

MIRO Collaboration App

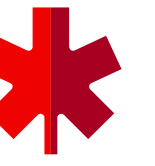
Overview for Network Consultants



What is MIRO?



Introduction



- BDC Advisory is pleased to provide MIRO licenses to all active Network Consultants and their clients
- A collaborative and interactive **whiteboard tool** (working space) that once mastered will elevate how you execute your Advisory projects with clients
- This platform can be used to enhance remote delivery or in-person team exercises to better **collaboration, participation and interaction**
- Collaborators can work on their project, visualize, express and organize their ideas simultaneously

The app provides you with multiple templates to organize client sessions around brainstorming, idea generation, planning, designing, ice breakers etc.



Search templates by name, category or company

Show when creating a board

Meetings & Workshops

Bring in-person energy to ice breakers, retrospectives, design sprints, and beyond.

- NEW SMART MEETINGS
- SMART MEETINGS NEW
- SMART MEETINGS NEW
- NEW SMART MEETINGS
- NEW
- NEW

Miro OKR Planning

Miro Project Kickoff

Deloitte The Way We Work

Salesforce Ignite V2MOM Workshop

Miro Quick Retrospective

Evolve Partners Terrific Ten Ice Breakers

miro Brainstorm 22

Chris

Sadie

Matt

Hisham

Order

Receive order

Check stock

In stock?

Out of stock

In stock

Cancel order

Invalid

Card valid?

Check credit card

Milestones

Receive

Performance

Product marketing

User activation

Product Integrations

Product Hunt goes live

Press embargo lifts

Tech rollout starts

Customer announcement emails start to go live

Product changes post goes live

Product announcement

Go/No-Go for marketing activities

09 10 11 12 13 14

100%

Project proposals, execute kickoffs and conduct workshops



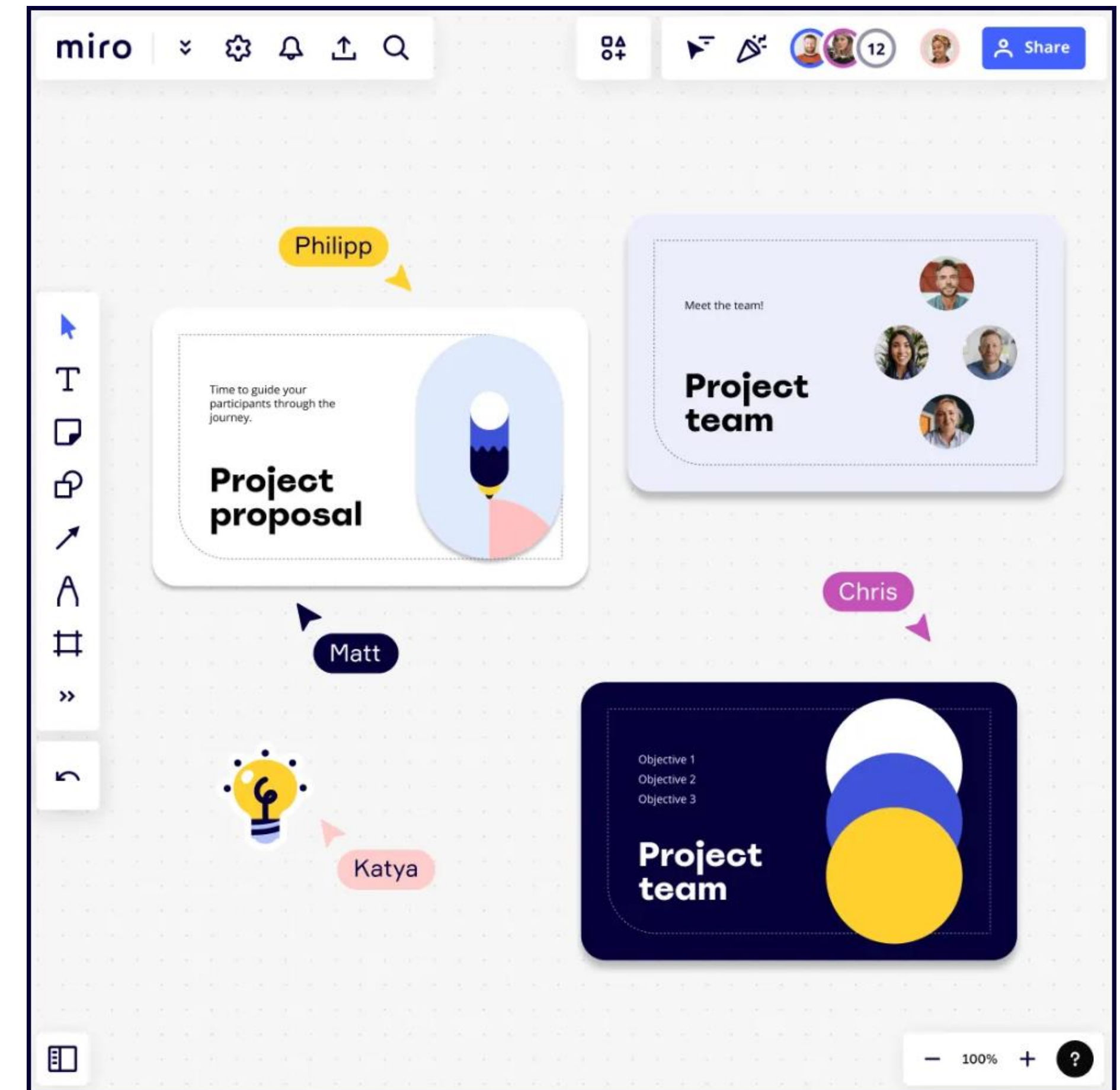
Bring clients into the conversation

Miro gives consultants and their clients one living, dynamic space to go from project brief to big business breakthrough:

- Client pitches
- Project kickoffs
- Meetings & workshops

Example templates (click each link to check them out):

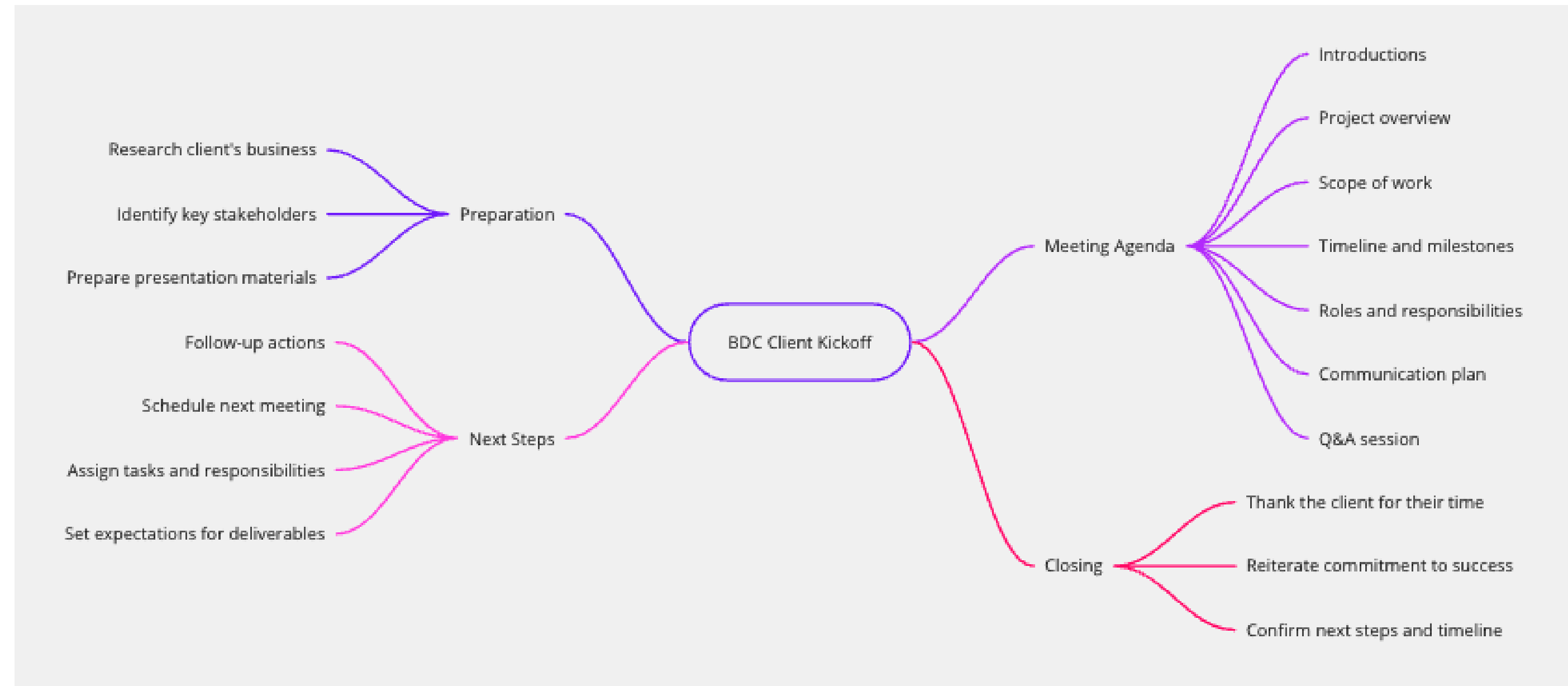
- [Workshop Planning](#)
- [Project Kickoff](#)
- [Project Kickoff 2](#)
- [SWOT Analysis](#)
- [Business Model Canvas](#)



Make and reuse custom templates



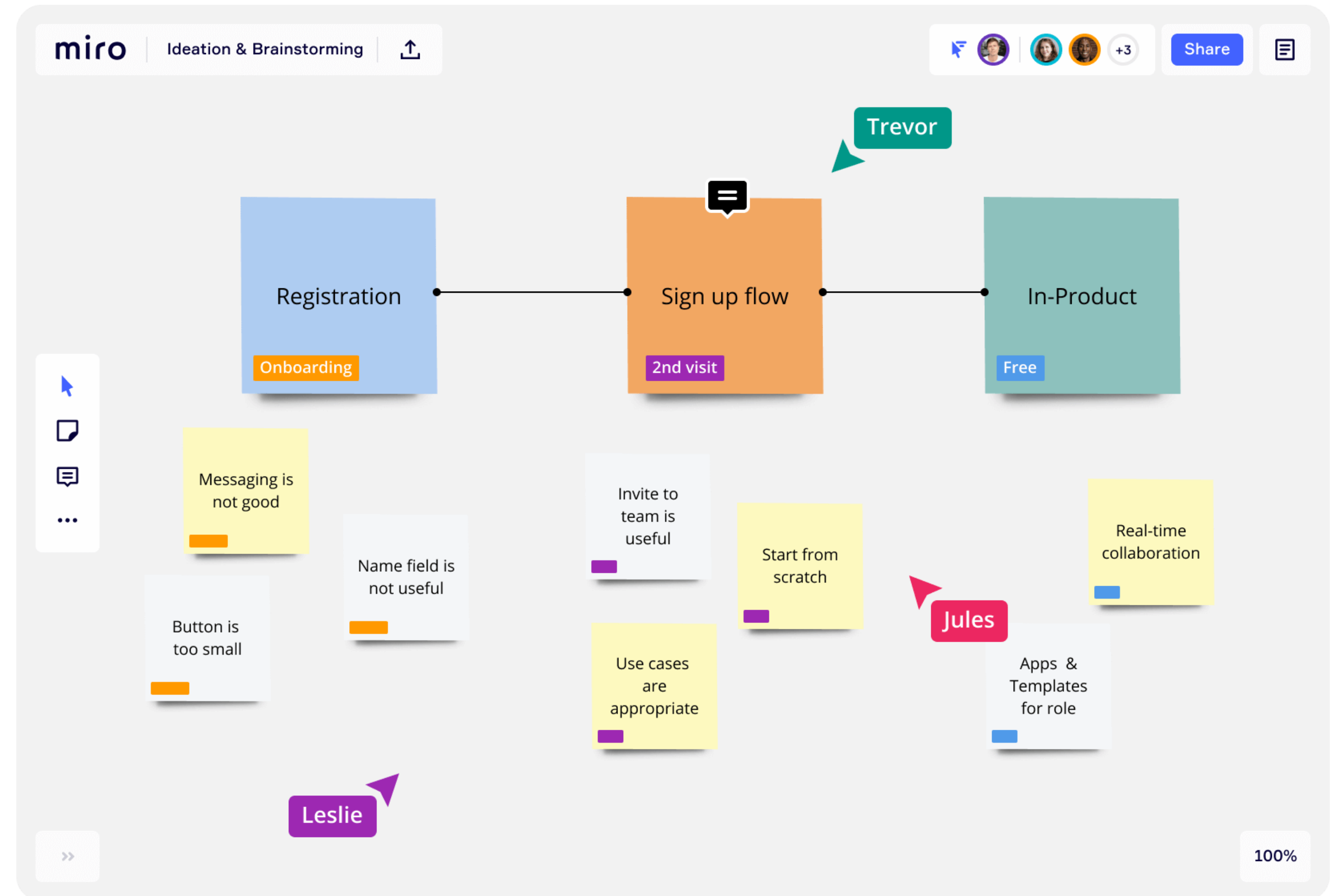
- Any item, group of items, frame, group of frames can be turned into a custom template
- Turn a full "**board**" developed for a client workshop into a template
- Custom templates can be **personal** or **shared**

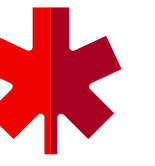


Versatile tools and functions to facilitate activities



- Include workshop pre-work from other sources (like Powerpoint) on the board
- Image and video insertion
- Sticky notes, styles & emojis
- Forms, drag & drop tools, drawing
- Diagrams and connectors
- Comments and votes
- Chat





Advisory Deployment strategy

How will consultants
learn to use MIRO?

Approach



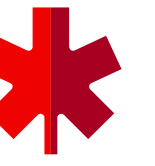
- Licenses are now available to all BDC Network Consultants who are already skilled in using MIRO or eager to learn how to use it
- With commitment, experimentation, and practice, you'll be able to use MIRO live with clients in no time.
- BDC Business Advisors and Consultants will organically adapt MIRO into their delivery approach over time
 - BDC Business Advisors and consultants will learn and share approaches together
 - Each BDC Solution Practice will gradually standardize approaches and templates to leverage the tool e.g.: Running a BDC project kick-off meeting using MIRO
- Learners are encouraged to gain knowledge through hands-on experience and by utilizing MIRO resources and online learning tutorials.



Using the app

Virtual or in-person

How to use MIRO virtually



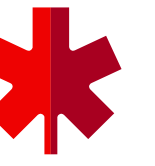
- Virtual workshop – Once set-up
 - Open your meeting in MS Teams as usual
 - The facilitator can screen share their MIRO “board”
 - Invite participants to log into MIRO for interactive activities
 - If ever transmission quality is an issue, consider closing your camera in MS Teams and only use the audio portion while working in MIRO
- Virtual workshop – without participant interaction
 - Open your meeting in MS Teams
 - The facilitator can simply screen share their MIRO “board” to present different PowerPoints, documents, links or videos in a sequence without bouncing from one screen to the next

How to use MIRO in-person



- In-person workshop
 - Everyone with a laptop who is linked to your MIRO team can open the app to collaborate and co-create
 - Facilitators often share the MIRO board on a screen simultaneously





Getting started

Licenses, pre-clearance
for client email domains
and logging into MIRO


BDC Consultants – Your starting point to access MIRO ✖

Step 1 - Go to any of your SharePoint project sites. Click the blue button “Request to use MIRO app for this client” and you will be redirected to a Microsoft Form


Libraries

 Client Documents
Limited


 Other Related Documents
Limited


 Tools and Deliverables
Limited

Notes

+ New ▾  Edit in grid view  Share  Export to Excel  All Items ▾ 

Français

 Add client
Secure Client Document Sharing

 Request to use MIRO app for this client

To request a MIRO license



Step 2 - Fill out the short form to request your license

Request to provide MIRO access for this project

To use our MIRO whiteboarding (visual collaboration) application for this project, you can request a license (if you haven't already activated one). You will also need to provide your client(s) email domain for "security clearance" before you can invite them to join your sessions via Miro.

Note: For clearance purposes you only need to provide the [@company.ca](#) part and not each participant full email name. To invite other participants like an outside shareholder or accountant, do so by specifying their email domains here as well: [@participant.ca](#) Again, we do not need their full email name.

Hi, Neil. When you submit this form, the owner will see your name and email address.

* Required

1. Please specify your request

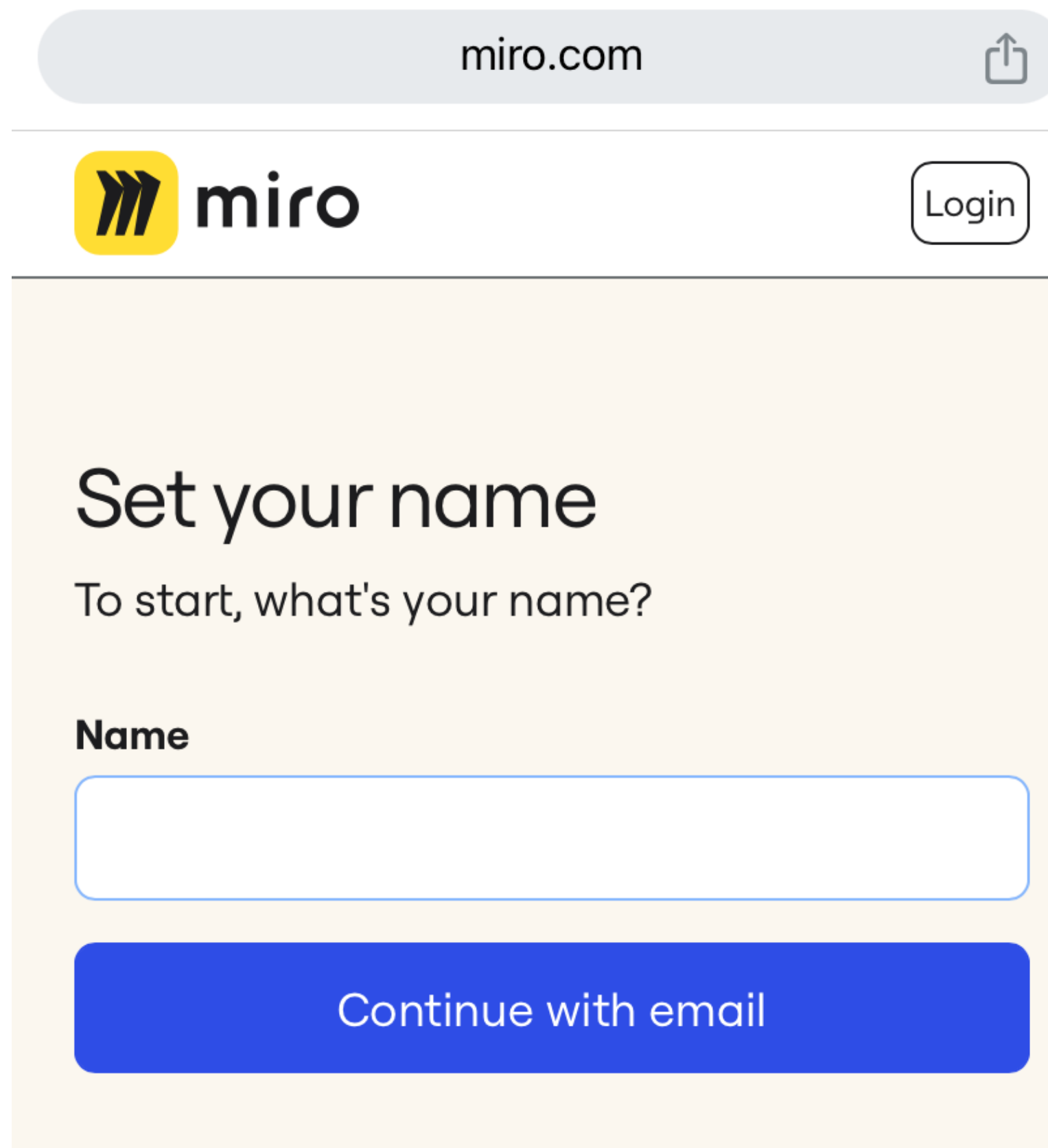
Add / Remove a client's domain

Request Miro license

Next

You only need to request a MIRO license once. In the event your MIRO license goes dormant (extended period of inactivity), you may need to request a new license using this same process.

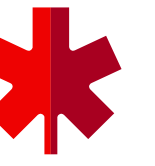
You will receive an email invite from MIRO.com to set-up your account

A screenshot of the Miro.com account setup page. At the top, the browser address bar shows 'miro.com' with a share icon. Below the address bar is the Miro logo (three yellow slanted bars) and the word 'miro' in black, followed by a 'Login' button. The main content area has a light beige background and contains the heading 'Set your name' with the subtext 'To start, what's your name?'. Below this is a text input field labeled 'Name' and a large blue button with the text 'Continue with email'.

Reminder:

- Use your **personal email address** for now, NOT your BDC email.
- Our IT department is working on integrating Single Sign-On access via your BDC email address into the MIRO app.
- We will advise when this programming is completed.

Request security clearance for client's email domain



Step 3 - Select the “add/remove a client's domain” and fill out the form

Request to provide MIRO access for this project

To use our MIRO whiteboarding (visual collaboration) application for this project, you can request a license (if you haven't already activated one). You will also need to provide your client(s) email domain for “security clearance” before you can invite them to join your sessions via Miro.

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* Required

1. Please specify your request

*

Add / Remove a client's domain

Request Miro license

Next

Request to provide MIRO access for this project

English (United States) ▾



* Required

2. Client company name *

Enter your answer

3. Provide the email domain of the company or any other outside participants
IMPORTANT: if you need to add more than one domain, separate them with a semicolon ; E.g.
[@company.com](#); [@accountant.com](#) *

Enter your answer

4. Please specify if your request is to add or remove a client's domain *

Add a client's domain

Remove a client's domain

Back

Submit

Request security clearance for client's email domain



- Once you've done this step, you will be able to go into MIRO to set-up your "Projects" and "Boards" and invite clients from this email domain to collaborate via the app.
- This security clearance step is added protection to ensure only registered clients have access.

Once you've set-up the user teams in MIRO whom you are giving access, they'll also receive an email invite



CBARK-P-MiroAdm01@bdc.ca has invited you to join the BDC - Consultant Network Management team

Get started

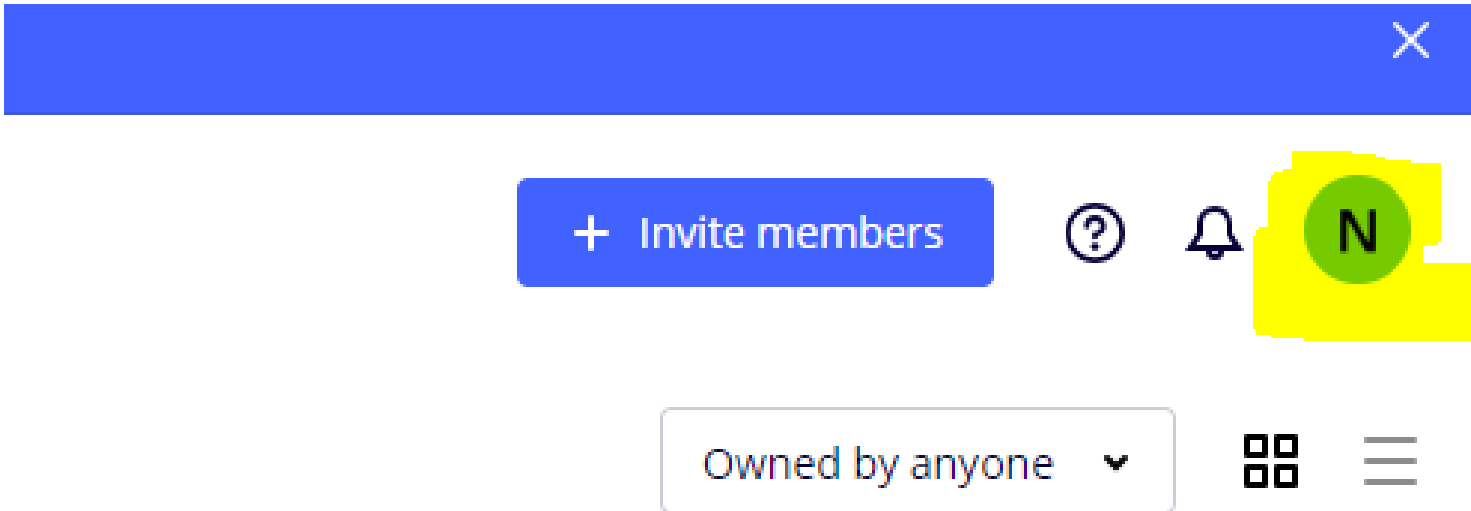
- Your client will simply click "Get Started" and follow the prompts.
- Note: Unless you've first registered their email domain (ex: @CompanyName.com), you won't be able to invite them.

Change language preference to French

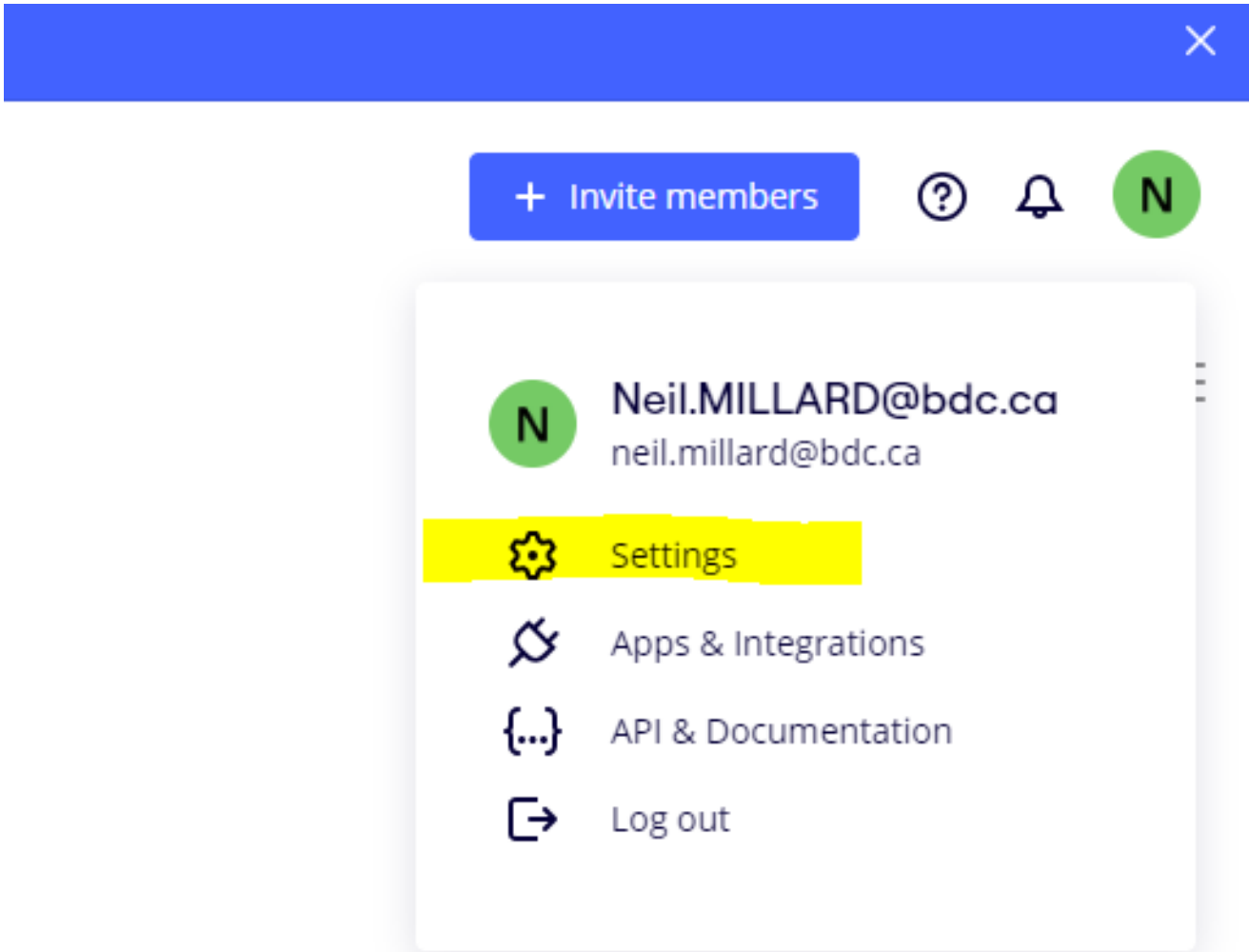


Log into your MIRO account, click on your green account icon top right of page, click on "settings" and scroll down to "language" to change.

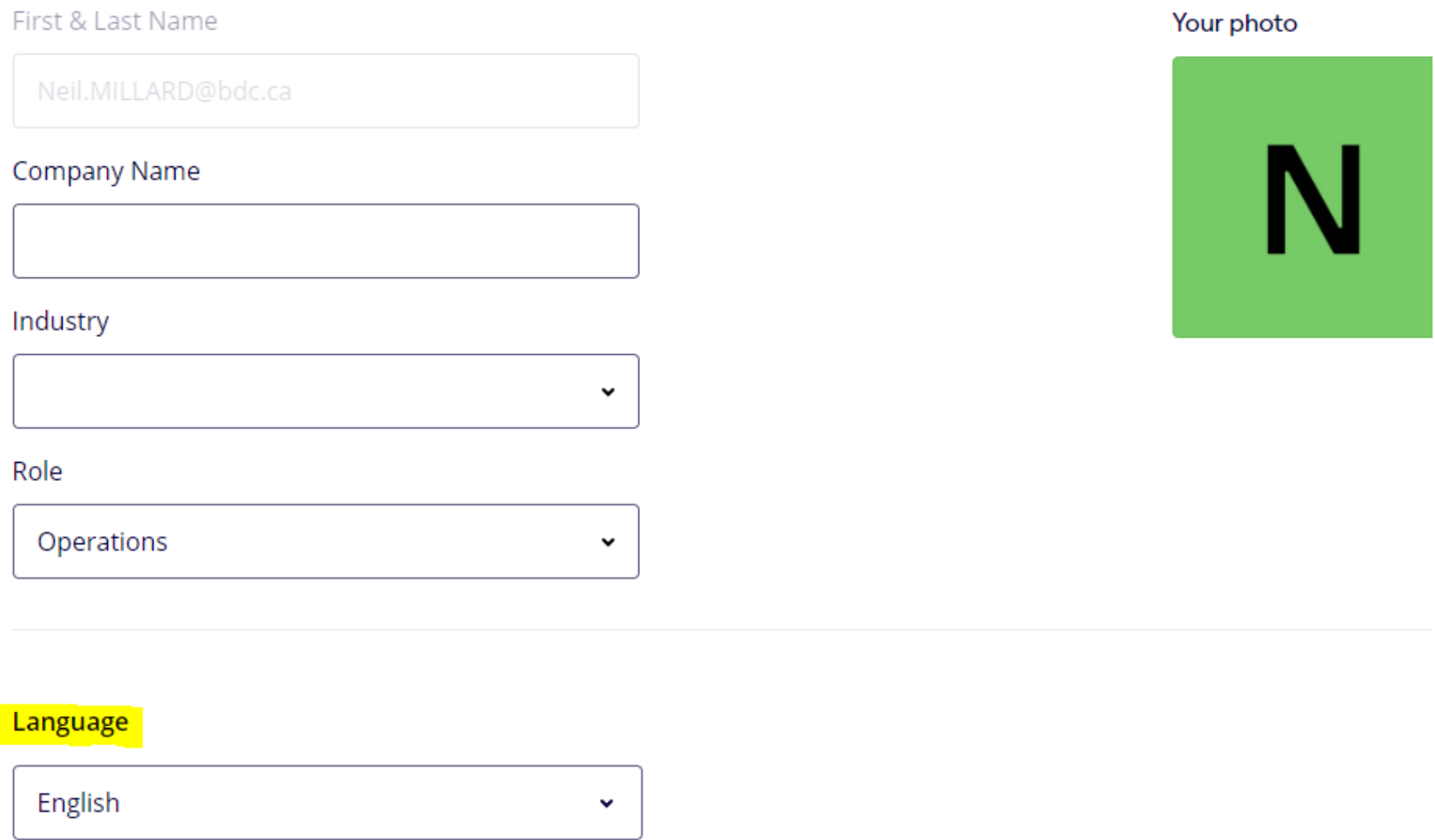
1



2



3



Summary of steps/links to get started



First time in Miro?

- You need a license and to set-up a team to collaborate with your clients
- Click this [link](#) to request or go to any BDC Client Project site and press the MIRO button

Add a client: To work with a client, you need to first register their email domain

- Use this [link](#) to add a domain in Miro
- Or by clicking on the Miro button in your SharePoint project site

To access the application: Click on <https://miro.com/app/dashboard/>

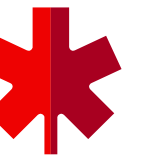
To remove the client domain once the project is complete or to cancel your license - Use this [link](#)



Preparing for a MIRO session

Miro is organized by
team, project and board.

MIRO structure and important terminology

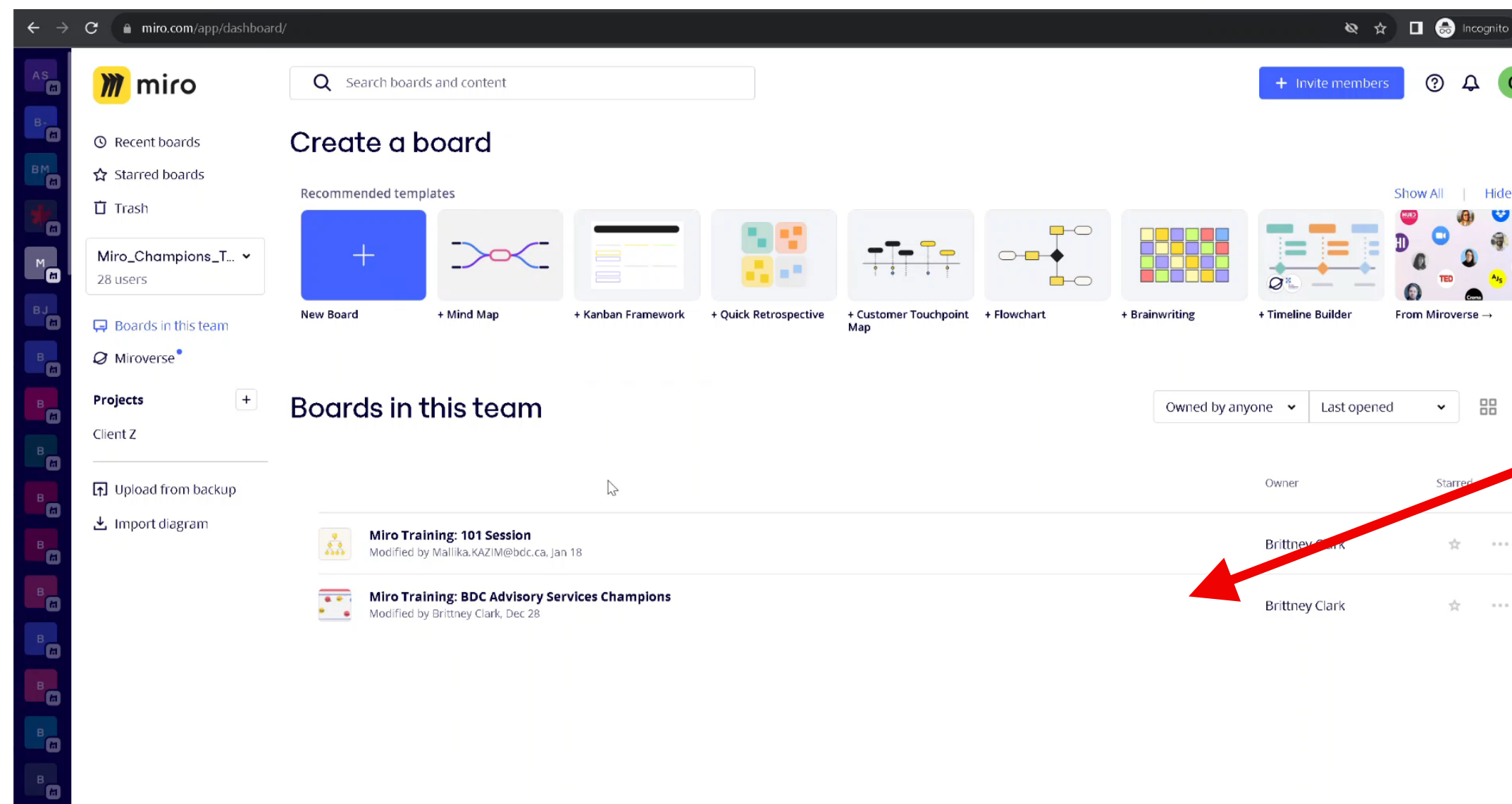


- **TEAM**
 - You can be invited to join a TEAM or create your own.
 - You can be a member of one TEAM or many. An example of a team might be a BDC Business Advisor (Project Lead), an external BDC Consultant and a Client with multiple participants (employees).
 - A member must always be associated with at least one TEAM in order to have access to a MIRO session.
- **PROJECT**
 - Linked to a team. An example of a PROJECT would be the name of the Advisory mandate. Ie: Operational Efficiency Project ABC, Strategic Plan XYZ etc...
- **BOARD**
 - Where you will **collaborate** with TEAM members and co-create.
 - You can have multiple BOARDS under a PROJECT for each client session. Ie: Kickoff meeting, financial review session, SWOT analysis etc.
 - Each BOARD can have all TEAM members access or be restricted to certain members only

Once you are logged into MIRO, set up a team and invite participants

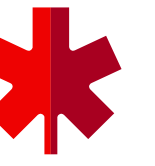


1. Retrieve your team in the left panel.
2. Invite participants to your team.
 - Note that inviting participants to your team does not automatically grant them access to your boards. The board must be explicitly shared with the entire team.
3. The next slide details the permissions setup.

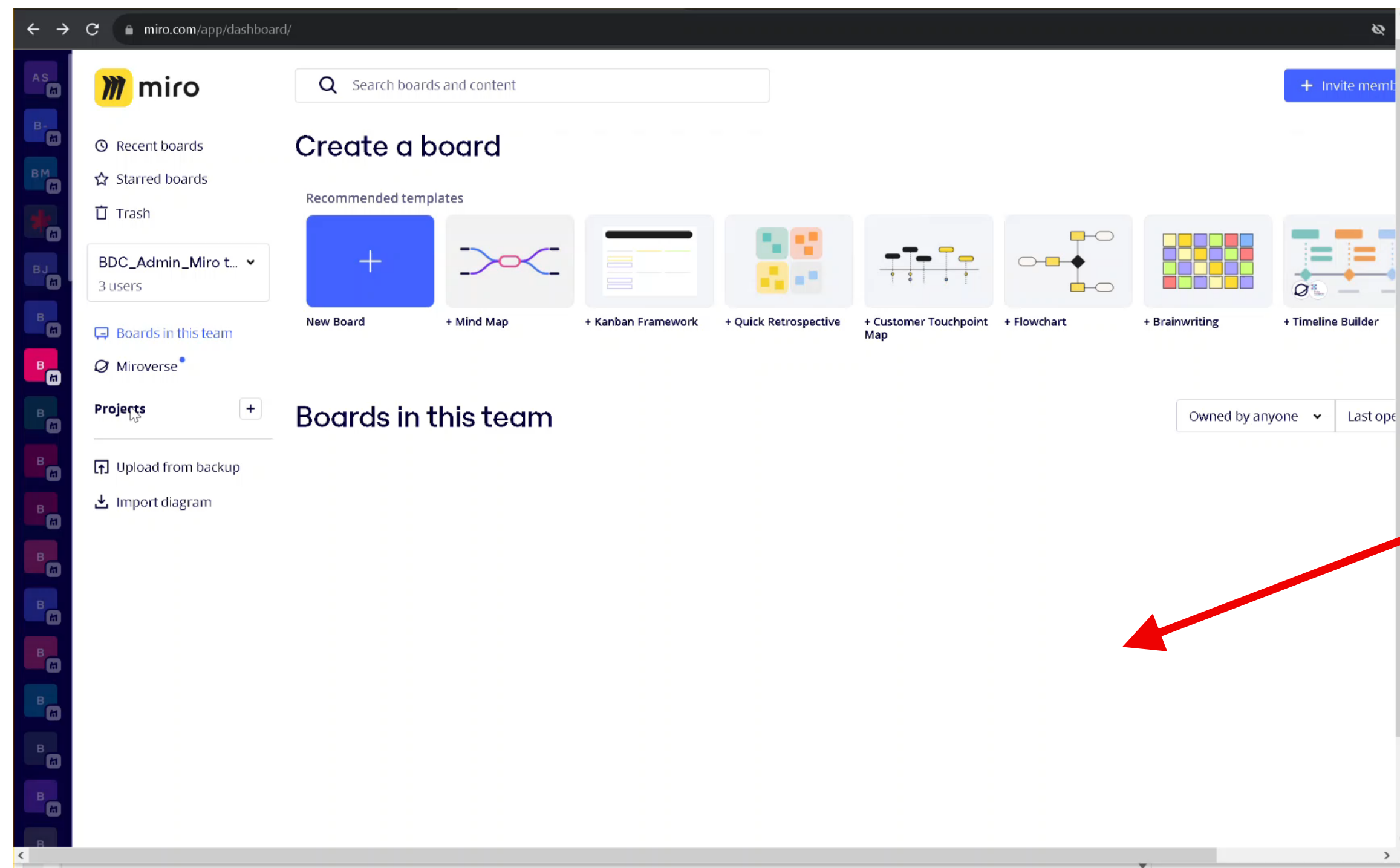


Click on the video to view the steps

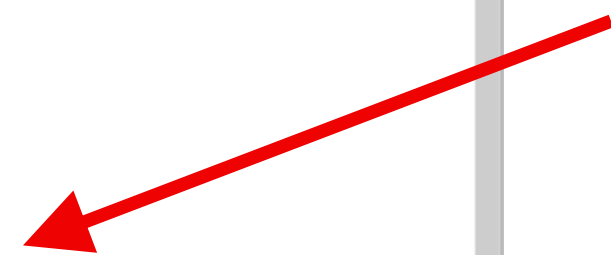
How to set-up access to your projects and boards



- Organize your work by creating your projects and then adding your boards inside each project
- Add members (their full email address) from your team to your projects to give them access
- See at a glance who has access to your project
- Access to Boards can be granted to all TEAM members or be restricted to certain members only



Click on the video to view the steps





Creating and saving templates

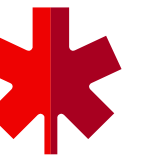
Saving boards for repetitive use

Populate Advisory Services templates into MIRO



You can create your own templates that can be reused to execute your client sessions.

- Any item, group of items, frame or a group of frames can be turned into a custom template
- Custom templates can be **personal** or shared with a **team** or the **company**
- BDC Advisory Services will eventually develop and provide templates that can be used to deliver our methodology.
- Turn a full board into a template : Export icon > **Save board as a template**
- Link on how to: <https://help.miro.com/hc/en-us/articles/360019018899>



MIRO tutorials

Essential resources

MIRO provides a full range of learning tools



- Miro academy
- Miro help center
- A dozen courses between 5 minutes to 1 hour ranging from basic to advanced features: Courses
- MIRO video library (typically 3 to 5 min) : Videos
- Sign-up for **live events** hosted by MIRO experts with different topics and levels. Ask questions and learn about new features: Webinars