

Online Collaborative
Whiteboards

A Buyer's Guide

For design teams



miro.com

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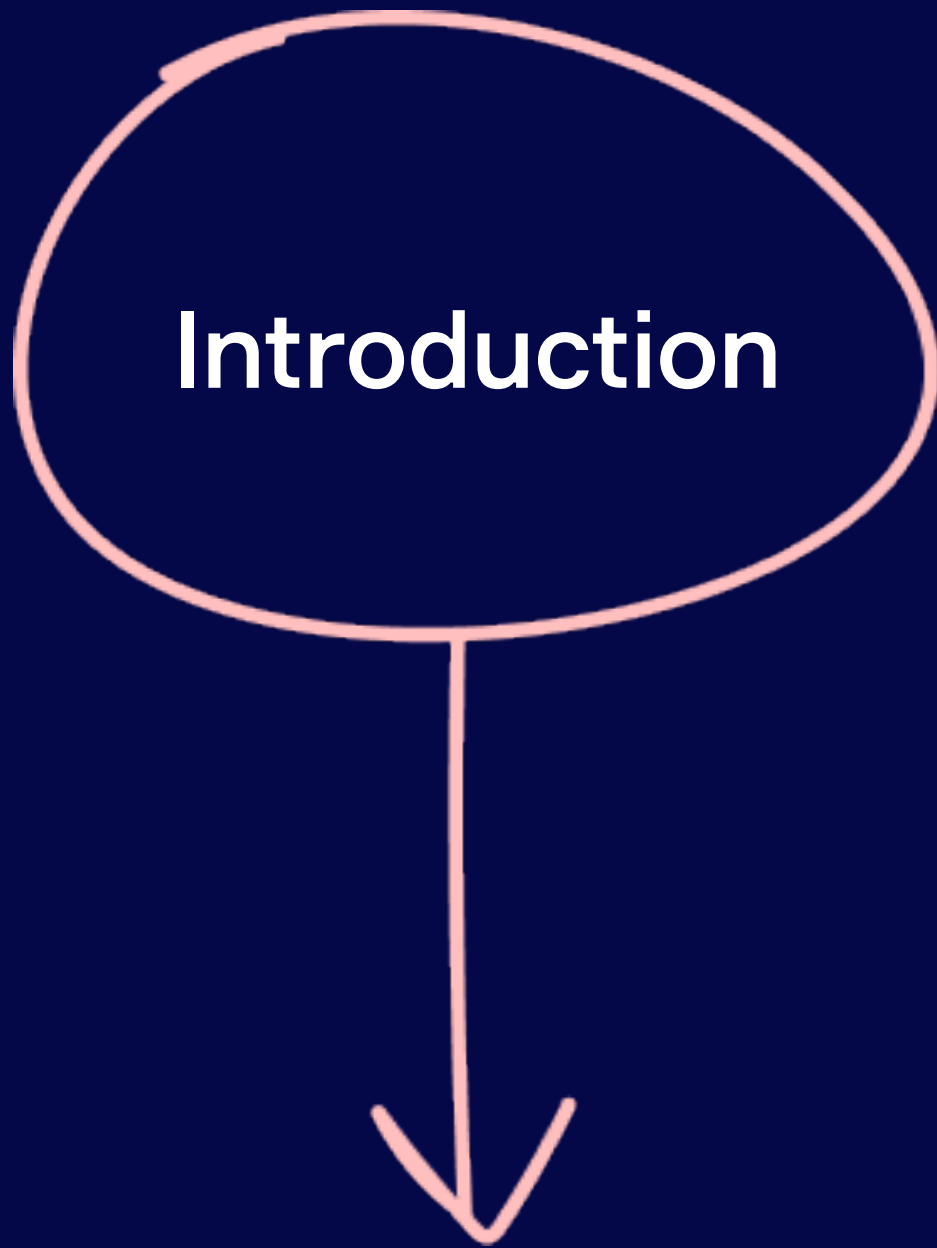
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Introduction

Creating amazing customer experiences has never been an easy task, but now more than ever design teams need to get it right. With so many software products available on the market for customers to choose from, gaining and retaining customers requires thoughtfully crafting products that satisfy their needs, solve their problems, and are consistently enjoyable to use.

How are you navigating the future of work?

[Check out our Hybrid Collaboration Field Guide →](#)

The era of hybrid work presents new, nuanced challenges for remote and distributed teams. In order to ensure that great designs are shipped to market, design teams must work closely with cross-functional stakeholders and act as an internal advocate on behalf of the customer. They must leverage the diverse perspectives, ideas, and insights of the collective to innovate and win the market.

There are three key challenges that design teams need to address in order to succeed in today's hybrid environment:

1. How to make remote or hybrid meetings and workshops as engaging as in-person experiences to maintain trust, creativity, and momentum
2. How to include cross-functional stakeholders into the design process in a real way to ensure diverse perspectives are heard and the broader organization is aligned on decisions
3. How to evangelize design thinking and advocate for the voice of the customer in spite of cross-functional silos

What you'll find in this guide

Design leaders have a renewed responsibility to understand the needs of their teams and cross-functional stakeholders, evaluate the tech stack, and provide solutions that ensure seamless collaboration throughout the design process.

This ebook is designed to help guide design leaders in 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 for your design workflows
- 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 design team up for success in 2022 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.

Three curved, light-orange arrows are positioned around the text. One arrow starts from the top right and points down towards the text. Two other arrows start from the bottom left and bottom right, both pointing up towards the text. The arrows are thick and have a hand-drawn, sketchy appearance.

The value of collaborative
online whiteboards

The best online whiteboard will serve as a central collaboration hub for your design process, empowering your team to connect and create like never before. This tool will be easy to use for teammates across disciplines (even non-design collaborators), seamlessly and securely integrate with the apps you already use on a daily basis (think: Figma, Sketch, Adobe XD, etc.), and cover a broad set of use cases to reduce the number of tools and simplify your design process. The result is a platform that makes it easy — and fun — to get creative and collaborate, and helps to alleviate the pain of working in a disjointed process with disengaged stakeholders.

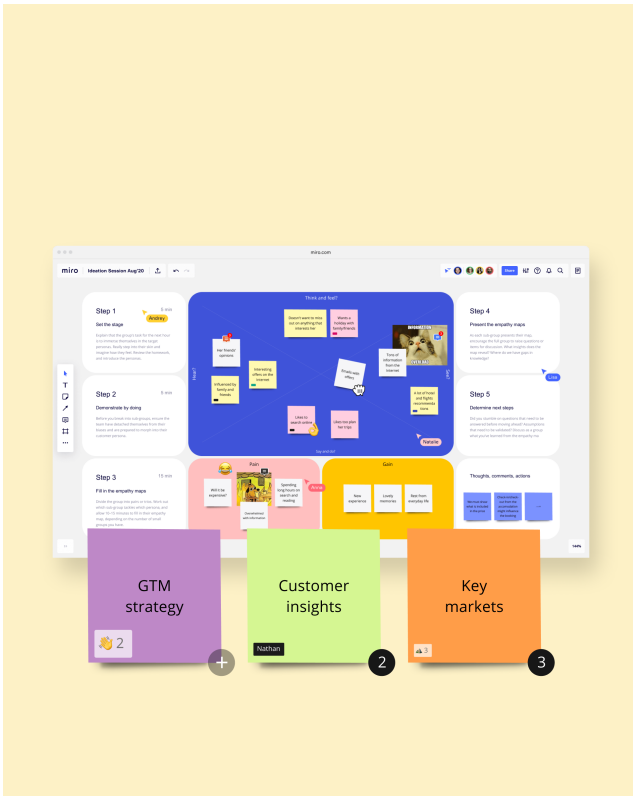
What can an online whiteboard really be used for? The ability to sketch and add sticky notes to a virtual board is well and good, but what else can a tool like this do for your design team? An online collaborative whiteboard worth its salt will have a broad range of use cases that support the key workflows and business outcomes your team is accountable to — from research to ideation to hand-off — and all in one workspace.

A good collaborative whiteboard will enable work continuously throughout the design process and support key workflows:

- **Compiling and synthesizing user research**
- **Building customer journeys and user flows**
- **Facilitating workshops, meetings, and design sprints**
- **Collaborating through iteration and managing feedback**

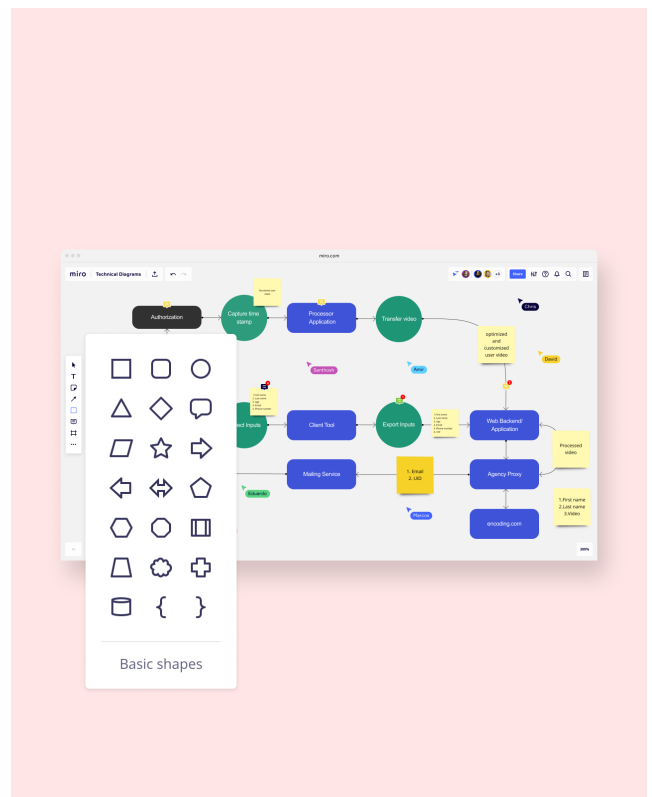
User research

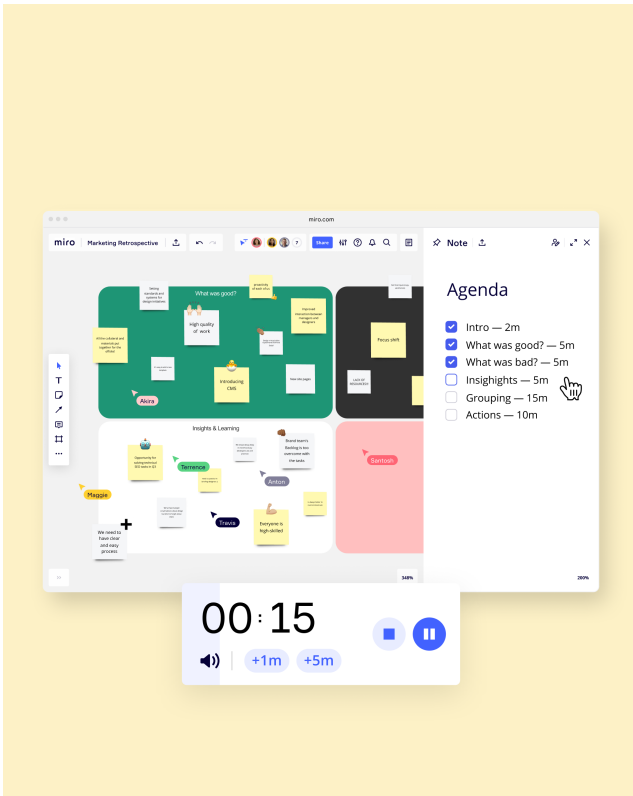
1. Create a single repository for PDFs, slides, images, videos, notes, and more.
2. Synthesize qualitative data from surveys, interviews, and user tests with clustering.
3. Build empathy maps, personas, and presentations to make your insights easy to understand and share.



Customer journeys and user flows

1. Use the infinite canvas to build a complete view of the holistic user experience.
2. Break down silos and improve visibility at team hand-off points to improve design continuity.
3. Bring the customer perspective to technical discussions to improve team empathy.



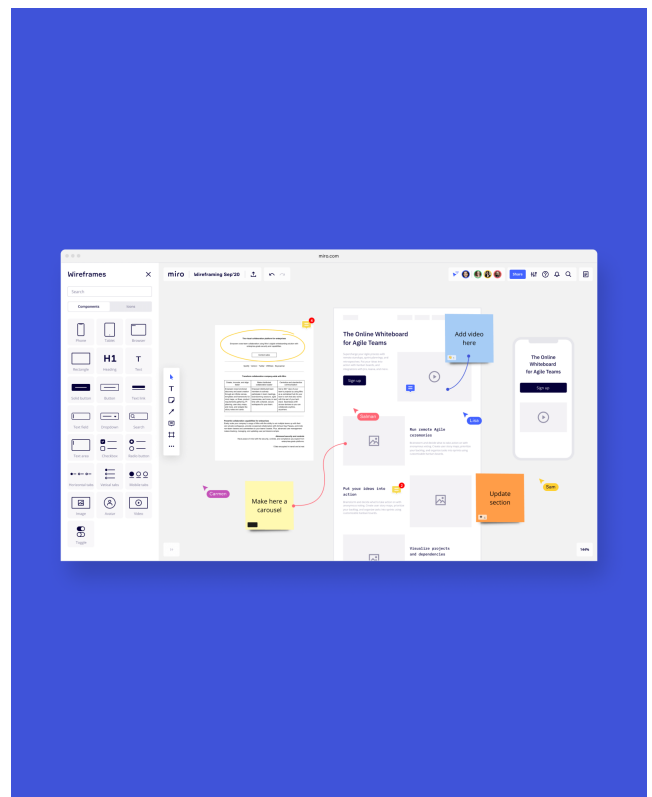


Workshops, meetings, and design sprints

1. Facilitate inclusive, engaging sessions for all participants whether remote, in person, or hybrid.
2. Generate hundreds of ideas in minutes and create momentum and excitement.
3. Automatically retain a digital copy of the entire session on your board, no manual transcribing.

Iteration and feedback management

1. Quickly wireframe concepts from brainstorms to use in design discussions.
2. Compare multiple versions side by side or visually audit multiple assets for consistency.
3. Conduct design reviews or capture and retain feedback asynchronously with contextual commenting.





Top product considerations

Top 4 product considerations for design teams

Features and their functionality can vary greatly from one online collaborative whiteboard platform to another. You'll find that 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. The [feature comparison matrix](#) located at the end of this ebook can help you structure that part of the discussion.

Beyond individual features and functionalities, there are some broader considerations that will impact the adoption and long-term success of integrating a collaborative whiteboard into your design process:

01. [User experience](#)
02. [Integrations with your tech stack](#)
03. [Templates and breadth of use cases](#)
04. [Cross-device experience](#)

01. User experience

Why you need it

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 smooth collaboration both within and outside of your design team.

Design leaders and workshop 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 for user experience:

Look for features that make life easier — like bulk actions for frequent tasks such as sticky note creation and imports — and those that reduce mistakes and save time — like smart drawing and diagramming.

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 →](#)

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

02. Integrations with your tech stack

Why you need it

Integrations create continuity and improve team autonomy — whether you're transitioning from a brainstorm into execution or syncing the latest version of a design to the project hub.

Integrations will reduce manual work, shoulder tapping, and empower your team and stakeholders with the information they need to take action.

How to evaluate

Look for integrations that support key cross-team workflows such as:

- Project & task management
- Wireframing & prototyping
- File storage and documentation
- Communication (chat/video)

Think about a collaborative online whiteboard as a potential hub for your design projects. Assess which tool will help you best achieve a “big picture” view of projects and improve the critical workflows that span tools and teams



See it in Miro:

[Apps & Integrations →](#)



Seek out integrations that can reduce the complexity of processes and empower your team to work more autonomously. Bonus: look for vendors with a developer platform (e.g. APIs, SDKs, etc.) indicating transparency and openness to partnership.

03. Templates and breadth of use cases

Why you need it

A robust template library signals the breadth of use cases the tool can support. Helping to meet the needs of a wide range of different tasks means reducing the number of tools needed in your design process. Pre-built templates also help slash the time required to prepare for meetings and accomplish tasks. And for leaders, custom templates establish best practices to help scale processes and ensure consistency across the design 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](#) →



An infinite amount of space that can host as many templates as you need will be key to creating a visual project hub and improving cross-functional collaboration.

04. Cross-device experience

Why you need it

Whether your team works remotely, in person, or a combination of both, you need access to your boards while away from your primary work station. Cross-device support allows you to work in whatever environment best meets your needs and stay connected across all of your devices — from discussing designs on large monitors in conference rooms to sketching new concepts on a tablet at home to quickly responding to comments from your mobile phone while on the go.

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 which are especially beneficial for designers. To marry the physical whiteboard experience with virtual collaboration and reduce time after in-person sessions, look for the ability to automatically 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:

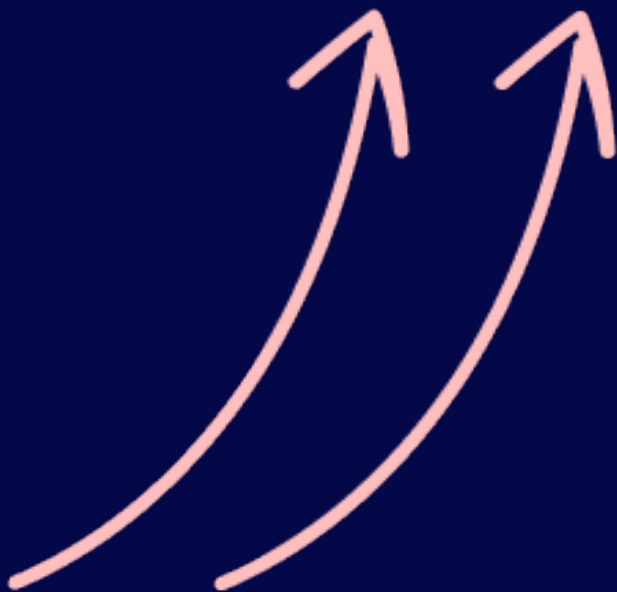
 User experience <i>Is the tool intuitive and does it deliver a robust range of capabilities for users & facilitators?</i>	Miro	Vendor B	Vendor C		
<input type="radio"/> Real-time multi-user collaboration					
<input type="radio"/> Intuitive interface					
<input type="radio"/> Unlimited workspace and 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.

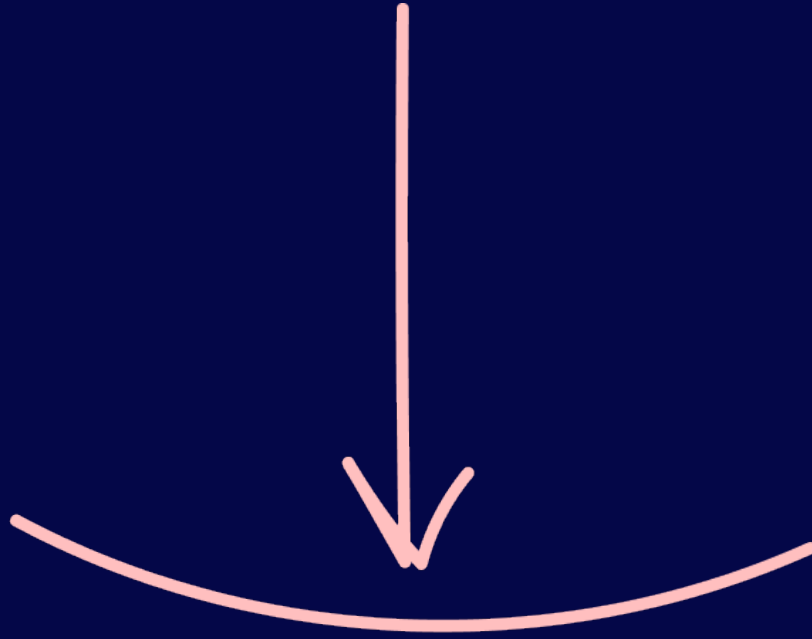
Interactive checklist preview:

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"/>	
		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"/>	
		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"/>	
		Vendor B:	<input checked="" type="radio"/>	
		Vendor C:	<input type="radio"/>	
	What support does the vendor provide?	Vendor A:	<input type="radio"/>	

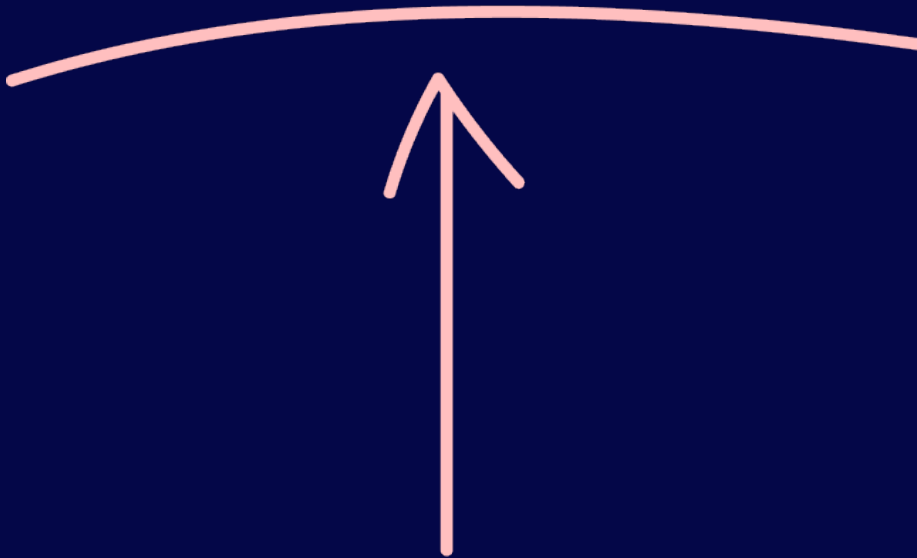


miro.com/miroverse/vendor-evaluation-checklist/

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



About Miro



Miro is a visual collaboration platform that enables design teams to work effectively together to solve customer problems and create delightful customer experiences. With Miro, designers can bring in stakeholders from product, research, and engineering to align on objectives, advocate for the customer, evangelize design thinking, and generate better solutions than ever before.

Winning teams choose Miro:

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

“From immersive workshops to better, more inclusive team workspaces, we turn to Miro. It creates incredible experiences for us at Salesforce and our customers.”



Eleanor Sandford,
Director, Design Lead at Salesforce Ignite

Want to know more about what our customers think?

[Read our reviews on G2 Crowd](#) →

“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 99% of the Fortune 100



Proud to be a leader on G2



Appendix

Feature comparison matrix

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:			
Figma			
Sketch			
AdobeXD			
Invision			
Airtable			
Asana			
Azure DevOps			
Box			
Confluence			
Dropbox			

G Suite (Google Workplace)			
GitHub			
MS Teams			
MS One Drive			
MS 365			
Sketch			
Slack			

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			
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			
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:		

<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:		

<p>What support does the vendor provide?</p> <ul style="list-style-type: none"> • Do they offer hands-on onboarding? • Do they offer 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:		