Sync

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."

Marius Avram (PM)
November 2023

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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).

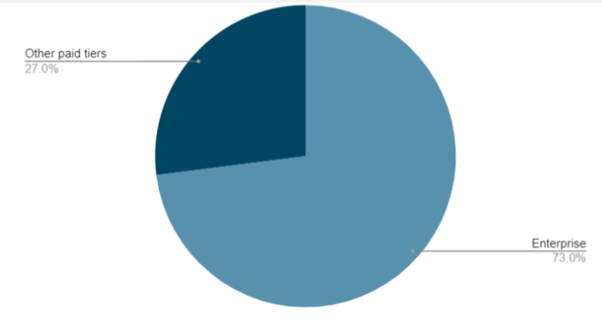


Figure 11. Revenue split enterprise vs. other paid tiers: 2021.

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.

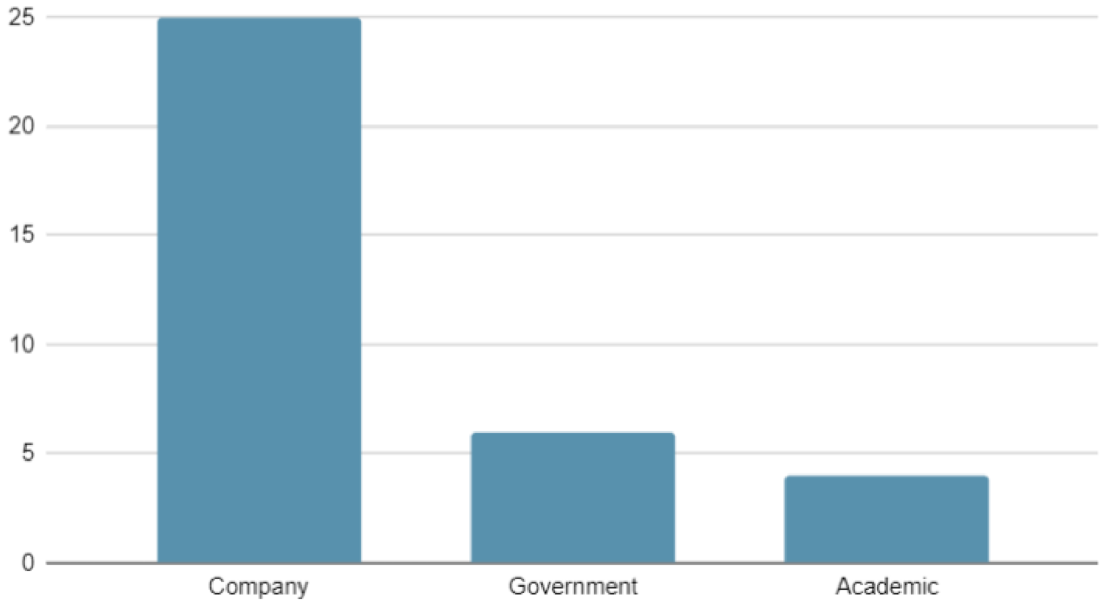


Figure 8. The number of lost enterprise clients by group: end of 2021.

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 ⅘ or higher for government and academic users, as measured through regular surveys.
- [ ] Key Result 2: Maintain a customer satisfaction rating of ⅘ 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: ⅖ (Academic and Government) vs ⅘ (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

$$\frac{\text{Reach} \times \text{Impact} \times \text{Confidence}}{\text{Effort}} = \text{RICE SCORE}$$

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

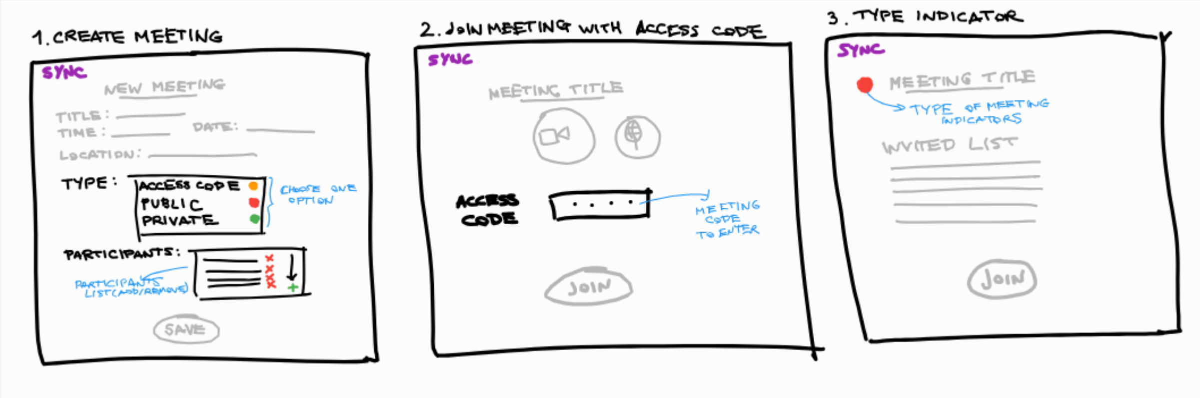
Function Requirements

- 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



Usability Tests Iterations

Test Plan

Type of Test: Remote/In-Person Moderated Test using Sync.
Why: Compared to in-person studies, it's often less expensive, less time-consuming, and more convenient for participants. In cases where participants can't travel to a testing location, remote moderated usability testing is an excellent alternative.
Tasks:
Same tasks as in the previous test were performed by testers.

1. As part of your job (a company involved in climate change activism) you have to create a meeting to give a webinar about trash in rivers. Anyone can join your meeting without restrictions.
2. At work (you work at a government institution) you need to organise an emergency
meeting to talk about very sensitive data that not everyone at the company is allowed to know, so your meeting has to be secure. Once the meeting is created join it. When you join the meeting you realise someone important to the topic to be discussed was not invited and they cannot access the conference call, add them as a participant directly in the meeting. Leave the meeting when you're done.
3. You work as a teacher, you are organising a remote meeting with parents to inform
them of the construction of a new cafeteria. Some of the parents don't have emails or Sync accounts, but they should be able to attend. But the meeting should not be public, not everyone can join. You you need to print out some instructions for them on how to access the meeting. Copy what necessary info you need from the Created Meeting page to paste later in the instructions document.
4. To inform yourself, you want to check if the next two meetings you are part of today are restricted or you need an access code. In your meetings list for today, you see Rafa organised a meeting "Sync in Academia" you are interested in and you want to attend. Join the meeting.

First Iteration Results

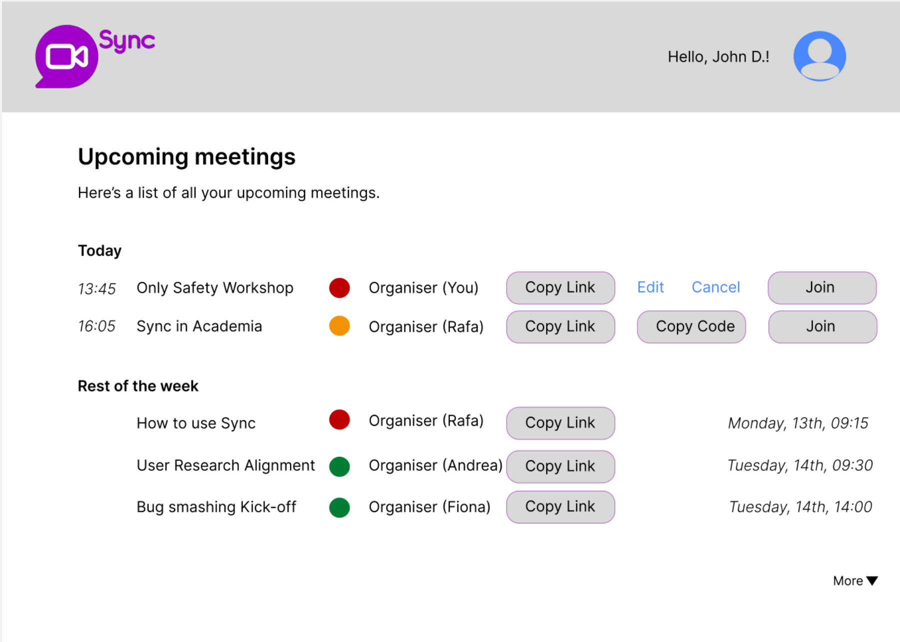
Negatives:

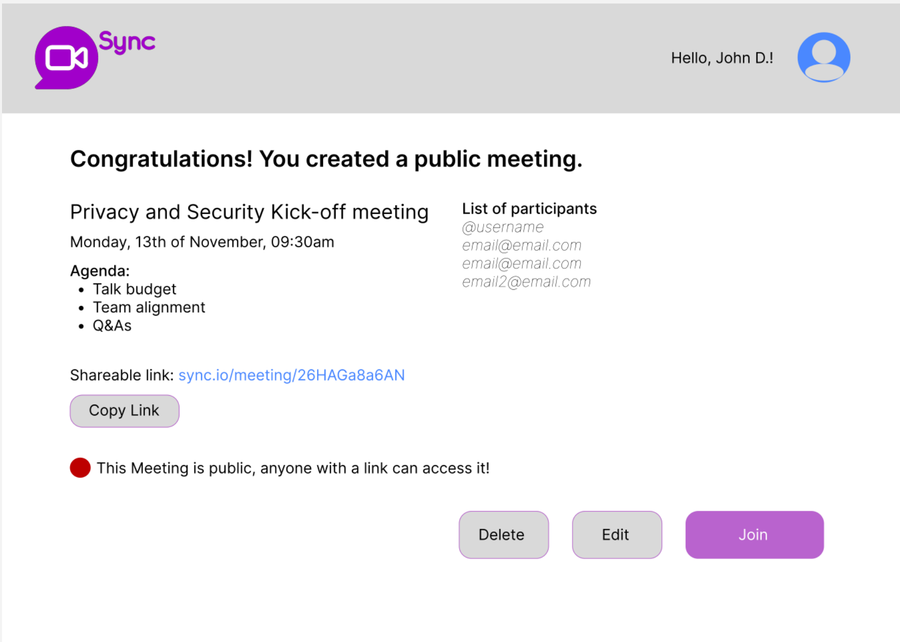
- User was confused about the dropdown for the type of meeting (when selected it created the meeting, this was due to using the free version of Figma).
- It was not very clear what the indicator were there for, as they did not find it very visible in the "Created meeting screen".
- Everything happened a bit too fast when I selected the type of meeting.
- The adding participant part of the task was a bit confusing. Was not very clear if the input was for a new user and the button being connected to it.
- Indicators were not very clear, as it did not register from when I created the meeting what colours meant. Maybe use words instead?

Problems To Solve	**Proposed Solutions**
Traffic Light indicators in the Created Meeting and Meetings List are confusing.	- Legend of the traffic lights meanings in the Meetings List. - Brighter colours - Link words to the indicators in the Created Meeting page by highlighting the words in the same colour and the indicator and making them bold.
Finding meeting list can be confusing	- Add a quick way to go to the meeting list page from the profile or nav bar.
Adding participants within the meeting is confusing	- State clearly that the input and button are part of the participants section. - Better labeling.
Prototype Confusion - When adding a user within a meeting everything happens too fast.	- Adding user step should have a notification that the user was invited, then there should be a delay until the user is added to the call.
Prototype Confusion - Some things are happening too fast, clunky prototype	- Better explanation to tester what a prototype is. - Improve prototype connections and add extra overlays.

A/B Prototypes

A [(link to clickable)]



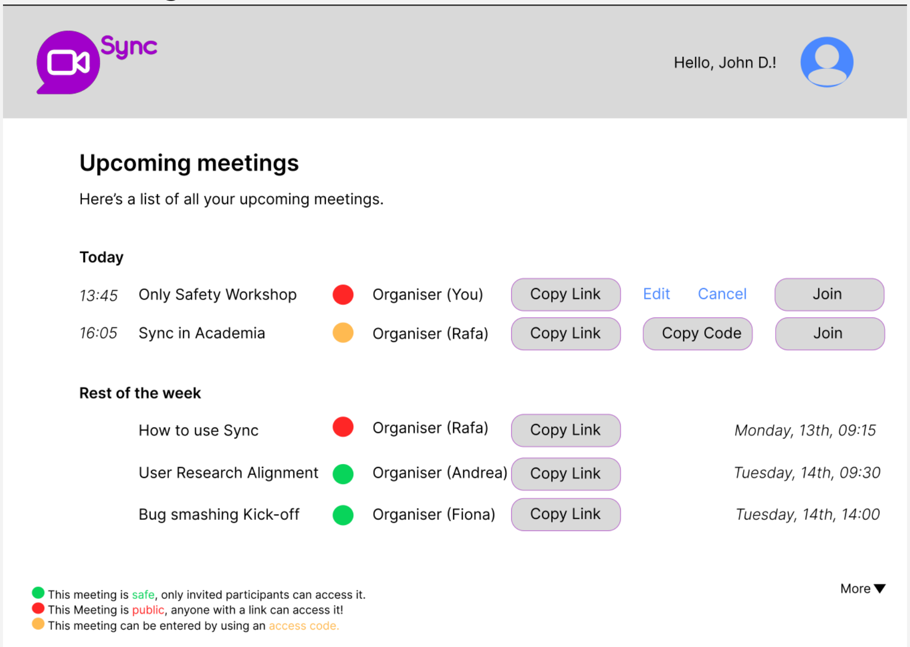


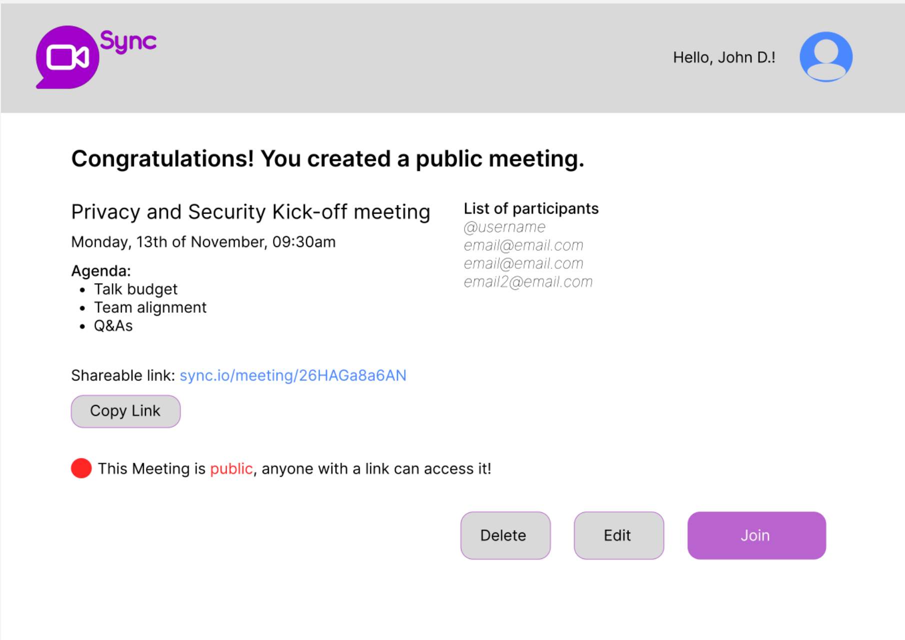
B [(link to clickable)]()

I decided to focus on the **"Traffic Light indicators in the Created Meeting and Meetings List are confusing."** issue from the original test.

Legend of the traffic lights meanings in the Meetings List was added to the B prototype. Indicators have brighter colours in the B version of the prototype.

The clunkiness of the prototype was improved to avoid distractions from the goal. Extra frames were added, and the connections were better. It was a functionality improvement rather than a solution change.





A/B Test Findings

Negatives:

- If you start from the very first screen, there is no “My Meetings” button
- I had to go through a “fake meeting” to get to the “My Meetings” option to look at them. Once you got to that point, you could see the meeting the task told you to go to and you were able to join.
- Confused by the add button. Had to explain it is for new participants.
- Asked for the indicator and its meaning.
- Indicator not clear enough, not remembering each colour.
- Confused about the list of participants being there for “public” type of meeting.
- Adding a participant directly in the meeting was a bit confusing. Maybe a label for the input and button would help.
- Thought the button for inviting a new user will take them to a new step (i.e. pop up)
- Confused if participants from the invited list also need a code or can access the meeting directly.
- Did not think of the indicator next to the meeting in the list. Only knew the type of meeting by the “Copy Access Code” button.
- Did not know what the colours of each indicator meant, but the legend was useful.
- Legend was useful but felt too crowded.
- Found the duplication of information of the indicators a bit too much. Makes the page too distracting.
- Wondered of the use of green/red and colour-blind people and contrast of the coloured text.
- It could be more accessible.
- Asked why is an access code needed if emails or usernames can just be added to the participants list.
- Felt a bit overwhelmed by the information.
- Things did not feel consistent on the page.

Taking into account the A/B test data I am confident the B prototype is a positive in the right direction. It seems to mostly solve the problem of unclarity of the indicators, but there is a need to iterate on this solution again. Overall the feedback was good, there were some good suggestions and some important issues were highlighted.
Some accessibility issues were discovered that were not taken into account: chosen colour, some low contrast, and using only indicators without text or alternative text. This should be by default.

Indicators in the meetings list page are useful and the legend is useful too, but makes the page feel too crowded. Instead of a legend, each indicator should be accompanied by a short text explaining its meaning (key words). Indicator + keyword

I would go back to the drawing board, improve the prototype, and do another A/B testing using the current B prototype vs the B prototype with some of the improvements.

I would use Sequential Testing using the current B prototype as “original” and test it against several other options.

MVP

We decided to use the **Fake Door MVP approach**, we will create a high-fidelity prototype but will tell the users it is not the real deal, which allows us to test this new feature while avoiding disappointing our users by letting them think that the feature is already there. By being transparent, we are hoping to learn a lot more from our users regarding the Types of Meeting feature.

Solution & Success Criteria

The MVP will simulate the choice of a type of meeting and functionality depending on the type, as well as show indicators for each type of meeting.

We expect to test it with users from Government and Academic institutions and it will prove **successful if the satisfaction score of the test is ⅘ or bigger**, which will be surveyed at the end. We will also run an interview after such a test where we will ask more open questions regarding this new feature.

We will compare the findings with our assumptions and previous data to check if the retention will potentially increase.

Assumptions & Risks

Assumptions

1. Will will increase user satisfaction by adding 3 different levels of privacy for a meeting.
2. We will increase retention if users are able to create secure (only invited users can access the meeting) meetings.
3. Users need some help with knowing what the indicators mean.
4. Each type of meeting is self-explanatory and doesn't need further information than the one provided.
5. This feature will add value for all our users, not only Government and Academic users.

Risks

1. The introduction of choice for the type of meeting might introduce confusion among less tech-savvy users coming from Government and Academic institutions; they might not be able to understand the differences between the three types or might share private data in a public meeting.
2. The indicators might not prove as helpful as we thought to mitigate the share of private data during a public meeting.
3. The solution might need more time to be adopted by everyone, risking the loss of more clients to competitors.

Mitigation Strategies

1. We write very clear documentation with very simple examples of use cases for each type of meeting. We also have the indicators be clear when joining the meeting and

during the meeting, warning users (depending on the type of meeting) not to share sensitive data depending on the privacy level. This will help users feel confident in using the features and avoid known issues.
2. We add text next to the indicators and explain clearly what they mean and make it present to the users at all times.
3. We run webinars on privacy where we showcase this feature to our clients, as well as mention it in newsletters, social media, and even a banner on the home page to make everyone aware that they can create private meetings from now on.
4. We will closely monitor user satisfaction and user interaction with this new feature, measuring the use of each type of meeting.
5. We will make the private meeting the default type to inspire confidence in our users so they do not have to use extra steps. That will be aligned with our Vision.

Team

For the fake door MVP we will rely heavily on the designer team, after the Developement team delivered the Proof of Concept for this feature. The assigned designer will use existing (up to date) Figma mocks of the Sync app to deliver a clickable and seamless MVP, which we can use.

- **Product Manager:** I will coordinate and work on the strategy for delivering and testing this MVP
- **UI/UX Designers:** The Design team will create the high-fidelity prototypes for this feature, they will ensure the design is in line with our current product and it's easy and digestible. Andrea will work on this and Gen will oversee.
- **Development team:** They will make sure the MVP is in line with the Proof of Concept they worked on, and there are no unfeasable additions. As Yi worked on the prototype, she will coordinate and oversee the MVP.
- **Usability Testing:** The whole team will participate in the Usability interviews, to identify any area open to improvement. But Andrea and I will be coordinating everything.
- **QA:** We are all going to QA this MVP to ensure the quality is the best before starting to test it with customers.
- **Finance:** We will need Rafa, Fiona, and/or the Finance department for budget approval.
- **Sales & Customer Support:** We will work closely with these two departments as they work the closest with our customers. They might be able to provide us with Users for our usability test.

Timeline

Now	Next	Later
- Coordination with Development team regarding what is feasible for the MVP (based on the Proof of Concept they worked on). - MVP planning, strategy, and scoping. - Reach out to potential tests from our user base (focusing on Government and Academic users, focus on unsatisfied users). - Budget approval.	- Creation of the MVP. - In house QA of the MVP and finalised version - Test MVP with users and monitor their behaviour, interview them, and gather data and insights. - Survey for user satisfaction.	- Analyse data and insights. - Present findings to stakeholders. - Based on the findings, plan the development and delivery of the features to end users. - Monitor closely the feature, retention, and the user satisfaction from Government and Academic institutions.

Budget

120 person hours alotted for coordination, MVP creation, testing, etc.
Tools:

- *Sync:* All features for free
- *Google Workspace:* Business Standard Plan $12 USD per user / month
- *figma.com*: Organisation Plan €45 per editor/month
- *lyssna.com*: Pro Plan $175 USD/month (extra user testing)
- *typeform.com*: Business Plan 75 EUR/mo

Launch Planning

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