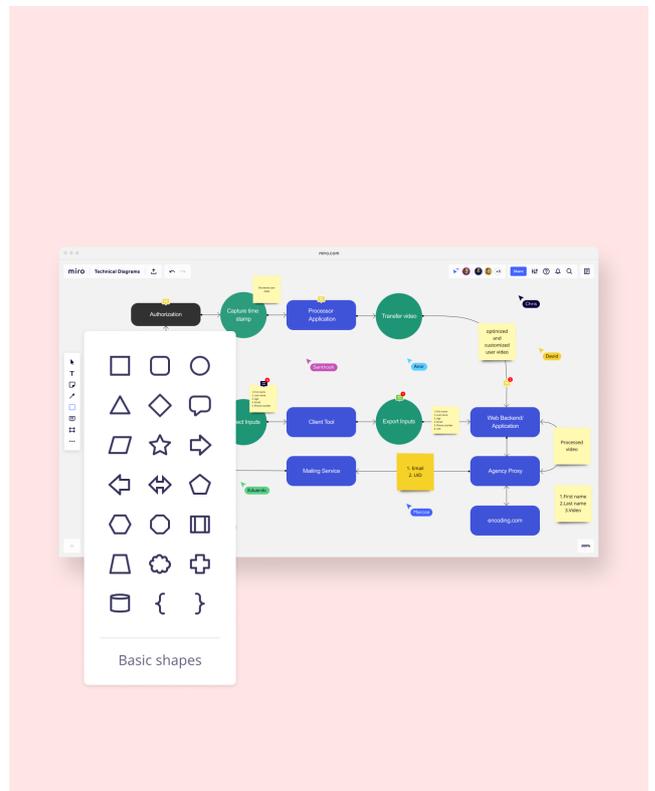


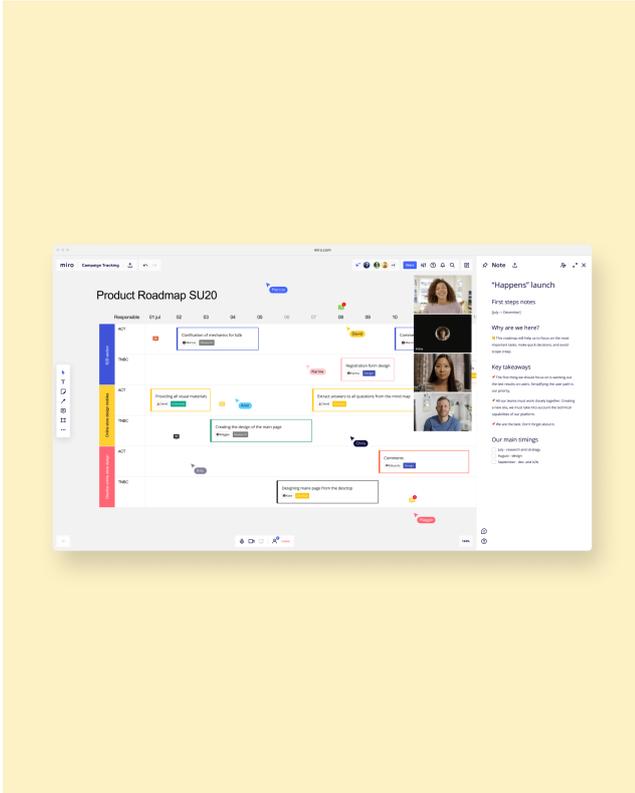
Meetings and workshops

1. Equip teams with the tools they need to engage and connect across locations
2. Run virtual events anywhere with no travel required, reducing costs
3. Improve efficiency by increasing organization-wide alignment across distributed teams

Mapping and diagramming

1. Ensure everyone is aligned on the vision for CX and UX with journey maps
2. Create a customer-centric culture and align teams with collaborative sessions
3. Align people, processes, and products with the best CX



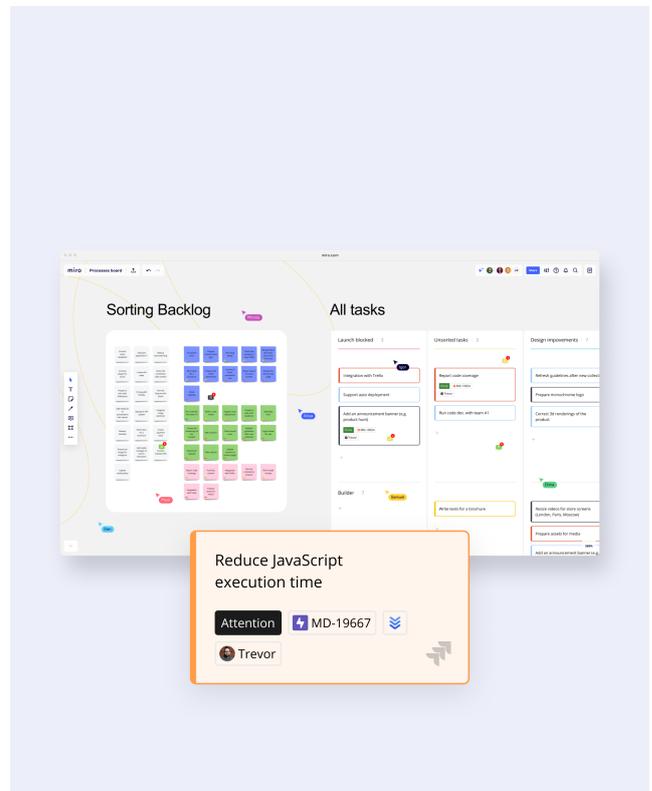


Strategy and planning

1. Enable remote teams to keep moving in the same direction with online project planning
2. Keep your finger on the pulse of cross-functional projects
3. Break down silos and align cross-functional teams with strategic organizational planning

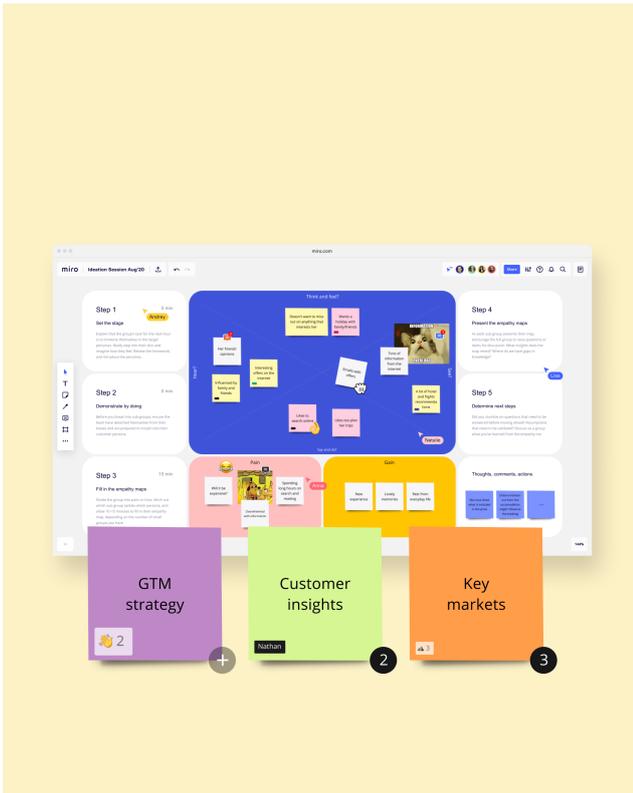
Agile workflows

1. Operate like a startup by helping even large teams coordinate and move quickly
2. Improve Agile processes with collaborative retros, sprint planning, and huddle boards
3. Enable smooth, Scaled Agile (SAFe®) processes with distributed PI planning



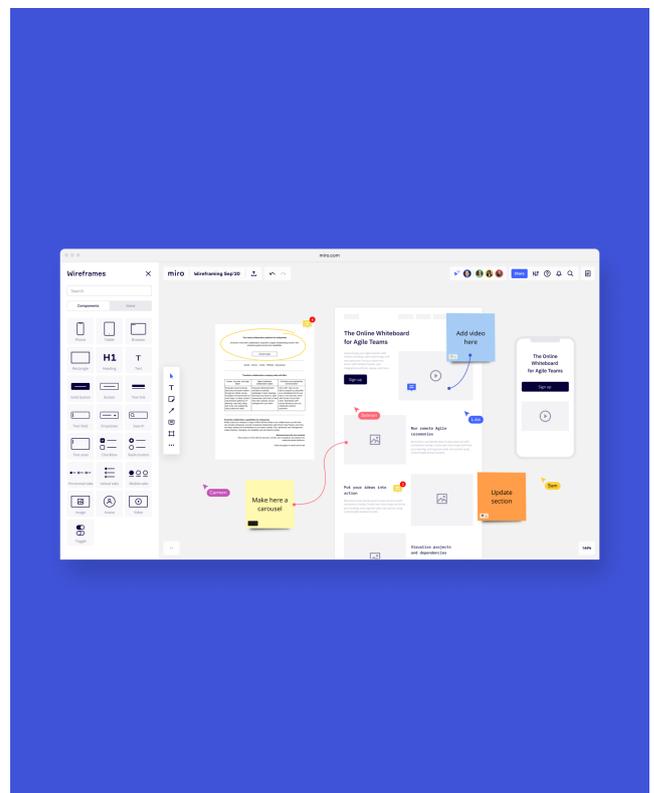
Ideation and brainstorming

1. Power the development of ideas with distributed teams as if you were in the same room
2. Boost creativity and speed on-site or online
3. Harness the full power of your organization's creativity, no matter where they are



UX and design thinking

1. Enable everything from hypothesis to designing together in one space
2. Create alignment with stakeholders, accelerating the speed of design and delivery
3. Support end-to-end design thinking process all in one place





Top product considerations

Product considerations:

01. Performance at scale
02. Integrations with your tech stack
03. User experience
04. Templates and breadth of use cases
05. Security and controls
06. Cross-device experience

Features and their functionality can vary greatly from one online collaborative whiteboard platform to another. One vendor's features may not be as robust as their competitors'. It's important to determine which features are most important to you and your team's primary use cases.

01. Performance at scale

Why you need it

The tool you purchase today should meet the needs of your team tomorrow. By design, whiteboard tools often support large-scale brainstorming and virtual events because of their ability to provide real-time interaction. That means they need to maintain fast performance even when hundreds of people use it at one time, allowing everyone to zoom and navigate without latency issues. And as your user base grows, you'll want rollout to be seamless so you can easily add multiple teams, workspaces, and users with minimal friction and appropriate permissions.

How to evaluate

Find out how many users can participate on the whiteboard simultaneously without performance issues. Look for vendors that offer flexibility in licensing so you can scale up usage on your own terms without getting locked into licensing costs you're not ready to commit to.



Look for scalability without constraints — you want to achieve platform stability. Make sure admins can manage accounts with granular permissions.

02. Integrations with your tech stack

Why you need it

Integrating seamlessly and securely with the apps your cross-functional teams already use brings them together into one workspace that's designed for every user and role. Important integrations to look for include project/task management, wireframing/prototyping, file storage, documentation, and communication (chat/video). Think about a collaborative online whiteboard as a potential hub for all your team's work.

How to evaluate

Look for tools that offer two-way syncing with the apps in your stack, and give you the ability to customize fields so you can work in your whiteboard without switching to another tool. Assess which tool will help you best achieve a “big picture” view of your organization's workflows.



Seek out integrations that can optimize the use of your current tools. Bonus: look for vendors with a developer platform (e.g. APIs, SDKs, etc.) indicating transparency and openness to partnership.

03. User experience

Why you need it

Users: High adoption is driven by intuitiveness and ease of use — even from the very first experience. It's important that the whiteboard tool makes work simpler and more centralized, helping to bridge in-person activities with digital processes.

Facilitators: Team leaders or facilitators need a robust set of tools to help them run engaging meetings and workshops that help give online experiences in-person energy, and empower all participants to have a voice.

How to evaluate it

Users: Look for features that make life easier like bulk sticky notes uploading, double-click to add, linking, and searchability.

Other core functions you'll want to pay attention to are diagramming tools and smart drawing capabilities.

Facilitators: An infinite canvas helps establish one unified workspace for all the pieces relating to a project, and the ability to zoom in to see granular details or zoom out to see the big picture.



See it in Miro:
[Sticky notes →](#)
[Mapping and diagramming →](#)



Prioritize intuitive board experience, robust facilitator tools, advanced sticky note functionality, and smart drawing capabilities.

04. Templates and breadth of use cases

Why you need it

A robust template library signals the breadth of use cases the tool can support, in effect helping to meet the needs of a wide range of different teams. Pre-built templates help slash the time required to prepare for meetings and planning sessions. And for leaders, custom templates establish best practices to help scale processes and ensure consistency across the organization.

How to evaluate

Pay attention to tools with interactive templates that have objects that snap into place. This will make activities like mind mapping, Kanban, or Agile ceremonies faster and easier. Ask about the ability to use multiple templates within a single board, which will be invaluable for cross-functional projects, workshops, or events that have multiple activities or objectives.



See it in Miro:
[Agile workflow templates](#) →



Takeaway:
An infinite amount of space that can host as many templates as you need will be key to meeting the needs for your most common use cases.

05. Security and controls

Why you need it

When it comes to company or client information, you need peace of mind that sensitive data is safe. A security breach or data loss can cause challenges you simply don't want to worry about. Not to mention interfere with deadlines and productivity.

How to evaluate

Look for enterprise-grade security, controls, and compliance capabilities. Admin features like domain control, allowlisting, audit logs, and custom sharing policies will help secure your company's data and content. Integrations with your core IT and security tool stack (e.g., Okta, BetterCloud, ServiceNow) to support SAML SSO, JIT, SCIM, and more will ensure you can scale usage seamlessly.



Takeaway:

Make sure sharing and security features are mature enough to meet your company's requirements in the longterm as usage scales.

06. Cross-device experience

Why you need it

Whether your team works remotely, in person, or a combination of both, you need access to real-time collaboration. Cross-device support allows you to seamlessly navigate and stay connected across all of your devices — from large monitors in conference rooms to tablets at home.

How to evaluate

Make sure the whiteboard tool is device agnostic and compatible with various interactive displays/touch screens, including stylus support and smart drawing capabilities. To marry the physical whiteboard experience with virtual collaboration, look for the ability to convert physical sticky notes into digital notes.



Look for collaboration capabilities that are device agnostic so you can work from anywhere — in real time or asynchronously.

Feature	✓
comparison matrix	

The feature comparison matrix can assist with your evaluation process by relating top considerations to product features. It also helps evaluators prioritize features and assess how well they relate to vendor offerings and your unique needs.

Interactive matrix preview:

 User experience <i>Is the tool intuitive and does it deliver a robust range of capabilities for users & facilitators?</i>	Miro	Vendor B	Vendor C		
<input type="radio"/> Real-time multi-user collaboration					
<input type="radio"/> Intuitive interface					
<input type="radio"/> Unlimited workspace and zoom capability					
<input type="radio"/> Bulk add sticky notes					
<input type="radio"/> Lock elements					
<input type="radio"/> Ability to easily duplicate board					
<input type="radio"/> Search function					
<input type="radio"/> Exportable content					
<input type="radio"/> Comment and mention					
<input type="radio"/> Drag and drop objects onto board					
<input type="radio"/> Library of icons/images					



miro.com/miroverse/feature-comparison-matrix/

[Click here](#) to access the interactive matrix template or use the printable version in the appendix to conduct your evaluation.

Vendor evaluation checklist



While online collaborative whiteboards are simple in concept, not all products are built with the same audience, use case, or focus in mind. This means the company you partner with should be part of your evaluation just as much as your product requirements.

Use our vendor evaluation checklist to guide your initial discovery phase. Asking each vendor these suggested questions will help you to determine how aligned they are with your goals, their vision for the product, and how qualified they might be to suit your team’s needs.

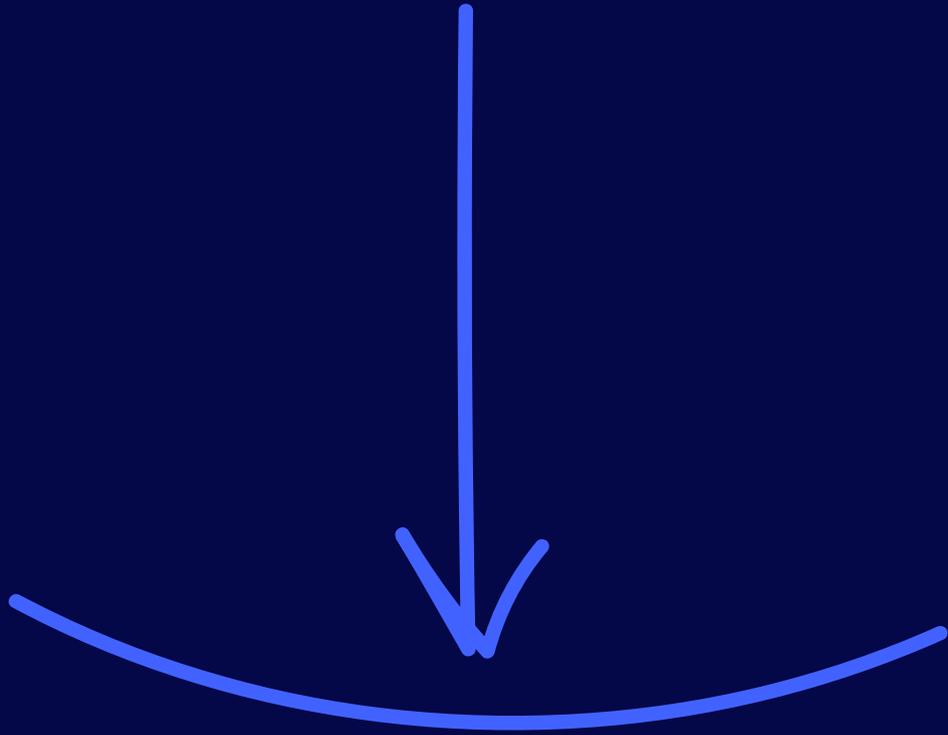
Interactive checklist preview:

1	How closely does their customer base resemble your company and team? Tip: check G2 Crowd to see distribution of reviews by company size and industry.	Vendor A: ■ great ratings	<input type="radio"/>	Icon bank ✓ copy + paste
		Vendor B:	<input type="radio"/>	
		Vendor C: ■ need more research	<input type="radio"/>	
2	How satisfied are their customers? Tip: check peer review sites such as G2 Crowd , Capterra , or Software Advice . Want deeper insights? Ask to speak to references.	Vendor A: ■	<input checked="" type="radio"/>	Icon bank ✓ copy + paste
		Vendor B: ■	<input type="radio"/>	
		Vendor C:	<input checked="" type="radio"/>	
3	What is their position in the market? • Are they able to scale to meet your needs? • Who makes up their leadership team? • Are they profitable and cash flow positive?	Vendor A:	<input type="radio"/>	Icon bank ✓ copy + paste
		Vendor B:	<input type="radio"/>	
		Vendor C: ■	<input type="radio"/>	
4	How often are releases happening? What type of features are being shipped? Tip: check out the product community to see product updates, user feedback, and requests.	Vendor A: ■	<input type="radio"/>	Icon bank ✓ copy + paste
		Vendor B: ■	<input checked="" type="radio"/>	
		Vendor C:	<input type="radio"/>	
	What support does the vendor provide?	Vendor A:	<input type="radio"/>	Icon bank ✓ copy + paste

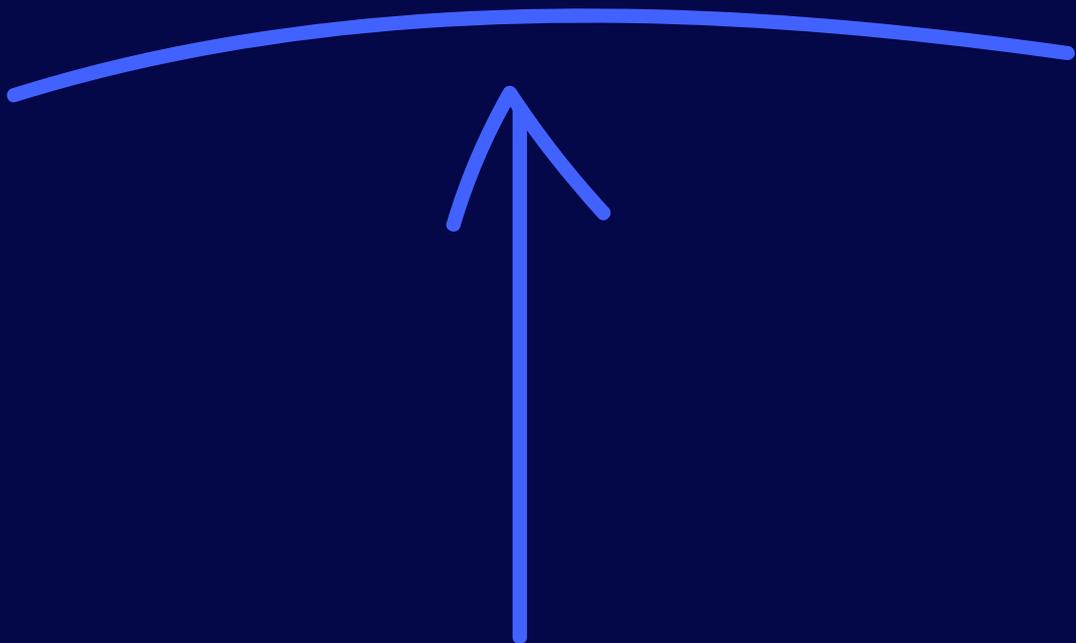


miro.com/miroverse/vendor-evaluation-checklist/

[Click here](#) to access the interactive vendor evaluation checklist or print the questionnaire in the appendix.



**How it fits into
your tech stack**



As you've learned, integrating a whiteboard platform into the applications you already use is critical for adoption and productivity. But most importantly, the best kinds of online whiteboards can act as true collaborative hubs for teamwork that connect all the different people, projects, and tools across your organization — democratizing information at any level, and giving visibility into the big picture of your team's work. That includes everything from a 1,000-ft view for an executive to see how a project is progressing, down to the tiniest details for a developer or designer — from the related Asana task to the Figma wireframe. Imagine the possibilities: the right whiteboard tool can be at the center of your tech stack, securely linking all the different pieces of your projects in one homebase.

The tools you have

How a collaborative whiteboard levels them up



About Miro



With Miro, you can connect your entire company in one platform for faster project delivery times, increased team alignment, and less time spent in meetings.

Winning teams choose Miro:

We surveyed over 1,200 Miro Enterprise customers, and 98% would recommend Miro to their colleagues.

What to know more about what our customers think?

[Read our reviews on G2 Crowd](#) →

“It's not just one collaboration tool that just stands alone by itself — you need to take a look at the integrations with other tools and make sure it works well together. Miro fit the bill on all aspects and we went with Miro and never looked back.”



Chon Intakeha,
PMO, Business Technology at Guidewire

“You can have multiple people iterating at any particular time. And I think that that's an incredibly valuable piece of the process.”



Myra Freilich,
Associate Director, Technology at FINRA

“We've onboarded dozens of people onto the platform with very few hiccups. The learning curve is smooth and the functionality predictable (we often say, 'if you think you can do it, you probably can!')”



Jason K, Director,
Innovation at Newell Brands ([G2 review](#))

Ready to find out if Miro is the right whiteboard platform for you?

[Contact us](#)
miro.com/contact/sales

Trusted by 95% of the Fortune 100



Proud to be a leader on G2



Appendix

Feature comparison matrix

Performance at scale. Can you manage and add as many users as needed without slowing down the experience?	Vendor A	Vendor B	Vendor C
Unlimited multi-team workspaces			
Flexible licensing options			
Supports 100+ participants at one time			
Able to invite multiple users			
Range of user roles/permissions			

Integrations with tech stack. Can you seamlessly connect to the tools your team already uses today?	Vendor A	Vendor B	Vendor C
Developer platform (e.g., API, SDK)			
Embeddable using iFrames or native integrations			
App integrations:			
Airtable			
Asana			
Azure DevOps			

Feature comparison matrix

Box			
Confluence			
Dropbox			
G Suite (Google Workplace)			
GitHub			
InVision			
MS Teams			
MS One Drive			
MS 365			
Sketch			
Slack			

Security and controls. Are you confident that you can adhere to your company's required security protocols?	Vendor A	Vendor B	Vendor C
SOC-2 and GDPR compliant			
Domain control			

Feature comparison matrix

Configurable sharing policies			
Domain allowlisting			
Audit logs			
Integration/app management			
Advanced user management			
Single sign-on (SSO)			
User provisioning & deprovisioning (SCIM)			
Automated access and license requests			
Data governance add-ons (support data segregation, custom encryption key management, data backup zones)			

User experience. Is the tool intuitive and does it deliver a robust range of capabilities for users & facilitators?	Vendor A	Vendor B	Vendor C
Real-time multi-user collaboration			
Intuitive interface			
Unlimited workspace and zoom capability			
Bulk add sticky notes			

Feature comparison matrix

Lock elements			
Ability to easily duplicate board			
Search function			
Exportable content			
Comment and mention			
Drag and drop objects onto board			
Library of icons/images			
Facilitator tools			
Summon users on the board			
Hide/reveal sections of board			
Activity history/log by user			
Voting			

Templates & breadth of use cases. Will you have a wide range of pre-built templates or the ability to create custom templates?	Vendor A	Vendor B	Vendor C
Custom template capabilities			

Vendor evaluation checklist

Diagrams and flows			
Workshop facilitation			
Prototyping			
Kanban / task management			
Interactive presentations			
Mind mapping			
Wireframing			
Agile workflows and activities			
Brainstorming and ideation			

Cross-device experience. Will your teams be able to easily use the tool whether in an office or a remote location?	Miro	Vendor B	Vendor C
Stickies capture (convert physical notes to digital)			
Smart draw (freehand to shape)			
Compatible with modern browsers			
Native mobile app			
Desktop app			

Vendor evaluation checklist

Feature	Vendor		✓
<p>How closely does their customer base resemble your company and team?</p> <p>Tip: check G2 Crowd to see distribution of reviews by company size and industry.</p>	Vendor A:		
	Vendor B:		
	Vendor C:		
<p>How satisfied are their customers?</p> <p>Tip: check peer review sites such as G2 Crowd, Capterra, or Software Advice.</p> <p>Want deeper insights? Ask to speak to references.</p>	Vendor A:		
	Vendor B:		
	Vendor C:		

Vendor evaluation checklist

<p>What is their position in the market?</p> <ul style="list-style-type: none"> • Are they able to scale to meet your needs? • Who makes up their leadership team? 	Vendor A:		
	Vendor B:		
	Vendor C:		
<p>How often are releases happening?</p> <p>What type of features are being shipped?</p> <p>Tip: check out the product community and changelog to see product updates, user feedback, and requests.</p>	Vendor A:		
	Vendor B:		
	Vendor C:		

Vendor evaluation checklist

<p>What support does the vendor provide?</p> <ul style="list-style-type: none"> • Do they offer hands-on onboarding? • A dedicated Customer Success manager? • Will they allow you to run a pilot to test the software before buying? 	Vendor A:		
	Vendor B:		
	Vendor C:		
<p>What security measures have been taken?</p> <ul style="list-style-type: none"> • Are they GDPR compliant? • How granular are the administration settings? 	Vendor A:		
	Vendor B:		
	Vendor C:		

<p>What is the cross-device experience?</p> <ul style="list-style-type: none"> • What operating systems are supported? • What is the mobile application's parity with desktop/web version? 	Vendor A:		
	Vendor B:		
	Vendor C:		