



## IRONSHIELD Uses G Suite and MindMeister for Business Planning and Client Presentations



Scott E. Plaskett, CEO

### At a Glance...

- ★ Easy onboarding and sharing through Google Drive
- ★ Quality control at client meetings through the use of map templates
- ★ Live mind mapping during presentations improves engagement

IRONSHIELD is a fee based financial planning firm that offers a variety of programs and plans to help clients meet their financial goals. As part of the firm's expansion plans in 2011, CEO and senior financial planner Scott Plaskett went looking for cloud-based tools that would enable staff across all office locations to seamlessly work together.

### MindMeister and G Suite

Scott switched the whole company to G Suite and added MindMeister to their Google Drive account. This integration enables users to attach documents to mind maps directly from Drive, create new maps from inside Drive and more. "As we bring on new staff, they're able to create new MindMeister accounts and sign in using their Google account, which is very practical," says Scott. "The integration also lets us create and share maps through Drive, which we often use to provide presentation templates for colleagues in other offices."

### Use Case #1: Preparing Podcasts

Scott uses MindMeister to prepare his bi-weekly podcasts, which are available on iTunes. "All the content of my shows is developed in MindMeister. The mind map format allows my mind to flow freely and lets me structure my show notes easily," explains Scott.

### Use Case #2: Webinars & Presentations

"The only presentation tool I need is MindMeister," says Scott. "I don't even use the built-in presentation mode. The map itself is like a live worksheet for me, which I create right in front of the audience's eyes. When I get started, people are sometimes skeptical about the format - all they see is an empty canvas with a bubble in the middle. But once I start creating more topics, expanding the map while I talk, this changes drastically."

*"After a presentation with MindMeister people often come up to me and tell me how engaging it was, how easy they found it to follow my explanations because of the map."*

## Website

[www.ironshield.ca](http://www.ironshield.ca)

Region: Canada

Size: 10 employees

Industry: Financial Services

## Use Case #3: Working With Clients

IRONSHIELD also uses MindMeister during client meetings. "In our business we often deal with rather complex financial issues and strategies which can be difficult to communicate. Mind maps allow us to deliver this information in a way our clients can consume very easily, especially when we create the map live in front of their eyes. We've developed templates for this purpose which all our financial planners can access through **Google Drive**. The templates guide them through their presentations and automatically ensure that each piece of information comes up at the right time. They function as a type of quality control for us.

*"By the time the consultant is done with his presentation he has developed a massive mind map, a comprehensive representation of the strategy, which the client fully understands. The consultant has built his case, the client is educated and everyone is on the same page."*

Additional files such as **spreadsheets** or **documents** are simply attached to the respective topics in the map.

## Use Case #4: Business Planning

"At the beginning of the year I create a mind map for our new business plan. This map contains branches for each department in our company, and each department then creates a master map of their own which is linked to their branch," explains Scott. "The maps contain goals and accountability metrics each department has to be aware of (e.g. number of financial leads written)."

Creating their business plans with MindMeister ensures that all employees can easily access them over the course of the year to review goals quickly and ensure everything is on track.