NotDocuSign

Take-home PM Assignment Solution Proposal

Introduction

General Context

This document is part of the work I did for a French electronic signature provider as part of a take-home assessment for a Product Manager application. To avoid any legal issue and as a courtesy, the name of the company and any brand or sensitive information related to them are intentionally hidden.

However, to avoid ending up with "[company_Name]" everywhere, making this document less readable and appealing, we will rename the company by **NotDocuSign**. *(Yes, I am a cheeky and inspired man. Pardon my French)*

The work is not as complete as I'd have it to be, but the goal was to **comply with a work time limit**. Thus the document is built to reflect that constraint. To be honest, I proceeded to do deep **market research**, **competitive analysis,** and even a **user interview** with a friend, whose profile fits the company segmentation strategy. However, to keep it concise, deliverables like **Persona**, **Customer Journey, feature table**, **SWOT**, **Porter's 5 Forces Analysis**, etc… will not be available in this document.

Motivations

I made this document available to help people in the process of a Product Manager application or people seeking inspirational resources for their work as a Product Manager.

Feel free to contact me if you have any questions or any useful or informative advice to share with the Product Management community.

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Read This - Important Disclaimer

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Spelling and Grammar

While I consider my English pretty good for professional usage, this document may suffer from spelling and grammatical errors. Before coming to me, to boldly propose a spelling or grammar correction (actually don't hesitate), ask yourself do you even speak French ^_^ *(I'm joking, everybody is cool in France, ask Emily in Paris...)*

Jokes aside, let's start! I wish you a good reading.

Assessment Summary

After having taken notice of the wording, I asked for precisions to better frame the case. Below is a summary of the wording and the answers to my questions.
Wording

After conducting market research, competitive analysis, or any research of your choice, start by playing with our product demos then identify important improvements or new features and list them as prioritized epics. Select one of them and list associated user stories. Finally, select one of the user stories and write it down. You must do it both for the sender and the receiver cases.

Provided constraints

- You may do it to reflect a 5 hours limited time
- Max 3 epics for each case
- The selected user stories must have at least one asset (mockup, diagram, …)
- Choose <u>any format</u> for your answers as long as it is written in English

My Questions

- **Are there any business purpose or context, or any goals behind that need?** => You are free to choose any scenario
- **How will you assess the success of the improvement outcome?** => You are welcome to come up with any KPIs
- **Whose target this improvement is for? Clients, developers using the API, final users?** => A client (document sender) and a final user (document receiver). You are free to complete with more segmentation following your scenario
- **Are there any technicals, functional constraints like deadlines, incoming events, budget limit, technical specifications (support, performance, security, desktop version …)** No deadline or technicals constraints, you are free to prioritize as you want

Company Mission Recall

NotDocuSign mission is to enable a **fast**, **legally binding**, **secure**, and **practical** electronic signature service for its clients in France and beyond. **NotDocuSign** has already served more than 6000 organizations so far and their journey is far from being over nor their motivation.

Discovery

Market Analysis

Overview

The e-signature market is a very competitive market where several players are trying to capture a share of a **growing market** valued to **several billion** euros in the years to come. Internationally, three major companies have the largest share of the global e-signature market: DocuSign, Adobe Sign, Hello Sign. All 3 have publicly stated their big ambitions for the next few years.

Segmentations

Customer profiles

Although the services offered by **NotDocuSign** and its competitors may be of interest to individuals, the vast majority of customers in this market are **businesses** working in the following industries:

- Real Estate
- Human Resources
- Financial Services
- Computer Software
- Marketing and Advertising

User profiles

The users' group is large and diverse. However, they all share common characteristics.

Provided information below, come from a study conducted in **2020** on a population located in Asia* and North America.

Asia is the world's fastest-growing market when it comes to electronic signature

Criteria	Highlight	Observation
Age	Millenials	Undoubtedly 100% are adults as you need to be an adult to be legally bound to a contract. 50% are "millennials" (born between 1977-1995)
Education	Graduated	64% of users are graduated
Neighborhood	Urban	61% live in an urban area
Gender	Male	Most of the users are male but not by much (52% / 48%)
Working status	Employee	82% of people using e-signatures are employees

User research

Why never before?

Most people refer to the fact that they were not aware of these solutions and that they had doubts about their legal value, security, and their ability to cope with this new technology (apprehensiveness, ease of use, time-waster, …).

Reasons documents were e-signed

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80% of e-signed are related personal documents (insurance, health care, loan, real estate, bank, …) when only 62% e-signed for business reasons.

What e-signature type do you prefer?

While answers vary across countries, the most popular e-signature version is **uploading or using a pre-saved signature image**, followed by "**typing name and initials"**.

What challenges or fears do you face?

- Security vulnerabilities
- Technical flaws
- Cloud based-solution reliability
- Legal issues
- Convenience issues

Market Product Review

Key Differentiation Factor

Below is a list of typical factors **customers** care more about when it comes to evaluating an e-signature product against another competitive solution:

- Legal Compliance
- Security
- Reliability
- Features / Practicality
- Pricing
- Customer Support
- User Experience

Product Features

Below is a list of typical electronic signature product features:

- **Document signing** - Allows the signer to easily and intuitively sign documents
- **Reminders and expirations** - Reminds signers of documents that are waiting to be signed and of document expiration dates
- **Sign-in process** - Process of authenticating is secure and seamless
- **Mobile signatures** - Users can easily send and sign documents on mobile devices. either through a mobile app or a responsive interface
- **Signature workflow** - Senders and/or administrators can easily set up and track documents through multiple signature steps
- **Custom branding** - Custom branding can be applied through the signature process
- **Regulatory Compliance —** Meets required regulatory compliance. Example: eIDAS
- **Signature history and audit** - Tracks all document signing history to comply with required regulations
- **Enterprise scalability** - Provides features to allow scaling for large organizations. For example, one of the most asked features by large companies is to be able to a document to multiple signers with fewer effort

Product Integration

Here is a non-exhaustive list of how the product is consumed and technically integrated:

- Web portal
- Mobile application
- iFrame
- API

Product challenges

Bellow is a list of common challenges related to e-signature product:

- **Technical Compatibility** — Using an electronic signature solution requires compliance with user current support, device, software. This great diversity represents a considerable workload because of the diversity of the cases which opens the door to many technical defects
- **Training** — Using an e-signature solution can worry businesses as it will require training their employees and changing long-standing processes with all issues that come with such operation. Moreover, the final user could not trust the process making the initial company investment difficult to recoup
- **Storage** — Most e-signature tools are cloud-based. For the few that are hosted on vendor-specific servers, businesses can be concerned with the level of control they can exert over those servers
- **Proprietary Software —** Along similar lines as the above point, proprietary software can cause users to worry that they must stay with one vendor, lest they lose or compromise any secure documents passed through the solution
- **Encryption** — The encryption capabilities of the e-signature software is crucial to verify the validity of the entire document

NotDocuSign Product Review

NotDocuSign e-signature solution

Note: Once again, this information has been acquired from OSINT data: press, online customer feedback, … They do not reflect the qualitative information the company might possess.

What do people love more about NotDocuSign e-signature solution?
- Data hosted in France
- Subscription without commitment
- Clear and competitive pricing
- Limited file size

What do people hate most about the NotDocuSign e-signature solution?

- Settlement of credits can be complex
- A more complicated ID validation than some competitors
- Customer support seems ineffective in some circumstances

Competitive Analysis

[N/A]

Strategy

Market opportunity

COVID lockdowns helped growth and evangelization

Thanks to COVID lockdowns, the electronic signature market has skyrocketed as people were unable to easily sign their documents face to face. Following this new reality, we saw more and more companies paying attention and adopting the electronic signature process for their contracts and documents transactions and validation.

Sustainable user conversion

The main advantage of the electronic signature is that once adopted you rarely want to go back. Indeed 84% of people who had adopted electronic signatures stated that they will keep using that process even after the pandemic is over.

The best time to invest

As a company, this is the best time to invest, **take advantage of the market growth,** and develop our product with more confidence and aggressiveness.

Vision

As we become more confident in our market's impact, its ability to grow, and the return on investment we can achieve, we must strive to close the gap in features parity and quality with competing products, while maintaining our compelling and profitable commercial offering. By doing so, we expect to see our **reputation and new customer acquisition grow** while increasing our retention through improved customer satisfaction.

To achieve that goal, **we will be working on improving our user experience and building on our current strengths (pricing and customer support)**.

Target

We will focus primarily on the **Human Resource segment** as we expect a boom in recruiting as the pandemic will ease. There will be a huge dynamic in that industry.

Another avenue would be to work on the case of contracts for subscriptions related to the entertainment industry (cinema, park, etc.). Here again, we can expect rapid post-pandemic growth.

But for the aim of this assessment, I will stick to the Human Resource segment.

Needs / Challenges

This is a list of typical needs and challenges people working in that industry might want/face.

Note: This information is taken from personal interviews I have had with people working in Human Resources and from public opinions available on the internet.

As a human resource manager:

- "I am used to working with HRIS software, which is very time-consuming. I would like to not have to enter the contacts manually on the platform but rather have a way to **import employees' information and synchronize** with HRIS as needed"
- "I want to make sure your solution provides double authentication on the signature process to **comply with our specific legal obligations"**
- "I think your product must be able to manage more easily the flows related to the case of multiple signatures through a **validation workflow** to avoid time-consuming mail exchanges"
- "Signing a new contract requires the involvement of many players. I would like to put them in the loop so that they **automatically receive status notifications** as the document(s) are signed"
- "I want to have a **more detailed follow-up of the events** related to the document to better respond to my collaborators' requests on the progress of the file"

Goals

Below is a non-exhaustive list of goals the company should be focused on following our defined strategy :

- **Happiness**: Reduce by half the number of contacts to the support department in the next 12 months
- **Happiness:** Align our satisfaction rate with that of our closest direct competitor (not cited in this exercise) by February 2023
- **Acquisition**: Align our acquisition growth with the volume growth seen in the market from February 2023
- **Acquisition**: Double our client base in the human resources sector within 18 months
- **Activation**: Increase our activation rate by 15% next quarter

Metrics

North Star

While acquisition and the revenue metrics are important in our case, I rather not select any of them as North star in this scenario. Indeed, in my opinion, due to the high competitiveness of the market, the most important aspect to measure is the **retention**.

North Star Strategy and Justification

First, because we are not the leader on the market and people will go more naturally to solutions like DocuSign making our acquisition costs very high. In such circumstances, losing a customer is not even thinkable. You should then, for each new customer, make sure they last longer.

Moreover, it is highly probable, once they adopt our solution they will be less inclined to change as long as they are satisfied. Finally, I think that strategy will also help make our referral grow, thanks to a highly customer satisfaction.

Tactical metrics

Below is a non-exhaustive list of metrics:

- Number of documents sent by a new customer within the first 3 months
- Number of canceled documents by signatories
- Bounce rate by signatories (when the user click but doesn't go through the process
- Number of new customers by week
- Medium rate of abandoned new "collection" by administration users
- NPS (Net Product Score)

Counter metrics

Below is a non-exhaustive list of counter metrics.

- Grow rate Number of tickets opened by power users following the 2 fist months of an epic
- Reviews on G2
- Reviews on Google

Execution

Product Requirements

A list of prioritized epics features, more details could be found in the complete Product Requirements document

Administration

Improvements

Epic name	Epic description
Administrative users — Dashboard improvement	The administration dashboard suffers from design and user experience flaws incompatible with current modern supports used by our customers. This epic aims at bringing quick and opportunistic improvements to help improve user experience in short delays - Add filters on document list - Improve font contrast - Download all documents at once
Administrative users — New collection process improvement	The administration new collection form suffers from design and user experience flaws

	- Add a cancel button - Responsive from - Rise document size limit - Change signature area size - Sign with name - SIgn with uploaded signature - Add a handwritten drawing signature system - **Show advanced options in recap**
Administrative users — New collection process improvement	The administration new collection form suffers from design and user experience flaws - Add a cancel button - Responsive from - Rise document size limit - Change signature area size - Sign with name - SIgn with uploaded signature - Add a handwritten drawing signature system - **Show advanced options in recap**

New Features

Epic name	Epic description
Administrative users — Onboarding	As a new administrative user, I would like to be better guided on how to use the application
Administrative users — Contact management	As an administrative user, I would like to create and manage contact books. Contact books will help users. This feature will allow users to more easily and quickly add signatories to documents. This is a feature that is very useful for people who use document sending extensively - Create a contact book

	- Delete a contact book - List all contact in a contact book - Filter contact by name - Create and manage contact books - Share contacts between users - Import contacts from a CRM - Import contacts from Google - Import contacts from HRIS - Automatic synchronization of contacts
Administrative users — Workflow management	As an administrative user, I would like to create and manage flexible workflows with automatic sending, notification, and alerting processes. This feature will strongly help me reduce my workload. as we use very dense and complex validation processes involving multiple stakeholders
Administrative users — Workspaces and bundled accounts	As a manager, I would like to create workspaces and manage accounts of my co-workers. This includes access, security, and permissions
Administrative users — Cloud system integration	As a user, during a new collection process, I would like to import my document from my favorite cloud provide

Final User

Improvements

Epic name	Epic description
Final Users — Security and email reliability improvement	Emails sent to the corresponding signatories do not have all the required visual and technical security and reliability features. The negligence can be damaging to the treatment processes made by the recipient email provider

	or end up being considered as a phishing email by mistake by the signatory - Provide signed and valid certificate - Add a DKIM signature - Add a DMARC feature
Final Users — Web portal signing process improvement	This epic is aimed at improving the current overall signing process - The SMS code should have a limit time validation - Improve the signature visual in the signed document on the mobile version

New features

Epic name	Epic description
Final Users — Security and email reliability improvement	Emails sent to the corresponding signatories do not have all the required visual and technical security and reliability features. The negligence can be damaging to the treatment processes made by the recipient email provider or end up being considered as a phishing email by mistake by the signatory - Provide signed and valid certificate - Add a DKIM signature - Add a DMARC feature
Final Users — Web portal signing process improvement	This epic is aimed at improving the current overall signing process - The SMS code should have a limit time validation - Improve font contrast - Provide earlier the refuse to sign button

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Prioritization

Candidates

As a prioritization sorting technique, we will rely on a Value / Complexity framework.

Quick Win	Big Bets
- Final Users — Security and email reliability improvement - Final Users — Web portal signing process improvement	- Administrative users — Contact management
Maybes - Administrative users — New collection process improvement - Administrative users — Dashboard improvement	

Final decision

In this scenario I have been asked to only select 1 epic by case and 1 user story. The selected are available below. For more details about user stories, please refer to the corresponding backlog section.

Administrative Users

Epic	Reasons
Administrative users - Contact management	While doing my market and user research, I found that managing a list of contacts is definitely one of

	the **most important asked features** by users. It helps save time and highly improves the user experience while making the user very **happy** to use such a useful service. As **our goal is to improve our retention**, this epic is definitely a good choice

User Story	Reasons
Admin User - Create a new contact book	As this is a new feature, the first step will be to provide the **most valuable version** of our features. It will also help assess our initial hypothesis with low-cost effort

Final Users

Epic	Reasons
Final Users - Web portal signing process improvement	The current process is quite good. However, we could do better and this epic will help improve our user experience quickly with little effort

User Story	Reasons
Final user - Provide earlier refuse to sign button	This story will be very interesting to users who need to sign multiple documents for a single case. As this is a highly widespread case, its impact will be significant, making it a good candidate. Moreover, the development cost and risks will be minimal.

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Roadmap

Backlog

In this section you will get access to detailed selected user story tickets. I added some comments to make it more appealing and immersive. Each sentence has been selected to tone right with how exchanges turned with developers. They are very friendly people and fans of pop culture. My communication is made to fit their attitude. And as a technical expert who worked as a developer, It's more my everyday attitude, more than a tactical communication posture :)

Administrative Users

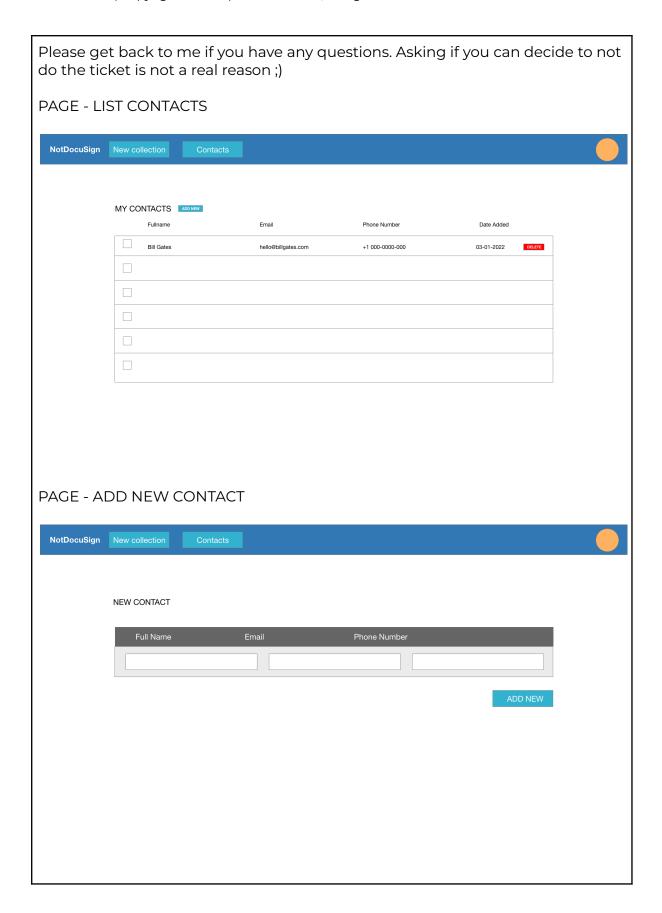| ▾ Title ▾ |
|---|
| **Admin user - Create a new contact book** |
| ▾ **Related epic** ▾ |
| *Administrative users - Contact management* |
| ▾ **Description** ▾ |
| As an admin user, I want to be able to create a default contact registry to store a list of contacts to whom I would like to send documents for signature.

Note to @devteam

@devteam As you will be working on this ticket be aware that our final goal will be to give users the power to create and manage several books later. So make sure to technically design your solution with this information in mind to reduce the technical debt ;) |
| ▾ **Assets** ▾ |
| @devteam Hi young padawan :) As promised, below are the mockups I made with the product designer. You will find the "List page" and the "Add Page". |

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Please get back to me if you have any questions. Asking if you can decide to not do the ticket is not a real reason ;)

PAGE - LIST CONTACTS

| NotDocuSign | New collection | Contacts | | ● |

MY CONTACTS   ADD NEW

	Fullname	Email	Phone Number	Date Added	
☐	Bill Gates	hello@billgates.com	+1 000-0000-000	03-01-2022	DELETE
☐					
☐					
☐					
☐					
☐					

PAGE - ADD NEW CONTACT

| NotDocuSign | New collection | Contacts | | ● |

NEW CONTACT

Full Name	Email	Phone Number

ADD NEW

Final Users

▾ Title ▾

Final User - Provide earlier refuse to sign button

▾ Related epic ▾

Final Users - Web portal signing process improvement

▾ Description ▾

As a user receiving a signature request, I want to have access to a button that allows me to refuse to sign a document as soon as I have read it and not having to continue through all the process to get actions to that option.

Extract from the user feedback

"To refuse to sign a document, after having clicked on "VIEW AND SIGN DOCUMENTS" in my email, I must then validate the document (checkbox) to get access to the 'refuse to sign' button. It's very disturbing and annoying."

▾ Assets ▾

@devteam Hi the genius team :) Below is an image from a screenshot, in which you will find a proposal location where I think it will be suitable to add an earlier "Refuse to sign CTA". I am aware that this can have an impact on the back-end workflow. But as we discussed earlier, it still can be made during the incoming sprint.

Please get back to me if you have any questions ;)

ACCEPT THE DOCUMENT

Accept   Refuse

Electronic signature service operated by ████, a Qualified eIDAS Trusted Service Provider.