



Focusing on key product features to accommodate a surge in new user engagement.

Product Management Case Study by Curtis Schmidt


Product Scale: 3 Months

Primary Stakeholder: Career Foundry Product Management Immersion Course

Skills/Methodologies: Brainstorming, Agile, Stakeholder Mngmnt., Lo-Fi Wireframing, Prioritization, Data Analysis, Prototyping and Testing, and Launch Preparation

Tools: Miro, G-Suite, Slack, Premiere.

THE COMPANY

 **SYNC:** video meeting collaboration tool available on PC, Android, and Apple Devices

Monthly Active Users: Currently 500 million (1 month ago, it was 100 million)

Revenue Source: Tiered subscription model (i.e., offering different levels of service for different prices). This includes:

- A free tier with limited features;
- A low-cost tier with limited features (limited number of users and calls per month);
- A high-cost tier with all features (unlimited users and calls);
- An enterprise tier with special business features (concierge customer service, custom branding).

Top Competitors: Google Meet, Zoom, Microsoft Teams, GoToMeeting

BACKSTORY: A large part of Sync's revenue comes from its enterprise users making up over 1/3 of its profit base. These users comprise of largely academic and government employees ranging in age from 25–60 across all tech literacy levels. The company recently experienced amazing growth in this area going from 100 million to 500 million over the course of 1 month. But these are the same users that are complaining most about bugs and feature requests. According to data from the end of 2021, Sync had lost approximately 6 percent of its total clients since the start of the year. Around 2 percent being government clients, and 3 percent being academic clients.

OBJECTIVES

GOAL

The goal was to address the top two issues faced by Sync's enterprise subscribers in academic and government occupations, that represented the company's largest profit group. These 2 objective boxes will appear on slides that pertain to what objective the process was applied to.

Objective 1

Help enterprise users experiencing technical issues and platform downtime to find quick solutions.

Objective 2

Enterprise users seek improved permissions for virtual meetings, enabling control over entry and sharing permissions during ongoing sessions.

PROCESS

My first step was to meet with working professionals in the software industry to run a mock brainstorm session to define our **product principles**. Through **brainstorming and dot voting** we all agreed that whatever solution that was decided upon it would have to meet these requirements: simple, customizable, high quality, and a focus on customer support.

For objective 1, I did **user and market research** to help us define where the major issues were and brainstorm solutions. I then used **prioritization frameworks** to decide which solution makes the most sense.

For objective 2, I made **lo fi prototypes** and performed **user testing and A/B testing**. This then informed **Epics and user stories** that helped me decide on the requirements of my **MVP**, and finally figure out a comprehensive **launch plan**.

PRINCIPLES & PERSONAS

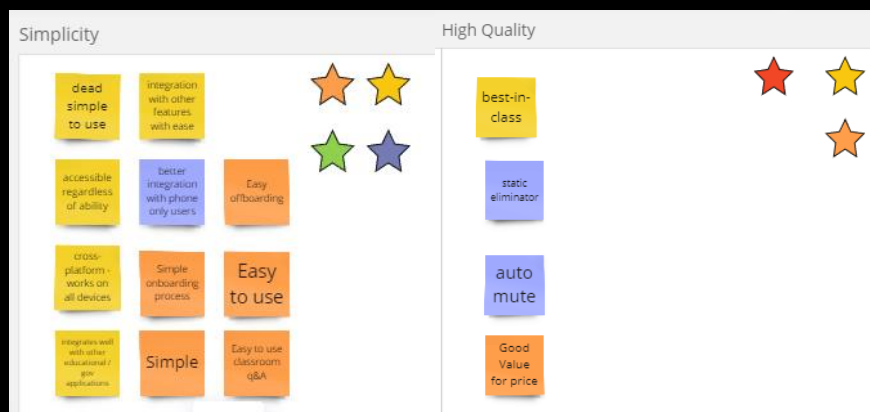
Objective 1

Help enterprise users experiencing technical issues and platform downtime to find quick solutions.

Objective 2

Enterprise users seek improved permissions for virtual meetings, enabling control over entry and sharing permissions during ongoing sessions.

I then developed personas of our enterprise users we were solving for.



Through brainstorming and dot voting we all agreed that whatever solution that was decided upon it would have to meet these requirements:

simple, customizable, high quality, and a focus on customer support.

Jeff
Occupation: High School Principal

BIO

- 45 year old divorced man.
- Feels pressure from school board to elevate test scores for district.
- Medium technology literacy.
- Advocate for students

QUOTE

"Education should be fun and engaging."

KEY TRAITS

Creative, Busy, Detail Oriented, Solution Focused, Newly Promoted, Stressed Out.

CORE NEEDS

- Easy solution to connect students for E-learning.
- Robust customer support for teachers.
- An ease of use for students and teachers.

FRUSTRATIONS

- Hates when tech problems get in way of student learning.
- Teachers and parents taking up his time with tech questions.
- Images and videos that don't load or stutter

Cindy
Occupation: Government Project Manager

BIO

- 38 year old married mother of 3.
- Enjoys the work/life balance that working from home brings her.
- She is a regular phone app user for things like weather and fitness apps.
- She has basic knowledge of how computers work, but when faced with a problem she would rather talk with IT than troubleshoot herself.

QUOTE

Computers are supposed to just work, I don't have time for this!

KEY TRAITS

Organized, Impatient, Intelligent, Hard Working, Extrovert.

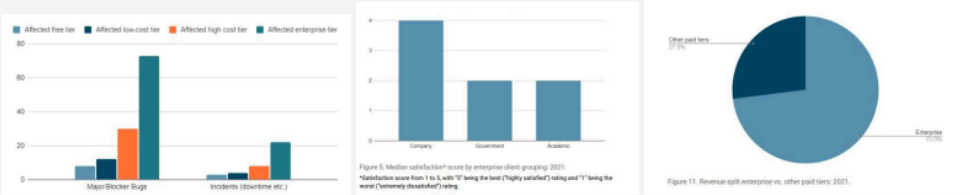
CORE NEEDS

- Minimal down time
- Help with troubleshooting.
- Instant access to files and video services over network throughout entire day.

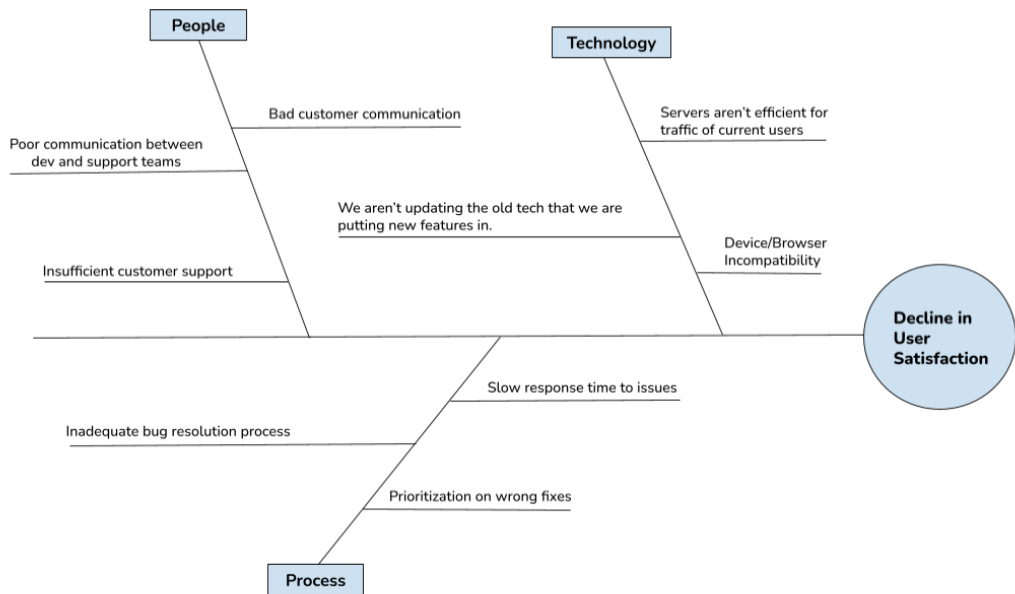
FRUSTRATIONS

- Having to figure out technology problems herself.
- Online help services that make you read through complicated troubleshooting guides.
- Platform features not ready at a moment's notice

Supporting Graphs from Project Brief:



Fishbone Diagram of Decline in User Satisfaction



I felt that we needed to further explore all the issues that could lead to the decline in user satisfaction so after analyzing it with a Fishbone Diagram it was clear that improvements could be made across the 3 areas of People, Technology and process.

After defining the causes, I ran a brainstorming session to ideate on how we could improve our customer support as well as our internal bug resolution process and after a scorecard exercise I defined our top priorities.

Customer Support		
Top Priority (14–15)	Medium Priority (11–13)	Future Focus (<10)
Live tech support	User hardware compatibility checker	User Hardware Testing
Revamp tech support article user page	Dedicated Account Mgr. Support	User Ambassador Certification Program
Allow for longer testing windows before launch	Deeper Analytics	Allow users minimal IT customization

Improve bug resolution process		
Top Priority (14–15)	Medium Priority (11–13)	Future Focus (<10)
Team Communication (daily standups and happy hours)	Deeper bot testing	Evaluate if tools we are using are optimal
Sync software across teams	Bug resolution focused team	Evaluate if we need to upgrade servers.
Check compatibility of latest rushed features.	Project and tasks tracked across all teams in software.	Implore AI to identify bug commonality.

KPIs and Metrics

Objective 1

Help enterprise users experiencing technical issues and platform downtime to find quick solutions.

In order to measure success of our new customer tech support products I outlined these as our key metrics to measure our success.

Average Resolution Time

- Define the current average resolution time.
- Set a target for the reduction in average resolution time.

Customer Support Page

- Define the current amount of users.
- Set a target for increase in user interaction.

Customer Satisfaction Scores

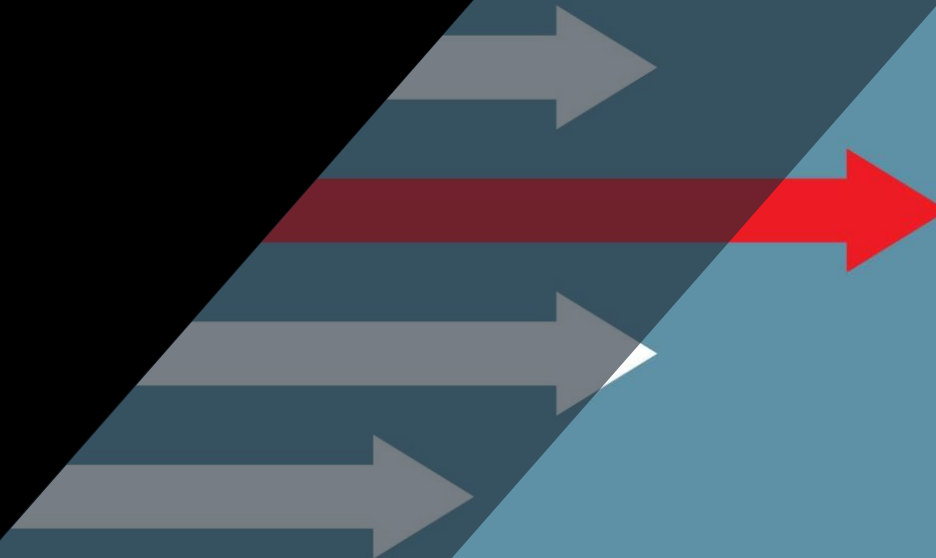
- Define the current baseline CSAT score.
- Set a target for improvement in CSAT scores.

Ticket Volume and Trends

- Define the current ticket volume.
- Set a target for reducing ticket volume over time.

Customer Retention Rate

- Define the current customer retention rate.
- Set a target for maintaining or increasing the customer retention rate.



Project Scope

Objective 2

Enterprise users seek improved permissions for virtual meetings, enabling control over entry and sharing permissions during ongoing sessions.

MVP

- **Inviting contacts** – Develop a system that allows users to search and invite both co-workers and outside participants into an in-progress meeting.
- **Sharing permissions** – Designate sharing permissions in the same step as inviting users.
- **Invited Contacts** – Create a box that will populate in realtime who the user is inviting to an in-progress meeting and allow them to un-invite as well.
- **Key Results (KRs):** We hope that this will result in an increase of overall user satisfaction scores provided by our enterprise users, as well as provide better scores to attract more enterprise users to the program.

Metrics

- Increase the amount of active users inviting participants to meetings while in a conference to 30%.
- Increase the overall customer satisfaction ratings of our current enterprise users to a 7 out of 10 or better over 2 months.
- Increase enterprise top tier subscribers by 10% over 3 months.

ASSUMPTIONS AND RISKS

The following should be considered while putting together the MVP:

- **Business Goals:** We have always strived to ensure that our products are high quality, easy to use products. In creating this MVP we need to ensure that simplicity and user satisfaction is our goal. Air on the side of simple and stable over feature rich and buggy.
- **Stakeholder Involvement:** Keep all stakeholders up to date on progress and roadblocks. User test subjects: Great care must be taken to ensure that we have a good cross section across all ages and tech literacy levels to ensure our solution will work for everyone.
- **Cross software functionality:** Ensure that the solution works with other contact and email programs to be able to fill in invitees.

TEAM

Team	Task
UX/UI	<ul style="list-style-type: none">• Create visual style for the interface of the feature that is intuitive and adheres to the company's style guidelines.
Engineering	<ul style="list-style-type: none">• Integrate features with existing backend.• Implement security protocols to keep user data secure.• Implement new features.• Collaborate with UX/UI Designers.
QA Team	<ul style="list-style-type: none">• Conduct testing to identify and fix bugs.• Perform compatibility using different contact management programs and devices.
Legal	<ul style="list-style-type: none">• Make sure that new features comply with all data protection and privacy regulations.
UX Research	<ul style="list-style-type: none">• Compile list of user test subjects and set up test dates.• Develop test session questions and run tests.• Compile data to define direction moving forward.
External Dev Team	<ul style="list-style-type: none">• Create bridge for 3rd party software

TIMELINE

Week 1-2	Week 3-4	Week 5-6	Week 7
<ul style="list-style-type: none">-Design interface-Compile user test subjects	<ul style="list-style-type: none">-Implement design into platform-Develop user test-Add functionality for 3rd party contacts software	<ul style="list-style-type: none">-QA Test and Bug fixes-Legal compliance-Conduct User Surveys	<ul style="list-style-type: none">-Compile data

EPICS, USER STORIES, & PRIORITIZATION

Objective 2

Enterprise users seek improved permissions for virtual meetings, enabling control over entry and sharing permissions during ongoing sessions.

Epic 1 Improve permissions for virtual meetings, enabling users to control entry and sharing permissions during ongoing sessions.

User Story	MoSCoW (Value)	MoSCoW Rationale	T-Shirt Size (Estimate)
Epic One			
As a user I want to be able to invite my contacts to a meeting in progress so that I can share information quickly and securely with my co-workers.	Must Have	Being able to invite people to an ongoing meeting is a base feature that our competitors have adopted and our enterprise users have been asking for.	Large
As a user I want to be able to look through a list of favorite co workers to invite to my meetings so I can invite the people I often invite in the least amount of steps.	Could Have	In an effort to provide simplicity we want to help our users have less steps to do tasks. Being able to quickly select invitees that they do often would aid greatly in convenience.	Small
As a user I want to be able to set the sharing permissions of people I invite to in-progress meetings so I can make sure that sensitive data stays secure.	Should Have	This is an important feature due to the type of data being shared by our government users. Providing a safe and secure platform is what our enterprise users have been asking for.	Large
As a user I want to be able to invite people to my in progress meetings that are outside of my contact list so I can deliver information to anyone that I need to.	Must have	Being able to invite non-employees to meetings is a very important part of what our academic and education users use our platform for. Also our competitors offer this as a base feature.	Medium

User Story	Re prioritized	MoSCoW (Value)	T-Shirt Sizes (Estimate)	Story Points (Estimate)	Justification (If descoped or not descoped)
Epic One					
As a user I want to be able to invite my contacts to a meeting in progress so that I can share information quickly and securely with my co-workers.		Must Have	Large	20	Not Descoped: This is a core feature that needs to be included to keep up with competition
As a user I want to be able to look through a list of favorite co workers to invite to my meetings so I can invite the people I often invite in the least amount of steps.		Could Have	Small	4	Descoped: This is nice to have but can wait as it is not a basic part of the functionality that needs to exist. They would still be able to invite co-workers by just typing in their email.
As a user I want to be able to set the sharing permissions of people I invite to in-progress meetings so I can make sure that sensitive data stays secure.		Should Have	Large	20	Not Descoped: This is a feature that is imperative to keeping our high tier government employees happy.
As a user I want to be able to invite people to my in progress meetings that are outside of my contact list so I can deliver information to anyone that I need to.		Must have	Medium	10	Not Descoped: Core feature that needs to be included for core functionality.

Epic 2 Develop a real-time invite box for ongoing meetings with the ability to add and remove attendees.

Epic Two			
As a user I want to be able to find answers to my technical problems quickly in a searchable help database so that I can limit downtime and time solving technical issues	Must Have	What good is our platform if no one knows how to solve the problems that arise? At the bare minimum we need to provide users with a basic database of bugs and fixes to help empower them to solve issues.	Large
As a user I want to speak to a live human to help resolve my technical issues so that I, regardless of tech literacy level will be able to find the answer to my technical questions quickly.	Could Have	This is a great value add to the customers paying top tier level subscription rates. This will also aid in creating a dialogue with these users finding out not only what they dislike but also what they like. Also having a shared dialogue will help them in feeling like they are being taken care of and aiding in rising enterprise User Satisfaction scores.	X-Large
As a user I would like to watch videos that will give help to explain how to use the platform so that I can empower myself to use features that help with my productivity.	Should have	The more helpful tips and tricks we can provide our users with will aid in them being able to solve their own issues and easing the workload of customer support.	Small

Epic Two					
As a user I want to be able to find answers to my technical problems quickly in a searchable help database so that I can limit downtime and time solving technical issues		Must Have	Large	20	Not Descoped: We need to give our users some level of help to solve issues on their own. This is that idea in its most basic form.
As a user I want to speak to a live human to help resolve my technical issues so that I, regardless of tech literacy level will be able to find the answer to my technical questions quickly.		Could Have	X-Large	30	Descoped: This is a big undertaking that we should start integrating for high tier users at some point, but with current challenges I understand it's a bit undoable.
As a user I would like to watch videos that will give help to explain how to use the platform so that I can empower myself to use features that help with my productivity.		Should have	Small	4	Descoped: We can build this out at a later date. ANot necessary to help our users solve the bug issues they are currently experiencing.

Launch Objectives

User Satisfaction Boost: We want to give our users features that they have been asking for to aid in retention and user satisfaction.

Attract more Enterprise Users: We want to increase the amount of subscription based enterprise users that are using Sync.

Stay Competitive: We need to add these features to catch up with our competitors that already have incorporated these features.

Target Audience

Our target audience is our Academic and Government Enterprise users. We have identified them to feature these traits:

- Run full range of tech literacy: minimum to max level of technical understanding.
- Ages 22–65
- Prefer simplicity over multitude of features

Targeted for This Launch

- Add functionality to our conference page that allows users to invite additional participants while in a meeting while also allowing them to set permissions for each user.

Targeted for Future Launches

- Feature that allows users to designate contacts as favorites that will then be visible in the platform “Add People” menu.
- Feature that allows invitees to edit shared meeting documents while in a meeting.
- A version without the favorites list for non-enterprise users.

Marketing Key Messages

- Easy to invite collaborators.
- Updated security and protection
- Invite anyone, anytime.
- Only for our valued enterprise users.

Communication/Advertising Channels

- Email campaign to enterprise users.
- Short video clips for Social media ads.
- Product launch announcement on website.

Success Metrics

Metric Category	Metric	Success Criteria	Owner
Adoption Rate	Enterprise Users Engagement	30% increase in the average amount of customers that use the new in meeting invitation feature over 3 months.	Marketing
Security	Security Compliance	Less than 5 unauthorized security breaches over 3 months	Dev Team
Retention	Enterprise User Retention	Under 5% decrease in enterprise account user retention 1 month after launch.	Account Team
User Feedback	User Satisfaction	20% increase in user satisfaction positive ratings of enterprise users over 2 months.	Product



WHAT WENT WELL

Stakeholders: After working with many clients over the course of my career I thought that this project did a great job of creating a tactile feel for all the stakeholders involved. I have experienced these people in real life and it is a delicate dance to keep everyone in the loop, but not in the trenches.

User Personas: I enjoyed identifying the users and creating personas to represent them. Giving the customer an identity and traits really helped provide empathy and an honest want to make their lives easier.

The Frameworks: I enjoyed learning all the excellent frameworks that are available to think through complex problems. They really do an excellent job of organizing thoughts for things like stakeholder buy in and prioritization, and make the thoughts easy to digest.



WHAT COULD IMPROVE

Survey Techniques: I would spend more time going over my research questions for user surveys. Some of the questions that I asked tried to push the user into a particular solution. Especially when it came to trying to figure out user solutions.

Metrics: I would do a deeper dive to make my metrics provide success criteria across more areas.

Team Collaboration: I enjoy working through problems with multiple team members to collaborate with. I wish I would have brought in more people as proxy team members.
