



SECURITY & PRIVACY INITIATIVE PRD

"We envision a world where effortless, secure video conferencing is the standard, enabling individuals and organisations to achieve their goals with ease."

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Vision and Product Principles

Vision

"We envision a world where effortless, secure video conferencing is the standard, enabling individuals and organisations to achieve their goals with ease."

Product Principles

- **Users First.** We have our users' best interests in mind at all times.
- **Simple and Accessible.** We want it to be easy to use and inclusive for all.
- **High Quality and Reliability.** We don't sacrifice quality for shortcuts.
- **Security and Privacy.** We aim to earn absolute trust from our users.

Problem Statement

Users of Sync who are part of our **enterprise tier** (our most significant source of revenue) are facing data and security breaches, using unsustainable workarounds and resources because they **lack control over their meetings**.

As a result, organisations, agencies, and institutions are looking for safer and more trustworthy alternatives to Sync, leading to an **annual loss of 6%** of our paying customers.

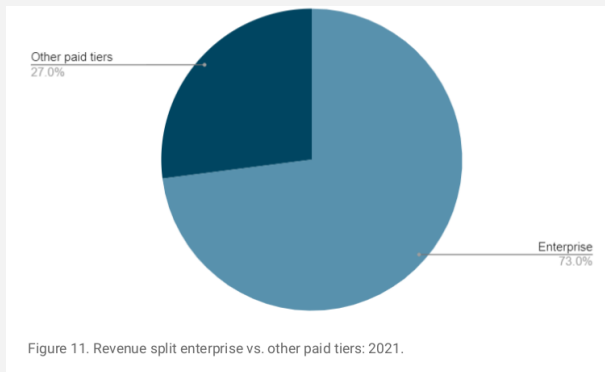
Pain Points

- There are disruptions during meetings from uninvited participants
- Organisations cannot control who joins the meetings
- Unused screen sharing features due to unauthorised screenshots by such participants
- Loss of trust due to highly sensitive data breaches
- Needing dedicated people for running meetings workarounds

Product Audience

This problem affects all of our user base, but according to the received feedback in research, **users from our top tier subscription** (organisations, government, academic institutions) are the ones most concerned with privacy and security. Many deal with highly sensitive data, and it's in their best interest to use tools they absolutely trust. This affects **73% of our paying users**.

46% of the enterprise users are from Academic Institutions and Government Agencies (they care more about privacy and security).



Persona Spectrums

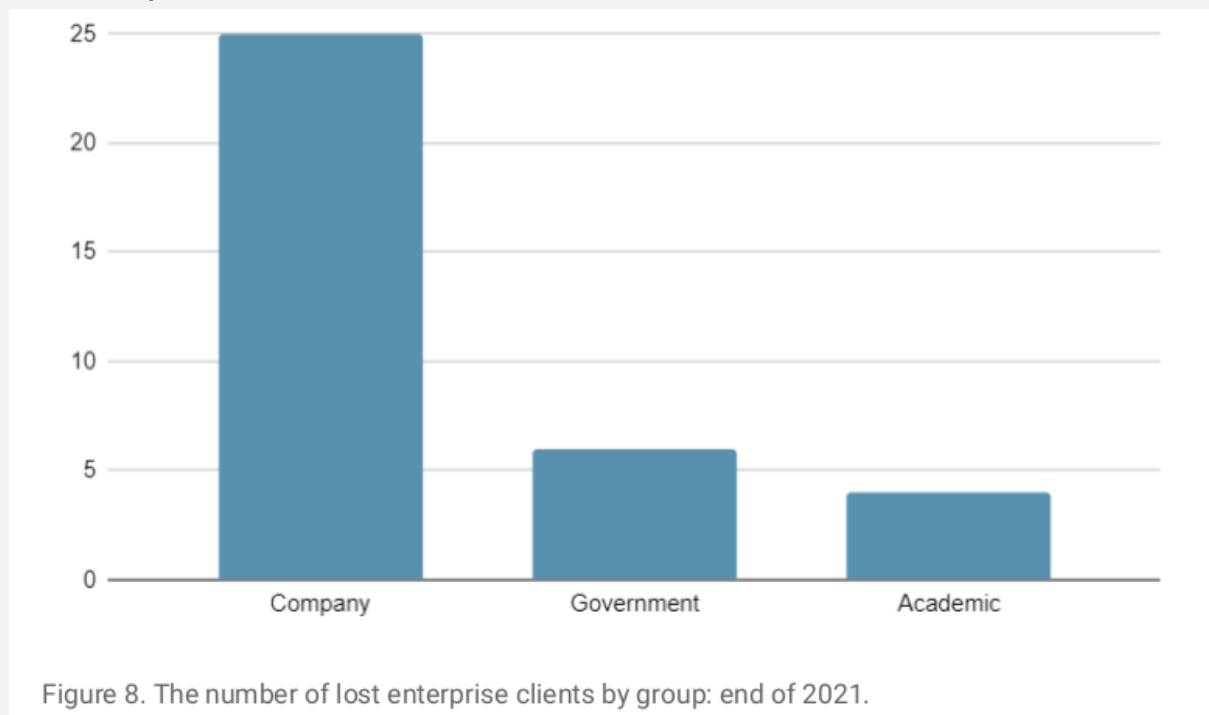
Permanent	Company User using Sync every day	May want to use Sync daily to attend meetings and conferences. Collaborate with colleagues. Possibly quite tech-savvy. i.e. daily standup
Temporary	Government User using Sync to help someone through the process	May want to use Sync during a determinate amount of time while they help someone in need. i.e. with their passport renewal
Situational	Academic User (teacher) will use Sync to communicate with parents	May want to jump on a video call with a parent who needs an update on their child's progress.

All these users are dealing with extremely sensitive information and cannot afford data breaches.

Solution Justification

We should prioritise this problem to **avoid losing our largest paying customers**, which will be a big hit on our business. Currently, 73% of our paying customers come from the Enterprise tier, which generates most of our revenue. We have to regain the trust of these users, meet their expectations and make them feel listened to. This way, we avoid losing them to our competitors and make them happy.

Of those 73%, **46% of the users are from Academic Institutions and Government Agencies**, who will not think twice about Security and Privacy, before seeking more trustworthy tools.



As we can see, we already **lost 6% of our clients** since the beginning of the year, where 5% of those come from **Academic Institutions and Government Agencies**.

It also helps us to have **everyone focused and aligned** within the company. Providing a **clear direction** for our employees, regaining their trust.

To **align** our product with our **Vision**.

Objectives and Measures of Progress

OKRs

Objective 1: **Enhance Meeting Security and Control**

- ☐ Key Result 1: Achieve a customer satisfaction rating of 4/5 or higher for government and academic users, as measured through regular surveys.
- ☐ Key Result 2: Maintain a customer satisfaction rating of 4/5 or higher for company users, as measured through regular surveys.

Objective 2: **Minimize Unsustainable Workarounds**

- ☐ Key Result 1: Reduce the percentage of enterprise users resorting to unsustainable workarounds by 50% over the next six months.

KPIs

KPI 1: Customer Satisfaction Score

We can track our satisfaction scores through surveys and interviews.

Stakeholders

Rafa CEO, Founder (he/him)

Fiona CTO, Founder (she/her)

Gen Head of Design (they/them)

Andrea UX Researcher (she/her)

Yi Junior Engineer (she/her)

Market Research

Research Goal

The primary goal of this User Research, through a combination of interviews and surveys, is to gain a deep understanding of our users' needs, expectations, and pain points.

By engaging directly with our user base, we aim to validate our proposed solutions, ensuring that these align with the users' expectations and enhance their experience.

During this research, we prioritised two assumptions.

Assumption 1

"We'll lose more enterprise clients from not implementing the enhanced permissions feature than from performance problems."

High Value: If this assumption is correct, and we focus on the enhanced permissions feature, it has the potential to bring a lot of value, causing users to stop looking for alternatives, helping them to avoid using workarounds, and increasing overall satisfaction.

High Damage: If this assumption is incorrect and we implement the enhanced permissions feature, we will risk losing more users due to the continued performance issue.

Why prioritise this assumption?

I chose to prioritise this assumption based on the results from assumptions 2 and 4, as well as this being my two main choices for the previous Problem Statement, as these seem to be our two biggest concerns at the moment. As we can see in the value-damage quadrant, this assumption has a potential value higher than assumption 4.

According to our research data ([here](#)), in Figure 7 (Bugs/incident report occurrences: 2021), we can see a high incidence report for the enterprise tier, which can tell us that these types of users might be more concerned with performance issues. We also know, from Andrea's research, that these types of users have more stringent guidelines for sharing information.

Many clients are leaving Sync for competitors; finding out if it's due to performance issues or the lack of enhanced permissions would be helpful.

Research Plan

Research Statement

We aim to confirm enterprise users will not stop using Sync if we implement the enhanced permissions feature.

Questions

- How critical is the enhanced permissions feature for our enterprise clients compared to performance improvements?
- What is the impact of performance problems on client satisfaction and retention?
- Do the government and academic users prioritise enhanced permissions over performance?
- How do competitor offerings in terms of enhanced permissions impact our client retention?

Results Criteria

- The assumption is correct if over 65% of our enterprise clients find the permissions feature critical.
- The assumption is incorrect if more than 80% of the enterprise users find the performance problems more impactful.
- The assumption is correct if over 55% of our government and academic users find enhanced permissions the priority.
- If 70% of our users consider leaving us for competitors offering enhanced permission, we'd consider the assumption to be true.

Research Method

- We'd conduct user interviews and surveys.
- We'd also want to check out our competitors using Competitor and Market research.
- We'd want to do some Impact-Effort Analysis.

Assumption 2:

"Government and academic clients will continue to use our product after the COVID-19 pandemic."

High Value: If this assumption is correct, we will keep our user retention and not suffer a high decrease in our revenue.

High Damage: If this assumption is incorrect, the damage will be considerable as these clients make up 46% of our enterprise users. We can potentially lose almost half of our highest paying users for reasons outside of our powers.

Why prioritise this assumption?

I find it highly important to prioritise this assumption, as this group makes approximately 33% of our total revenue. And they are 46% of our enterprise users.

[[Check Report](#) for reference, Figures 10 and 11]

The impact of losing this amount of users will be very high on Sync and would make us more careful in catering to the specific needs of these types of users. These clients will likely return to offices once the pandemic is over and will not need conferencing tools.

Research Plan

Research Statement

The aim of this research is to determine if users (from academic and government backgrounds) will continue using Sync after the pandemic is over.

Questions

- How do government and academic clients see the future relevance of Sync in a post-pandemic world?
- What are government and academic clients' specific needs and use cases in using Sync during the pandemic?
- What strategies can we implement to retain this type of client after the pandemic?
- How does the potential loss of government and academic clients align with our revenue and user retention strategy, and how do we plan to mitigate that?
- What is the rough timeline for government and academic clients returning to in-person work or classes, and how do we fit in that timeline?

Results Criteria

- If 70% of government organisations and academic institutions continue to support remote work and online learning even after the pandemic, the assumption is correct.
- If 90% of government organisations and academic institutions fully return to in-person work and classes, then the assumption is incorrect, and they would stop using Sync.

Research Method

- User interviews and surveys.
- Financial impact analysis.
- Assessing the impact of remote work policies or changes in educational practices.
- Expert consultation.
- Case studies analysis.

Research Findings

- Regular complaints around privacy and security (Government and Academic users).
- Enterprise users report more bugs and incidents.
- Government clients grew by 13% since 2019.
- Academic clients grew by 11% since 2019.
- But Company clients shrank by 24% since 2019.
- Lower tiers than Enterprise users are more satisfied with the product.
- Satisfaction Enterprise: $\frac{2}{5}$ (Academic and Government) vs $\frac{4}{5}$ (Company).

Insights

- **Government and Academic clients** regularly **report issues related to privacy and security**, as highlighted in Andrea's research data. These users are dissatisfied with the current product due to concerns like uninvited users disrupting meetings and sharing private content. This highlights the need to address these specific pain points to retain and attract these user segments.
- The data shows that **Enterprise users report more bugs and incidents** compared to lower-tier users. This could be attributed to the higher expectations of Enterprise clients who pay premium prices for the service.
- A noticeable pattern is the **increase in Government and Academic clients** in the years following the COVID pandemic. This indicates that the pandemic may have accelerated the adoption of this product by these specific user groups, possibly due to remote work and educational requirements.
- The data shows a **notable shift in the types of enterprise clients** over time. Government and Academic clients have been growing steadily since 2019, with Government clients increasing by 13% and Academic clients by 11%. In contrast, Company clients have decreased by 24% during the same period.

Product Improvements Validation

Reach x Impact x Confidence = RICE SCORE

Effort

Insight	Reach	Impact	Confidence	Effort	Total
Security and Privacy Concerns	73%	3	100%	6	3650
Higher Bugs and Incidents reports in Enterprise Tier	73%	2	50%	5	1460
Post-COVID Client Surge	46%	1	80%	2	1840
Shift in the Client Base	73%	0.5	60%	2	1095
Satisfaction Disparities	46%	0.25	90%	1	1035

Percentage of clients 3=Massive Impact
2=High Impact
1=Medium Impact
0.5=Low Impact
0.25=Minimal Impact

100%=High Confidence
80%=Medium Confidence
50%=Low Confidence

In Persons per Week

miro

We prioritised these insights using the RICE method and concluded that we wanted to focus on the Security and Privacy concerns, which validated our Problem statement.

Solution and Product Requirements

Hosts can create different types of meetings with different levels of access permissions.

Types of meetings examples:

- Open Access
- 2FA or code
- Invited users only

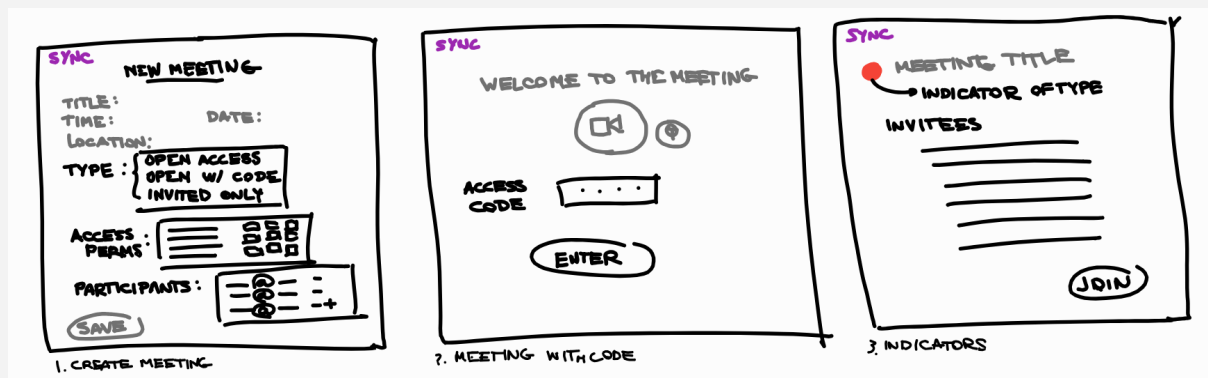
Function Requirements

- The type of meeting solution shall be available to enterprise customers so there are no disruptions during their conference calls.
- Hosts shall be prompted to select the desired meeting type and access permissions when scheduling a new meeting so they feel safe and sound.
- Participants shall be notified of the access control type when they receive an invitation, ensuring clarity regarding meeting restrictions.
- For "open access" meetings, the system shall allow anyone with the meeting link to join without additional authentication.
- For "2FA or code" meetings, the system shall provide options for two-factor authentication or a meeting access code, ensuring the secure entry of only those with access.
- For "invited users only" meetings, the system shall ask the host to provide a list of participants.
- The system shall allow hosts to customise access permissions for each meeting type, specifying who can join, view content, and participate.
- The system shall display icons or indicators next to each meeting type to distinguish them in the meeting schedule.

Questions

1. Should this types-of-meeting solution be available ONLY to enterprise customers?
2. How do we measure the success of this solution?
3. What are exactly the types of meetings?
4. What are the exact access permissions?
5. What 2-factor authentication can we use?
6. What would a Government or Academic user expect from this solution?
7. Should the 2FA or code be specific to the meeting or unique to each participant?
8. What indicators can we use for each type of meeting?
9. Should the list of participants for invited users only be editable? Should it be email-based?
10. How are the users notified about the type of meeting? Would this be too verbose?
11. What are the default values of the access permissions?

Wireframes



Launch Planning

2 weeks	1 week	1 week	1 day	2 weeks +
Validate the Problem Statement <p>Conducting user research, through surveys and interviews with users from our Enterprise tier. <i>(Product team)</i></p>	Solutions Ideation <p>If the problem statement is validated, ideate on possible solutions. <i>(Product and Engineering, Customer Support)</i></p>	Scoping and KPIs <p>Decide what's important and what can wait. Setting up measurements for success. <i>(Product, Engineering)</i></p>	Set Objectives and Milestones <p>Setting up clear and measurable goals with milestones to have everyone aligned. <i>(Product, Engineering, Marketing, Customer Support, Sales)</i></p>	User Stories and Delivery <p>Break up the solutions into user stories and start the design and development processes. Possibly several sprints needed. <i>(Product, Engineering)</i></p>