Problem Statement

How will you design an expense management app for an enterprise (eg: Microsoft) on the Microsoft Teams app platform?

Business Goals

1. Increase the adoption of expense management app on teams
2. Reducing context switching of the expense management app on teams
3. Allow collaboration of the expense management app on teams

Assumptions

Let me start with a few assumptions that will act as a bounded context for the problem statement:

1. There is an existing Expense Management App called ‘Expensimate’ and I am trying to extend its capabilities to work on Microsoft Teams
2. I am the PM of Expensimate’s Microsoft Teams charter and will be only looking for the capabilities which will be extended to Microsoft Teams
3. ‘Expensimate’ only solves expense problems for enterprise and not other use cases like Payroll, Travel Booking, etc
4. Registration, Setup, Org & Approval Matrix and Access Control capabilities are part of Expensimate’s core platform and will not be extended to Microsoft Team, or in other words if the user want to create a new account, manage approval matrix, (s)he has to do it on Expensimate platform
5. I am only designing the product for desktop application and not for other clients

User Personas

Cristina

Cristina is a Manager of the Azure team. She is highly focused and result oriented.

Behaviors

1. Helps the team whenever they face any problem
2. Tries to increase the productivity of her team
3. Juggles with multiple tasks and meeting (is very busy)

Needs and Goals

1. Easy way to get notified and take action on her expense requests
2. Manage expenses related to her activities and her teams expense requests
3. Check older expenses and reports

Bianca

Bianca is a young energetic Microsoft EAS Consultant. She frequently travels to client offices all over the world.

Behaviors

1. Travels all around the world
2. Uses phone to communicate and have meetings
3. Arranges lunch meetings for her clients

Needs and Goals

1. Easy way to log her expenses – offline transactions, online transactions or third party software collaborations
2. Get her expense approvals done quickly
3. Get reimbursements and loan quickly

Alex

Alex is the finance head of the Azure team. He always tries to save and optimize the budget.

Behaviors

1. Cuts cost any way possible
2. Cross validates all the expenses
3. Tries to reduce fraudulency

Needs and Goals

1. Easy way to get all the expense approval
2. Reconciliation of records
3. Reduce cost
4. Negate fraudulent or duplicate records

Use Cases

Considering all the problems and needs of the user personas, let me list down the use cases

Christina (Manager Role)

1. As a user I want to get notification of all the expenses logged by my team member so that I can act upon them asap
2. As a user I want to log different categories of expenses like travel, reimbursement, team activities, procurement, etc so that my manager can act upon them
3. As a user I want to log my types of expenses like offline bills, digital expenses or transactions on third party application (online booking, digital purchases, procurement, etc)
4. As a user I want to delegate few categories of expenses to the admin/HR so they can act upon on my behalf
5. As a user I want to view expense reports so that I can check them
6. As a user I want be able to access some petty cash
7. As a user I want be able to track all my logged expenses so that I can know their statuses
8. As a user I want to get notifications of all my logged expense status/state change so that I am UpToDate

Bianca (Teammate Role)

1. As a user I want to log different categories of expenses like travel, reimbursement, team activities, procurement, etc so that my manager can act upon them
2. As a user I want to log my types of expenses like offline bills, digital expenses or transactions on third party application (online booking, digital purchases, procurement, etc)
3. As a user I should be able to track all my logged expenses so that I can know their statuses
4. As a user I want to get notifications of all my logged expense status/state change so that I am UpToDate
5. As a user I want be able to access some petty cash and loan

Alex (Finance Manager Role)

1. As a user I want to check all the logged expenses so that I can reconcile them
2. As a user I want to accept or reject a logged expense based on my reconciliation
3. As a user I want to get expense reports so that I can maintain my bookkeeping
4. As a user I want to reduce duplicity of bills so that I can save company’s money
5. As a user I want to track all the fraud bills and expenses so that I can save company’s money
6. As a user I want to add or remove different payment options like debit and credit cards
7. As a user I want to transfer/reimburse back the expenses of the employees
8. As a user I want to get intelligent insights about different expenses in the organization/teams so that I can save money
9. As a user I want to automate my reconciliation activities so that I can save time

Prioritization

For phase 1 (MVP) I want to prioritize Christina’s and Bianca’s use cases and for Alex, I want to only focus on approval/rejection and reporting use cases.

Product Overview

Let me list down the product capabilities (Phase 1/MVP):

1. The capability to log different expense attributes based on the expense type like Loans, Petty Cash, Offline Bills (Upload, Photo and OCR) or third part APIs
2. The capability to log different categories of expenses like reimbursement, travel tickets purchase, third party vendor payout, other purchases, team activities, etc
3. The capability to perform different actions – Add, Edit, Assign, Remind, Delete, Approve, Reject, Escalate and Hold
4. The capability to get notification for each action – Add, Assignment, Approval/Rejection From Manager, Approval/Rejection From Finance
5. The capability to delegate expenses of different expense categories to different users/roles (On Behalf Of Flows)
6. The capability to get reports based of different date parameters like daily, weekly, monthly, yearly or custom dates

User Scenarios and Features

#	User Scenarios	Features and Capabilities
1	**Open conversations and browse through the chat to find connector cards** Christina opens up the Teams Application and goes to her team channel. She finds out three Expensimate cards (connector) on the chat thread (conversation) pending for her attention. She sees its all from Bianca's last travel expenses. She validates the expenses and approves them all.	Assigned To Me, Connector cards, Teams, Conversations and Approve Action
2	**Use Expensimate Bot to log expense** Christina remembers she has to arrange a team launch as the team has done so well to hit the revenue targets. She uses the Expensimate Bot to get approval of the expense category team activity and expense type petty cash.	Bot, Expense Category, Expense Type, Expense Attributes and Add Action
3	**Check, edit and add expenses using the expense tab** Bianca is just back from her client meeting trip and this time the trip was a long and expensive, she wants to get reimbursed as soon as possible. She uses the Expensimate Tab to log her expenses using the expense form. She carefully logs all the entries and uploads the bills. Bianca after adding her expenses sees she has made an error while entering the amount, she edits the expense line item from the edit option.	Expense Tab and Expense Form, Add and Edit Actions
4	**Get desktop notification for every card assigned and perform action** Alex gets a desktop notification that there are Expensimate cards assigned to him. He checks them out and finds two of the team member has uploaded the same bills. He immediately rejects both of them and comments as 'Duplicate Bills'	Desktop Notification, Assigned To Me, Connector Cards, Reject Action and Comment
5	**Delegate categories of expenses to other users** Christina is often getting expense approvals for mobile bill reimbursement, and as the amount is very small Christina doesn't need to scrutinize them. She plans to delegate this category of expense - Mobile Bill Reimbursements (Rule - Less Than Rs 2000) to her admin Peter so that he can easy take action on the same.	Expense Tab, Delegate Action, Expense Category, Expense Type and Rule
6	**Generate expense reports for different dates** Alex was creating the tax filling for the Azure Team and he wanted to go through the consolidated expense report. He goes to the Expense Tab clicks on Generate Report for the financial year 2018-2019.	Expense Tab, Generate Report and Select Dates

User Journey Maps

Christina

View Assigned Expenses	View Expenses	Add Expenses	Delegate Expenses	Generate Reports	Notifications
• View Assigned Cards • Take Actions : Approve, Reject, Escalate	• Remind Expense • Edit Expense • Delete Expense	• Select Expense Type • Select Expense Category • Define Expense Attributes • Assign Expense	• Select Expense Type • Select Expense Category • Select From and To Dates • Create Rules • Select Delegate To	• Select Dates	• Based on Assignment and status (state) change

Bianca

View Expenses

- Remind Expense
- Edit Expense
- Delete Expense

Add Expenses

- Select Expense Type
- Select Expense Category
- Define Expense Attributes
- Assign Expense

Notifications

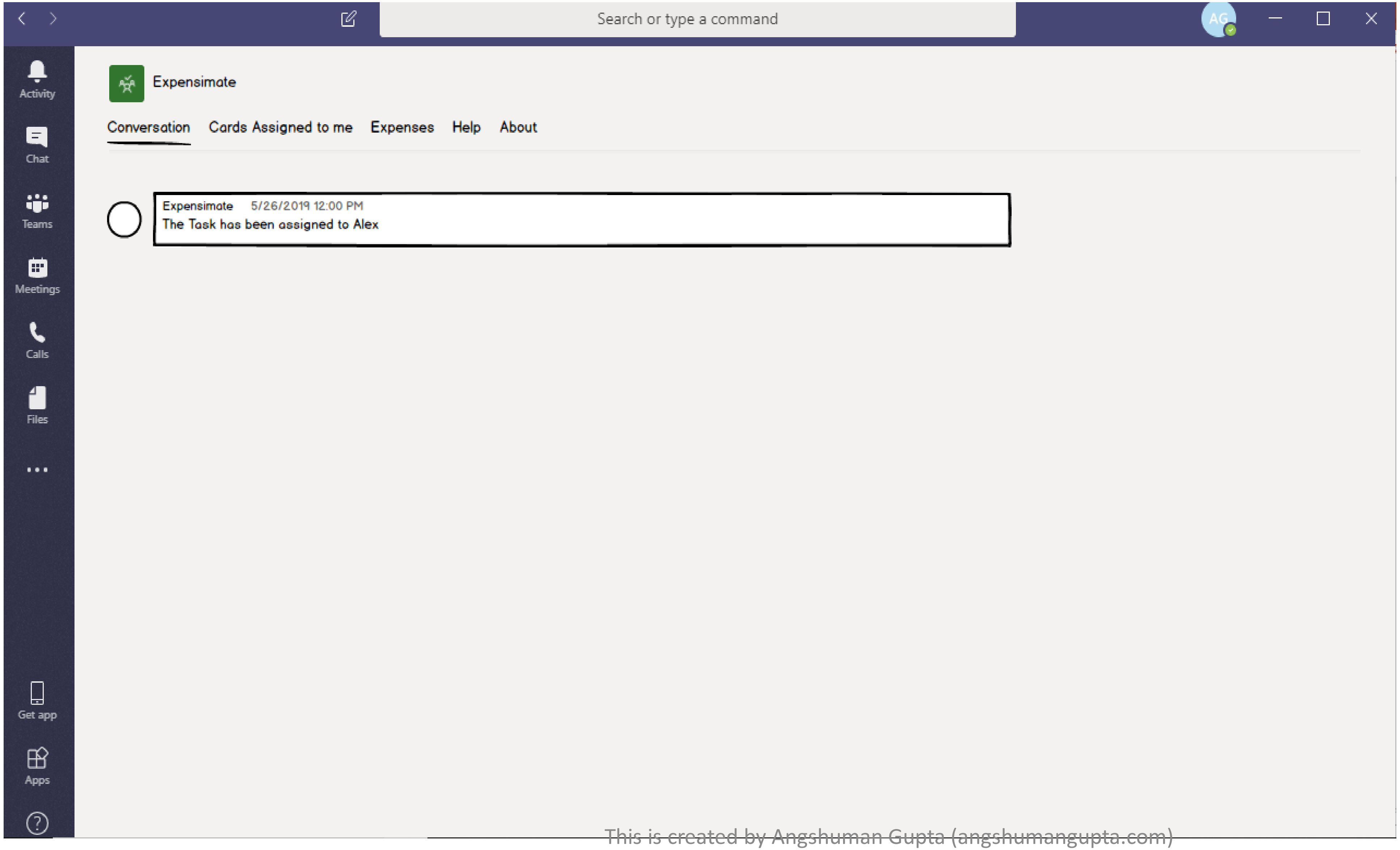
- Based on Status (State) Change

Alex

View Assigned Expenses	View Expenses	Add Expenses	Delegate Expenses	Generate Reports	Notifications
• View Assigned Cards • Take Actions : Approve, Reject, Hold	• Remind Expense • Edit Expense • Delete Expense	• Select Expense Type • Select Expense Category • Define Expense Attributes • Assign Expense	• Select Expense Type • Select Expense Category • Select From and To Dates • Create Rules • Select Delegate To	• Select Dates	• Based on Assignment and status (state) change

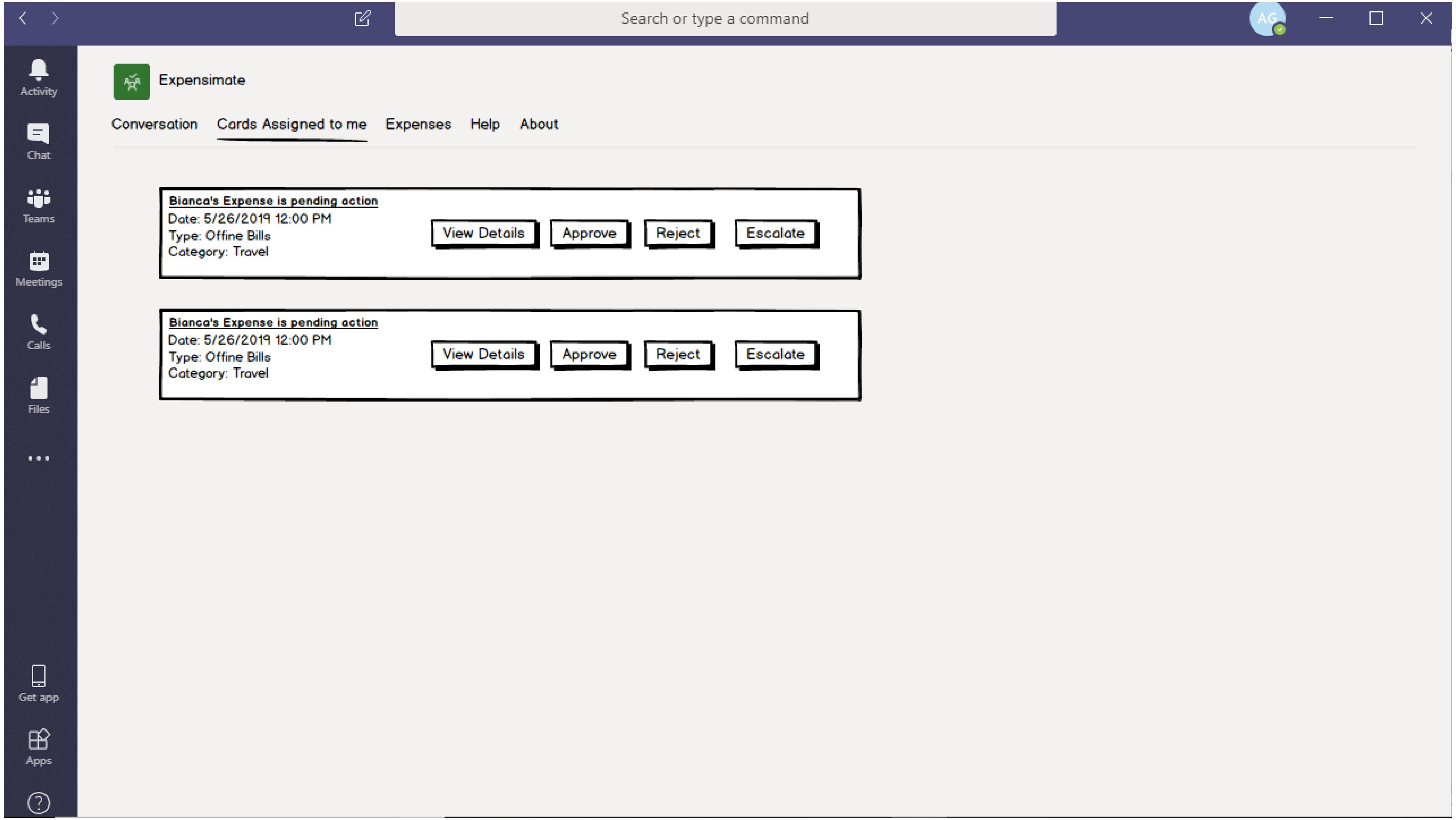
Designs (Mockups)

Conversations



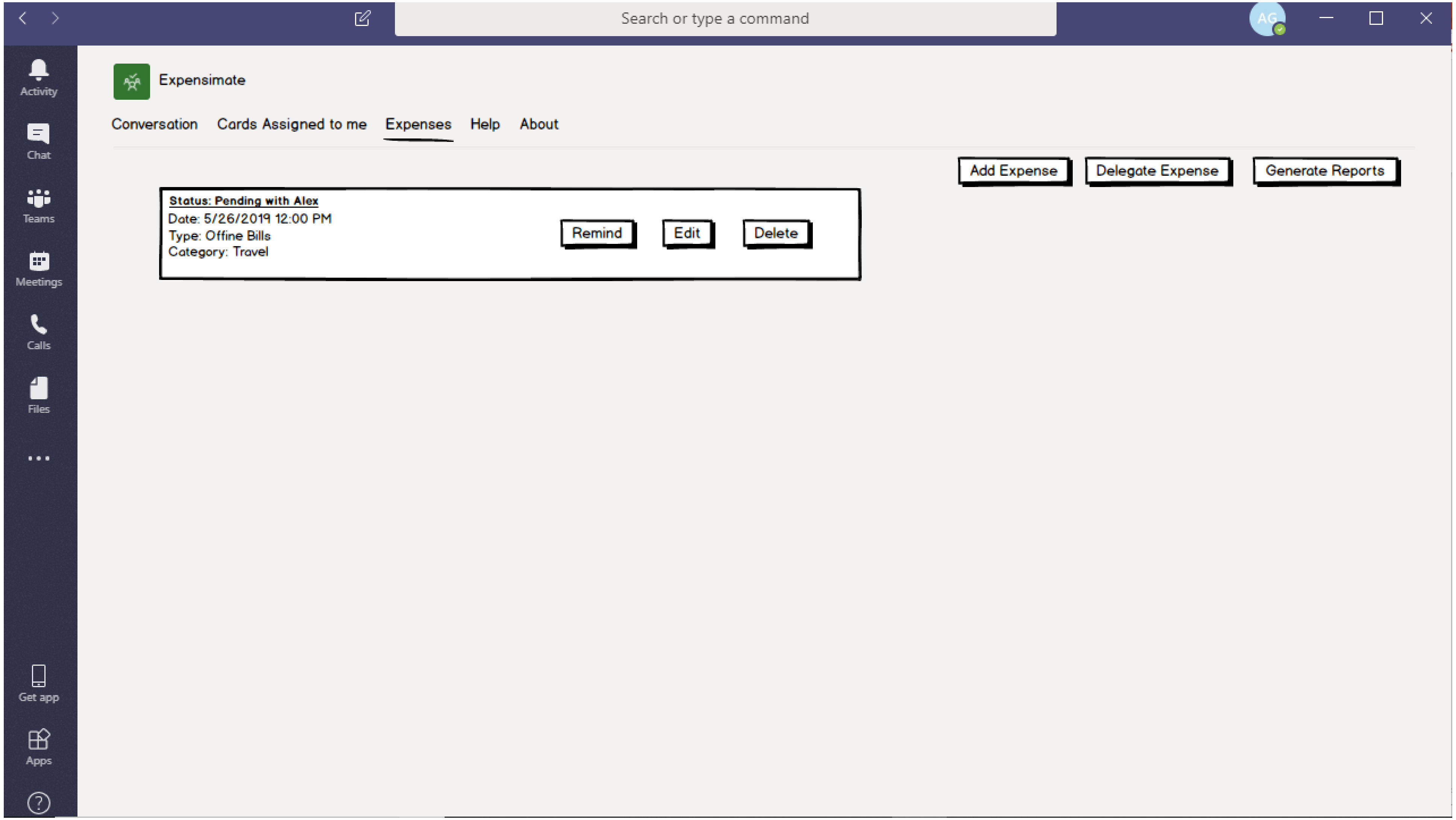
1. User can ask the bot to perform different actions
2. The bot will respond depending on the result of the action
3. In this example, Christina has assigned a new expense to Alex and the bot has responded back with the message

Cards Assigned to me



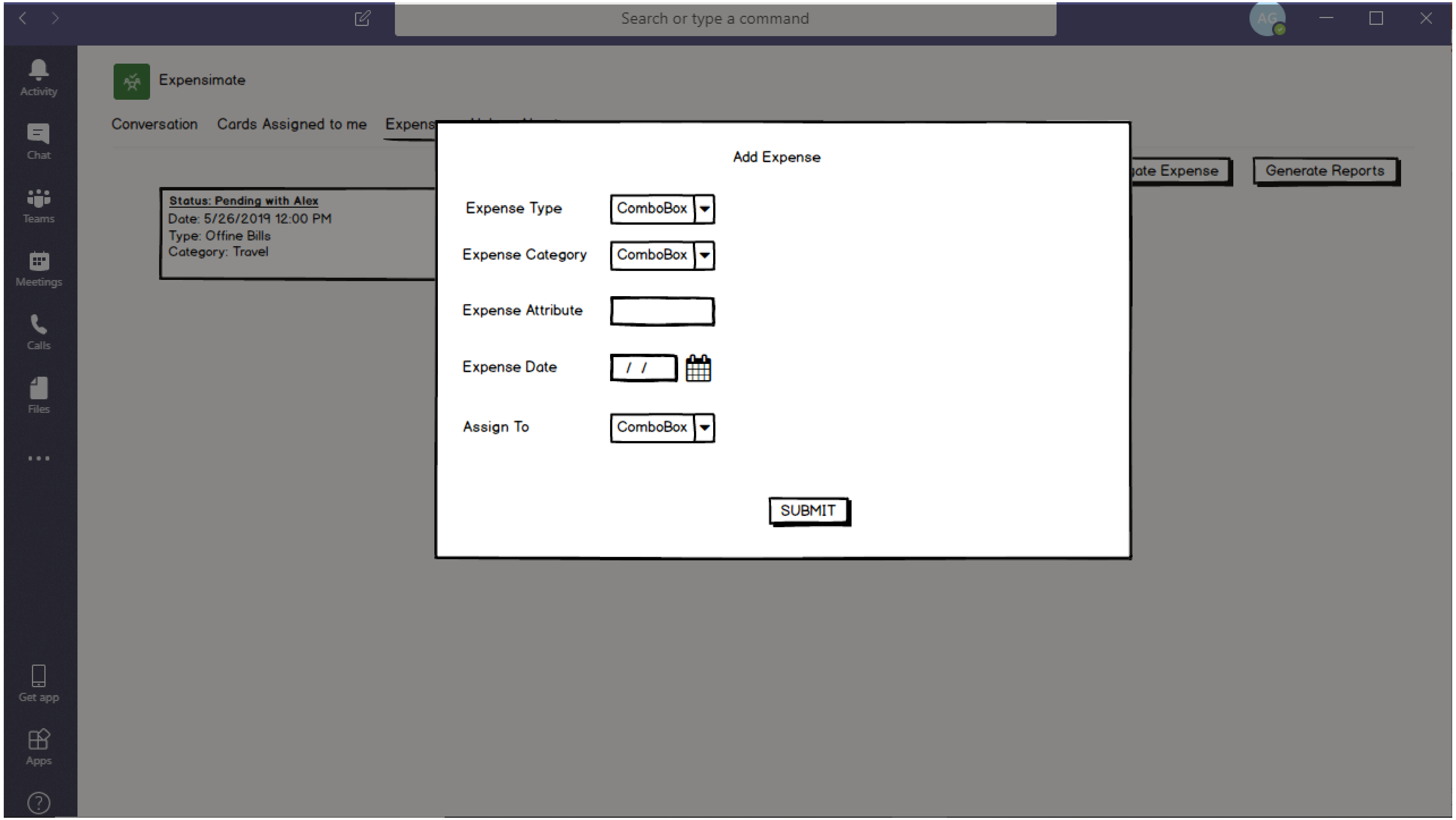
1. User can check the connector cards assigned to them
2. User can perform the different actions – View Details (It will open the form – check add expense form), Approve, Reject (user has to comment after the rejection), Escalate (to the person in the approval matrix set)

Expense



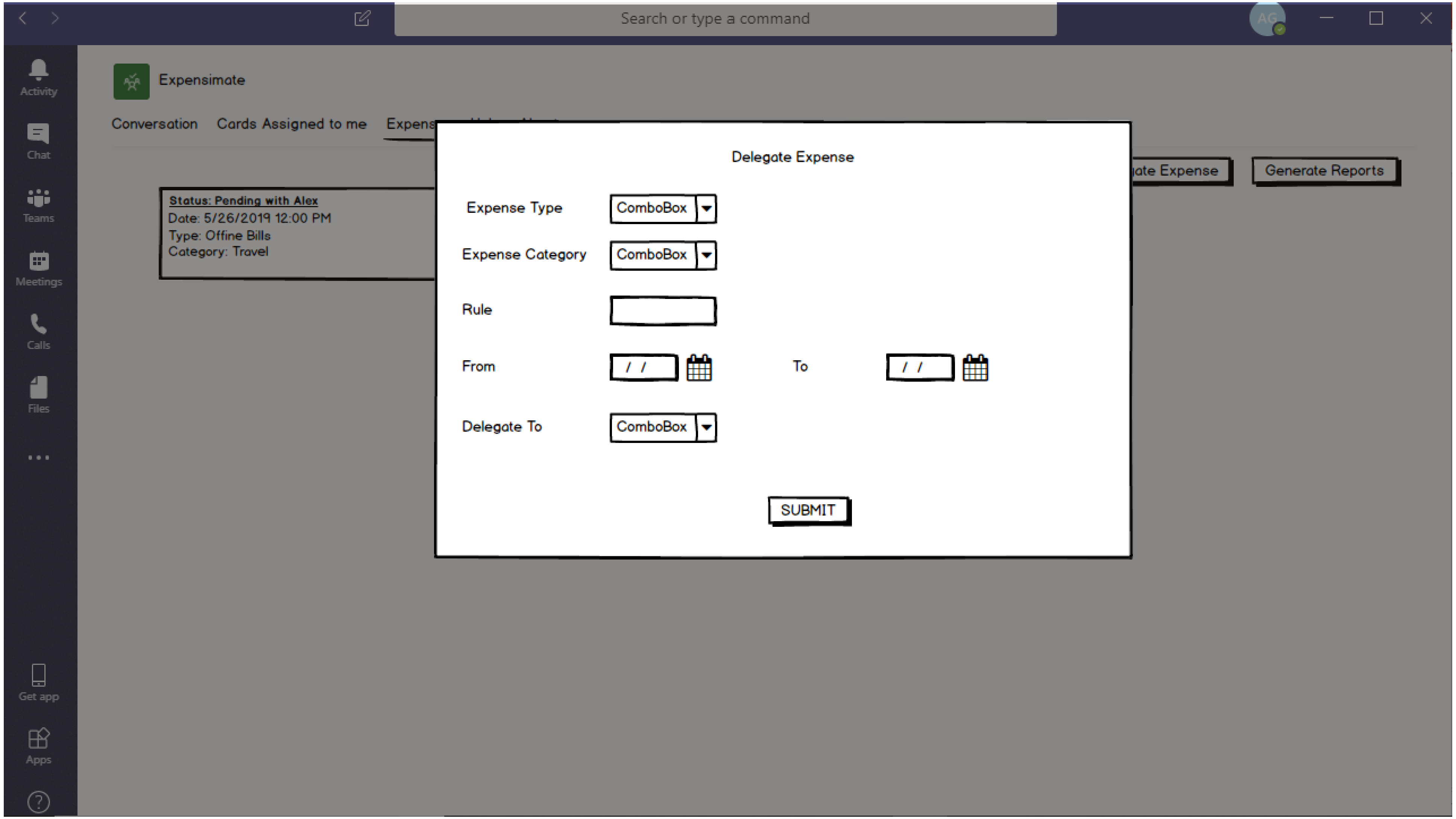
1. User can add a new expense, delegate a expense rule, generate reports or view all the existing expenses created
2. The existing expenses will comprise of Status, Date, Type, Category and Actions – Remind (This will give a remainder notification to the assigned user), Edit (as long it is pending for approval and will open expense form) and Delete (as long it is pending for approval)

Add Expense



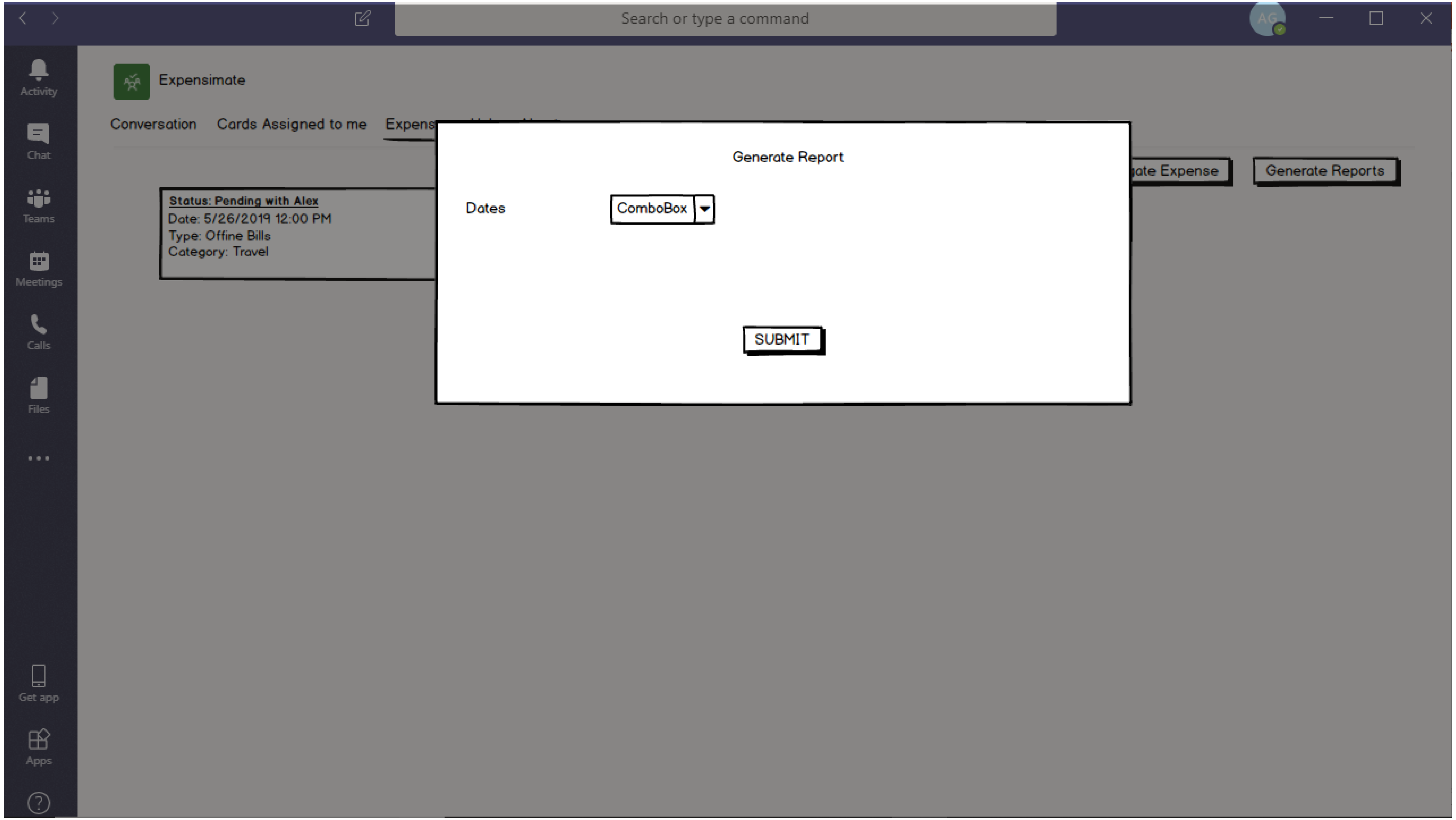
1. User can create a new expense record on clicking 'Add Expense'
2. The 'Add Expense' will open up a form comprising of Expense Type, Expense Category Dropdowns, Expense Attributes (This has a dependency on Expense Type, for example for offline bills a upload option and bill amount field will be the attributes, similarly for third party a option to connect with separate account to fetch the data will be the attribute), Expense Date and Assign To dropdown to select the user as set in the approval matrix

Delegate Expense



1. User can delegate a type of expense on clicking 'Delegate Expense'
2. Delegate Expense will open up the form where the user has to select the Expense Type, Expense Category, Rule (This has a dependency on the Expense Type and its attribute, for example if there is amount attribute user can set a rule 'Greater than X Amount'), From and To Dates, Delegate To Person (Select the user depending on the org matrix created)

Generate Reports



1. User can generate report on clicking onto ‘Generate Reports’
2. Generate Report pop-up will have and option to select the dates – Daily (Today’s Report), Weekly (Current Weeks Report), Monthly (Current Month’s Report), Yearly or Custom (From and To Dates)

Success Criteria

Following will be metrics we need to track:

1. # of Users Opening the Team Expensimate App/Total # of Expensimate Users (all platforms)

2. # of times users opening the Team Expensimate App/Total # of times user opening the Expensimate App (all platforms) for the segment of users using the Team Expensimate App

3. Session Length on Team Expensimate App/Total Session Length (all platforms) for the segment of users using the Team Expensimate App

4. # of Users using Team Expensimate App/ Total # of Users in the team app for that team/organization

5. # of users reported a Team Expensimate bug/# of users using Team Expensimate App

Thank You

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