



**Approval tool:  
Finding the problem  
in a solution-driven  
approach**



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**Working with customer service feedback**

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- ❑ While I was working on MOO's B2B product, a lot the feedback we were working with in the product team came from the Sales department. This feedback was constant and gave us some great customer insights without having to use additional resources for customer testing recruitment, surveys etc.
- ❑ However - a lot of the feedback was very solution driven. New functionality was requested without an explanation of what problem we're actually solving.
- ❑ One of these things was an 'Approval tool'. The idea was simple - someone in the business needs to be able to approve a purchase.



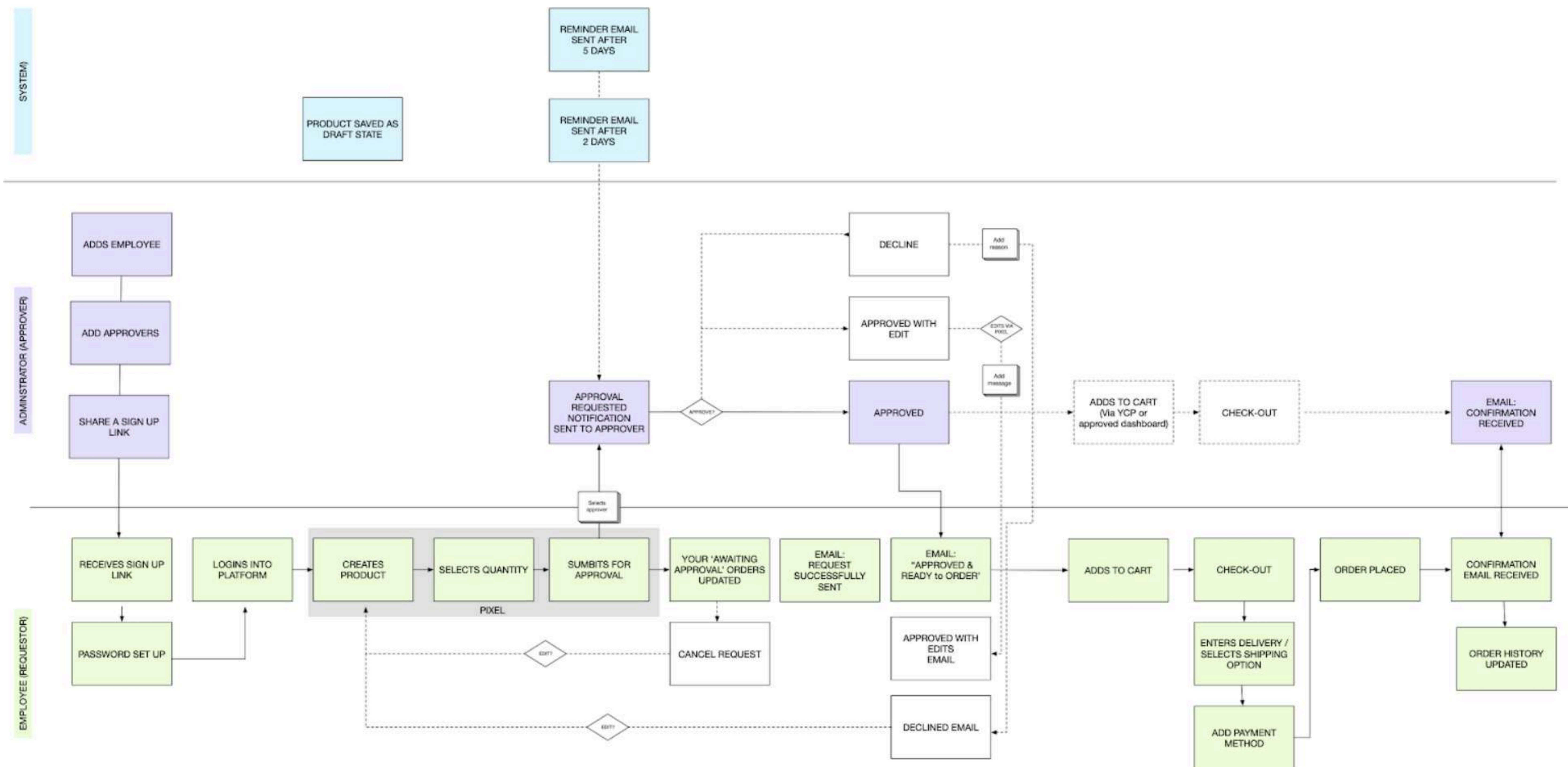
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Journey mapping

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**There were a lot of open questions, so I set up a journey mapping session with different parts of the Sales team. Together, we came up with an ideal solution that would be a great improvement for customers that have requested a feature like this.**







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**Working with legacy systems**

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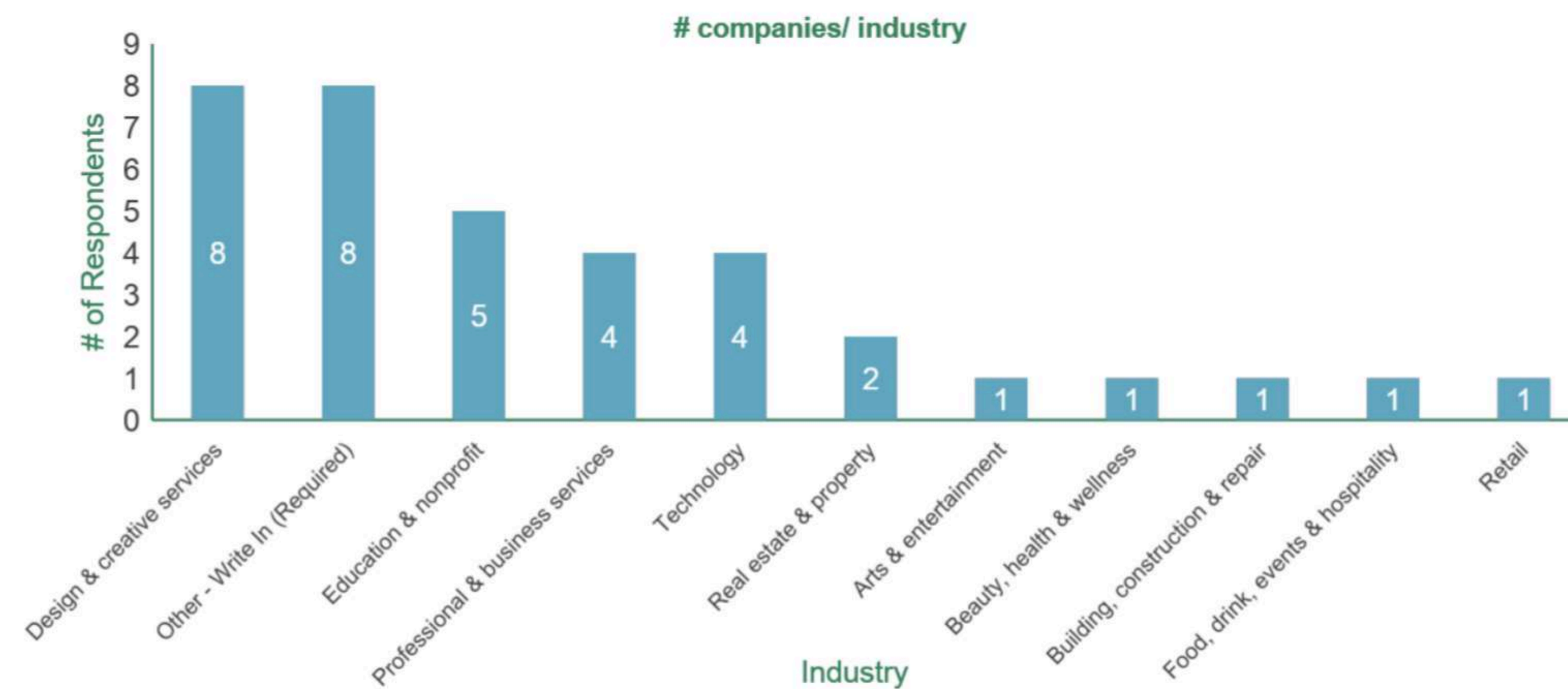
Together with the rest of the product team, including our engineers, we quickly saw that this would not be an easy task. Most of the platform was built on legacy systems including our payment and shipping systems which hadn't been touched in years. The 'ideal' solution would have required a complete restructure of our account and permission systems, as well as a refactor of payment and shipping to just make part of the solution possible. We were talking about months, if not years of development effort.



To validate which type of customer would actually be using (and paying for) this feature, we ran a survey with existing customers. This gave us a much clearer profile of which type of customer would use the tool. We've established that especially large companies with multiple offices across the world would be interested.

### Participant Characteristics

- 36 respondents in total
- 12 resellers (30%) offering business card design and/ or printing services
- 30 (83%) have employees / agents working outside of office



Other: Finance & Mortgage, Marketplace, Manufacturing (2), Education & Healthcare, Professional Association, Transportation/ Trucking, Food Logistics



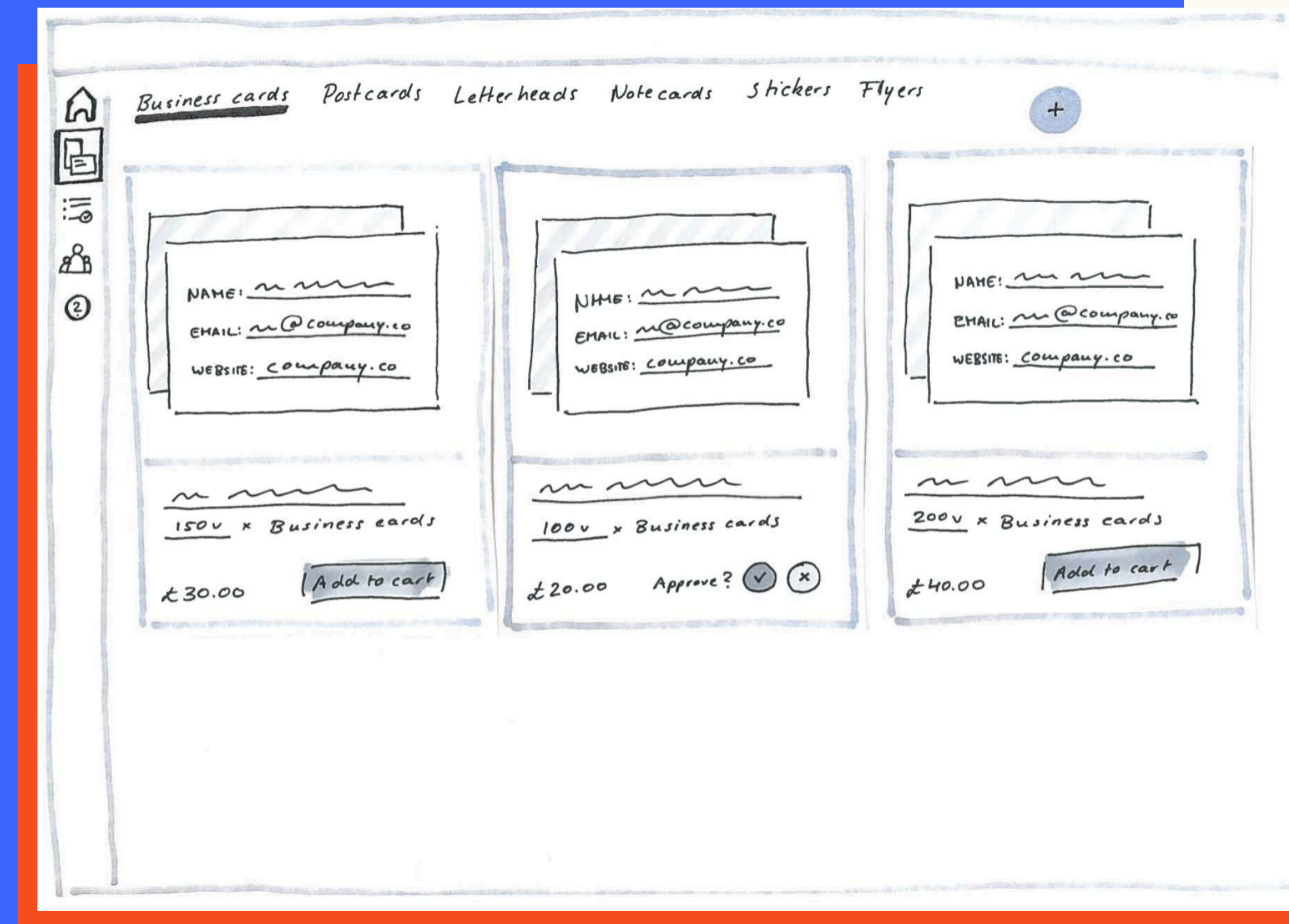


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Paper prototype

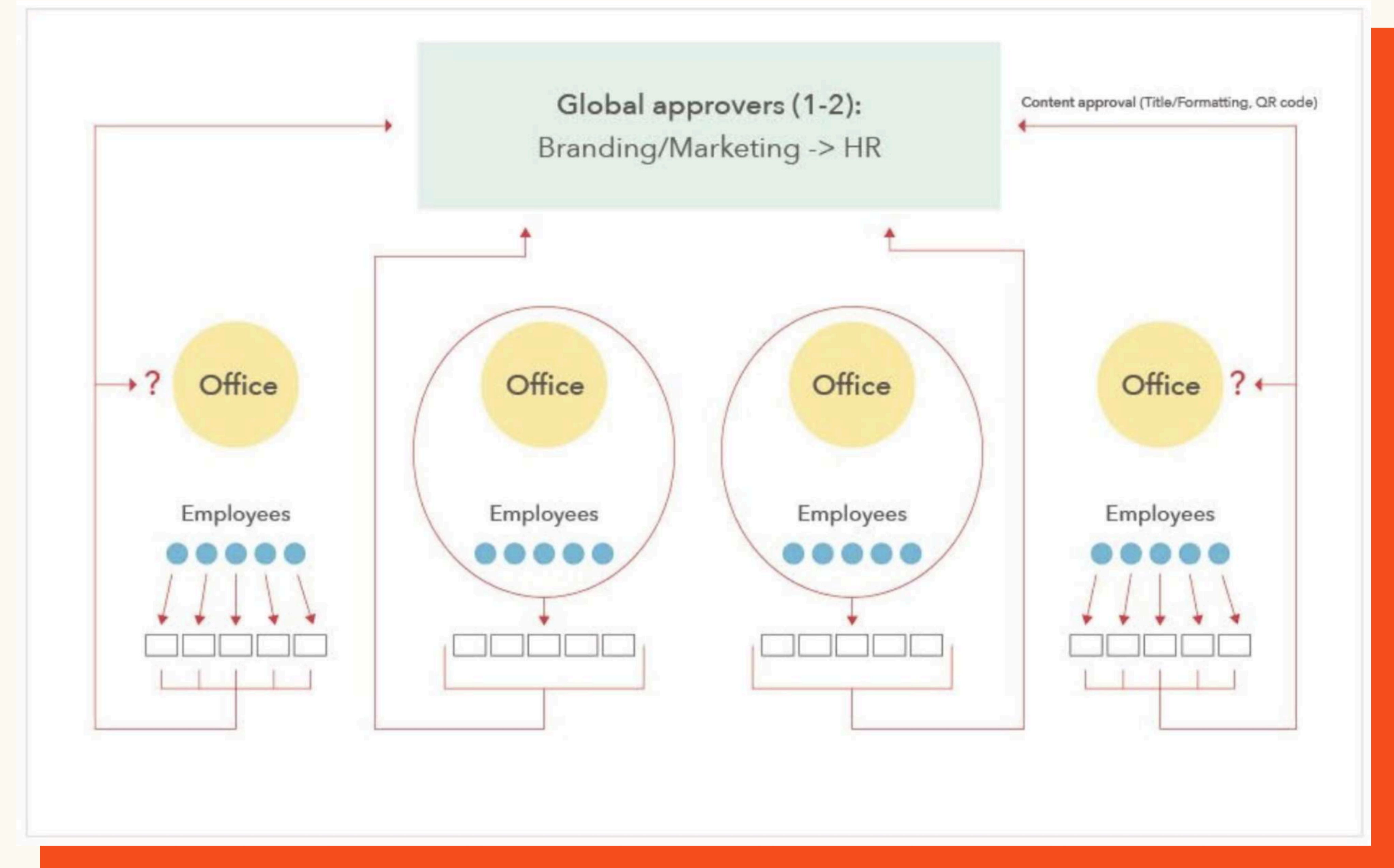
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We recruited a dozen existing customers that fit our profile for interviews and feedback on a first paper prototype we have created.





The results were interesting. After speaking to our customers, we realised that every company is structured differently. In some companies, a group of people would be approving purchases, some companies had an individual responsible, some companies had different people to approve different aspects of the purchase, some companies had a nested approval across several layers in the business.







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**The why of an approval tool**

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- ❑ The issue was obvious. Our current systems weren't laid out for that much customisation. Building a workaround feature would only work for a very small subset of customers and wouldn't be worth the effort.
- ❑ But, we also learnt a lot about the need of an approval system. "Approvers" are worried about employees ordering the wrong product, not necessarily about how much money is being spent. They are worried that they may order something they are not allowed to. The product can be customised by the employee, so they were also worried about brand identity and their employees customising the product in a way they are not allowed to.



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**A cost effective solution**

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- ❑ Based on our research findings and what was technically feasible, we decided that the only possible solution wasn't to let companies approve the full purchase but the product itself. If approval has been enabled on an account, an employee can create a product that they want to order, but they are not able to order it until an admin has approved the product. Once it has been approved, it can only be ordered in its exact status.
- ❑ This solution allowed us to fully avoid touching account, permission and ordering and payment systems. Out of our customer base, we still got the highest possible number of potential consumers for this product with the least possible effort.

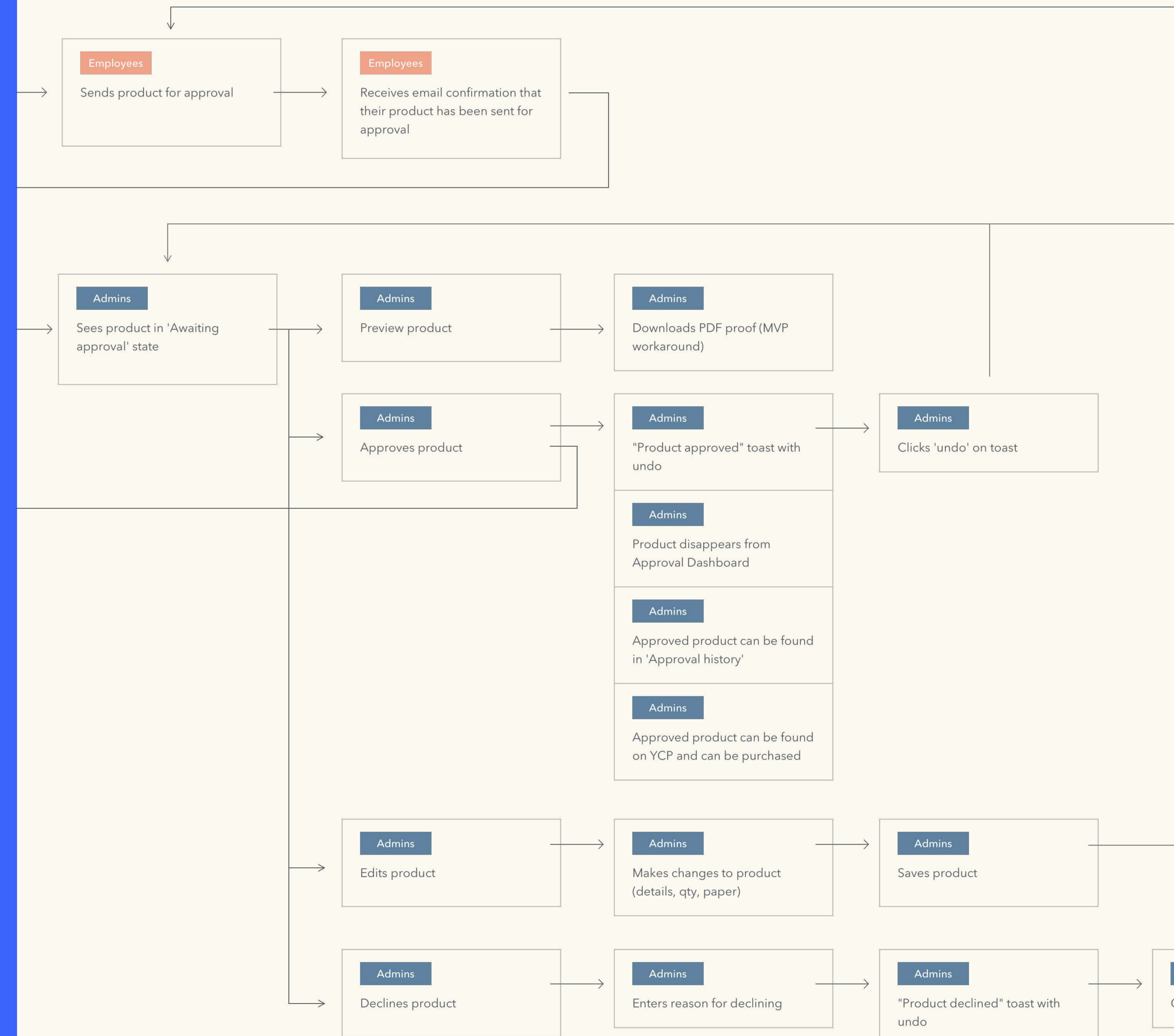


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User journeys

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Based on our plan, I started drawing out user journeys that we used later on to write user stories





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User interface

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The desktop interface features a top navigation bar with the MOO logo, currency (GBP), cart status, and user profile. A sidebar on the left contains navigation icons for home, folders, a pending requests list (with a '5' notification), and help. The main content area is titled 'Awaiting approval' and includes a search bar, '250 results', and 'Filter / Sort by' and 'Select all' buttons. Three request cards are visible:

- Request 1:** [Project title], Requested by: [Employee Name] on [DD MON YYYY], Product: [Size] [Product category], Paper: [Paper] paper with a [finish] finish and [corners] corners. Includes a preview of a business card for Paola Cracknell and 'Decline'/'Approve' buttons.
- Request 2:** Joe Bloggs, CEO, Requested by: Joe Bloggs on 01 Jan 1979, Product: Square Business Cards, Paper: Original paper with a high gloss finish and square corners. Includes a preview of six business cards and 'Decline'/'Approve' buttons.
- Request 3:** Jane Doe, Director of Fun, Requested by: Jane Doe on 01 Jan 1979, Product: Medium Postcards, Paper: Super paper with a soft touch finish and square corners. Includes a preview of postcards and 'Decline'/'Approve' buttons.

The mobile interface is a simplified version of the desktop view. It features a top bar with the MOO logo and a hamburger menu. Below the navigation is a 'Awaiting approval' header with an information icon and a 'History' link. A search bar is present, followed by a list of request cards:

- Request 1:** [Project title], Requested by: [Employee Name] on [DD MON YYYY], Product: [Size] [Product category], Paper: [Paper] paper with a [finish] finish and [corners] corners. Includes a preview of a business card for Paola Cracknell and 'Decline'/'Approve' buttons.
- Request 2:** [Project title], Requested by: [Employee Name] on [DD MON YYYY], Product: [Size] [Product category], Paper: [Paper] paper with a [finish] finish and [corners] corners. Includes 'Decline'/'Approve' buttons.
- Request 3:** [Project title], Requested by: [Employee Name] on [DD MON YYYY], Product: [Size] [Product category], Paper: [Paper] paper with a [finish] finish and [corners] corners. Includes a preview of a business card for Paola Cracknell and 'Decline'/'Approve' buttons.



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User interface

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The desktop interface shows a navigation sidebar on the left with icons for home, search, notifications, and user profile. The main content area is titled "Awaiting approval" and displays a product card for "Made UpCo." with a generic employee contact. A modal dialog is open in the center, asking for confirmation to decline the product. The dialog includes a preview of the product card, a text input field for a message, and "Cancel" and "Decline" buttons. In the background, a search results page is visible with "250 results" and a "Filter / Sort by" button.

The mobile interface shows a similar product approval dialog. The top navigation bar includes the MOO logo and a menu icon. The dialog is titled "Awaiting approval" and "History". It features a product card preview, a confirmation question, a text input field for a message, and "Decline" and "Cancel" buttons. The background shows a blurred view of the product card and a user profile card for "Paola Cracknell".



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User interface

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The screenshot displays the MOO website's business card design interface. At the top, the MOO logo is on the left, and the currency (GBP), cart status (0), and user profile (Lucy) are on the right. A navigation bar includes categories like Business Cards, Postcards, Letterheads, Notecards, Stickers, and Flyers. A search bar and filters (250 results, Filter / Sort by, Select all) are present. The main area shows a grid of business card designs for Paola Cracknell, Partnerships & Implementation Manager. Each design includes contact information and the company name. The designs are categorized by status: 'Awaiting approval', 'Declined', 'Draft', and 'Approved'. Below each design, there is a description of the paper type (10000 x Super Soft Touch paper with rounded corners), the price (\$49.00), and an 'Add to cart' button. A modal window is open over one of the designs, showing an 'Edit' button and a confirmation message: 'What's this? Your product has been reviewed by an admin and is ready to order! Please note that any changes you make to the design will result in a new request for approval.'