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# LEVERAGING VIRTUAL COLLABORATIVE WHITEBOARDS



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KNow Research

## Three Ways for Customer Insights Professionals to Leverage Virtual Collaborative Whiteboards

The need to work virtually seems to have no end in sight! So, we sought ways to make our interactions with participants, clients, and remote teams more interactive and engaging.

### **The goal? Recreate the benefits of an in-person experience for both participants and clients.**

The team at KNow explored and experimented with virtual collaborative platforms to find the best fit. We discovered that not only can we use these platforms to recreate the backroom experience for participants and clients, but we can also use them for analysis and reporting – an unexpected and exciting outcome!

**What are Virtual Collaborative Whiteboards?** Online tools that remote teams can use to recreate the experience of brainstorming and project planning, both on whiteboards and in meeting rooms.

Current solutions are built for product development, design, and project management teams who work collaboratively on long-term projects over long periods. They simulate the experience of using sticky notes, markers, and bulletin boards but with the flexibility and auto-save of a digital experience. Items can be moved just as you would with flip charts but extend to include features such as task assignments and syncing with calendars – things you can't do on a physical whiteboard. And, because of the pandemic, these tools have taken off even more as teams work remotely!

**Some examples?** [Miro](#), [Mural](#), [Stormboard](#), and [Conceptboard](#) are some of the more popular brands. We chose to focus on Miro for its ease of use and flexible tools.

**At KNow, we have found 3 key ways to use these boards in gathering and reporting on insights. They've upped our collaborative game, and they can do the same for you!**

## #1 Presenting Stimuli

Showing participants stimuli in research is more intriguing when using the virtual whiteboard. PowerPoint limits sharing linearly and forces sharing to stay within the size of a slide. In Miro, we have a **limitless canvas**, and thus the option to move in any direction. We can zoom in and edit live, showing participants changes as we go and adding their comments to demonstrate what we're hearing. Rotating concepts to avoid order bias is easier as well.

Especially for concept testing or projects that involve **concept testing, communication/message testing, and/or design iteration**, using a whiteboard allows a moderator to quickly move between items and add sticky notes or other indicators for:

- Voting
- Ratings
- Rankings
- Language suggestions/edits
- Underlining points of emphasis
- Capturing verbatims

### Case Study:

We used Miro for an international concept test that required showing participants a series of brand promises and messages. In some groups, we had up to 30 statements to review. Miro made the massive set of stimuli doable!

Participants voted on their favorite messages and chose images that represented their feelings about the concept. As they gave their feedback we added ranking scores, crossed out words or ideas they did not like, highlighted, and underlined what was preferred. We then pulled the group's favorite statements to a new area with other stimuli they selected, to create a visual representation of their discussion.

As the groups continued, we had a historical record of how each concept iterated. We were able to make changes in between groups, down to the very last moment as the moderator was introducing herself for the next group, since everything lived on the same whiteboard.

**Bonus:** You're not limited to using the tool only in virtual groups! In live groups, we project the same board to the participants in the audience as to the client teams in the backroom. As a result, we avoided making paper copies for each group, running to the copy center, collecting all the copies after each group, and/or taking photos or carrying a stack of papers home with us.

**Pro Tip:** For both in-person and online groups, consider appointing a **backroom “scribe”** to run the whiteboard, allowing the moderator to focus on the discussion.

## #2 Project Team Collaboration

Engage your 'backroom' partners! [KNow's proprietary virtual backroom](#) enables virtual backroom communication, but we use Miro to **take backroom collaboration to the next level!**

When in-person for research, our backroom facilitator writes on physical flipcharts as others participate. Using a **facilitator or scribe to “drive” the Miro board** during the group discussion makes it easier for participants to sit back and discuss instead of trying to navigate a new tool.

### Case Study:

For a group that had an online, asynchronous bulletin board ahead of synchronous, in-depth interviews, we brought data from that digital board into Miro and assigned clients to review. Clients were able to interact with the data prior to the interviews more flexibly and intuitively than if they had navigated an online research platform – which can be a challenge to 'drink from the firehose' when learning an unfamiliar platform!

We also sent a physical package to each client participant with assigned colored sticky notes and asked them to capture insights on their unique color sticky. They can then take a photo of their stickies and send it to the facilitator who uploads it to the board. Miro allows images of handwritten sticky notes to easily be imported and converted to text. Sure, the words could be emailed and typed, but for those who miss sticking their sticky notes to the board, it added some of the tactile interactivity back to the project!

When first using Miro with clients, many can be hesitant to engage in the platform – and we had concerns about giving our clients too much additional work! While it's a new tool to learn, with tricks and idiosyncrasies and a short learning curve, as clients become more familiar with it, they are more eager to dig in and play around with the data.

**Pro Tip:** Start small. Give client teams one whiteboard exercise/ assignment on the first project, and slowly grow the interactive component as their confidence on the platform increases.

### #3 Analysis and Reporting

We also discovered – in the process of experimenting with the tools – that we could use them to **synthesize data and visualize the key findings, quickly and succinctly**. If you're the type to pin everything to the wall and move ideas around, these tools are for you! They let you move ideas without the mess and to invite other collaborators to join in.

#### Examples include:

- Export data from an online board, copy and paste it into Miro, and convert it into sticky notes
- Take your data from Excel, move it around, and color code it by segment or topic, instead of filtering and sorting linearly
- Pop your ads/creative concepts in Miro to take visual notes – you will easily see what you underline/star/note the most
- Moving and stacking stickies into categories, to bring key themes to the front almost instantly, is great for visual learners
- Use Miro's templates for visualizing information (e.g., storyboards, personas, and process diagrams) when you need ideas for how to present the information in a report
- After building out the board in Miro, it can be exported easily into PowerPoint
- Automatically save all your notes, without worrying a breeze might blow your notes off the board!

## Case Study:

On a recent project, we saw a story emerging early on in the fieldwork. Our analyst jumped into Miro and created a 'mind map' to visualize the story as the conversations happened live. Then, when it came time to create the report, the data was already synthesized!

**Pro Tip:** For more about how to use virtual collaborative whiteboards for analysis, come hear [Casey Bernard's](#) presentation at the [QRCA Conference](#) in January 2021

## In Summary

1. **Start simply** – Try using a virtual collaborative whiteboard to display stimuli during fieldwork. Use stickies and other visualizations as you become more comfortable.
2. **Assign a scribe** – Team up! This lets one researcher drive the board, while the moderator focuses on the conversations, and the client team observes.
3. **Be flexible** – Give clients time to get used to the new approach with the option of collaborating in the platform after they feel comfortable.
4. **Rely on what's already built** – Explore the available templates for analysis and reporting for visualizing common concepts from the whiteboard providers

At KNow, we are committed to collaborating virtually, and will continue to use and explore virtual whiteboards. They have quickly become a go-to tool for almost every project. We look forward to finding even more ways to use them as a collaborative approach to uncovering and reporting insights.

*Let us know how you've upped your collaboration game lately: [admin@knowresearch.com](mailto:admin@knowresearch.com)*