



The visual details of this project are confidential under NDA.

Reimagining Software Roles & Permissions

Enhancing role-based access management for
frictionless workplace collaboration models

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Project Overview

A global IT SaaS leader aimed to reimagine role-based access management throughout its complex software ecosystem to meet the shifting needs of workplace collaboration. The objective was to understand the current practices of role assignment and user management across multi-product platforms, with the goal of aligning software access control with organizational needs.

Approach

Exploratory and qualitative UXR to capture insights into how admins assign roles and manage permissions across in-app and platform levels.

- **Exploratory Interviews:** Conducted remote in-depth-interviews with 16 participants from 13 B2B customers to understand their experiences, challenges, and needs with role-based access management.
- **Stakeholder Mapping:** Identified key players, relationships, and activities involved in assigning software roles within organizations.
- **Segmentation of Roles:** Explored role types and permission levels required within in-app and cross-system contexts.
- **UX Walkthroughs:** Analyzed best-in-class role management experiences to benchmark ideal scenarios against current practices, identifying gaps and opportunities for improvement.

My Role

As Project Lead, I managed a cross-functional team through planning and execution of all milestones, leading to delivery of strategic insights.

- Developed a comprehensive research plan, encompassing stakeholder mapping, role segmentation, and qualitative analysis.
- Managed participant recruitment, scheduling, and logistics for in-depth interviews.
- Guided the creation of organizational archetypes and a multi-user journey map to illustrate the stakeholders, dynamics, and interfaces involved in software access distribution.
- Crafted a compelling presentation outlining key findings, strategic opportunities, and recommendations for enhancing role-based access management.

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Key Findings & Insights

We identified a need for improved consistency, security, and customization to address common challenges in role-based access management.

- **Complexity in Role Assignment:** Users struggled with navigating the hierarchical and fragmented role assignment processes across different platforms, leading to inefficiencies.
- **Lack of Granularity:** The system's inability to tailor roles to specific needs resulted in security concerns and operational inefficiencies.
- **Inconsistent User Experience:** Variations in terminology and workflows across different applications caused confusion and slowed down role management tasks.
- **Prioritization of Security:** Though cost and collaboration were key considerations, security emerged as the most critical factor influencing role assignment decisions, regardless of organizational size or complexity.

Recommended Solutions

The ideal software access experience will support tool allocation, work quality assurance, compliance regulation, and security management.

- **Unified Role Management Framework:** Establish a consistent taxonomy and streamlined workflows across all products to simplify role assignment.
- **Granular Role Customization:** Enable more precise control over permissions to better align with diverse organizational needs and user responsibilities.
- **Automated Compliance Monitoring:** Implement advanced tools for tracking and auditing role assignments to ensure adherence to organizational policies.
- **Simplified User Interfaces:** Design more intuitive interfaces that reduce complexity and improve efficiency of managing roles and permissions across platforms.

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Impact

- The research informed the development of a unified framework for role-based access management, which aimed to streamline the process across various products.
- The insights also guided cross-functional efforts to create new tools and features to simplify role assignment, reduce errors, and improve overall user experience.
- These findings continue to influence strategic decisions and product enhancements in the broader software ecosystem.

Reflection

Challenges: Balancing the need for security with the demand for a simplified and user-centric role management process was a complex task. Additionally, designing a unified solution that accommodates diverse organizational structures and needs required careful consideration and iteration.

Outcome: The project resulted in a strategic framework that not only improved the current role management experience but also set the stage for future innovations in user access management. The collaboration underscored the importance of a holistic approach to design research in driving impactful service design and product strategy.