

Copy + Process Fixes for Groupon's Merchant Advisor

UX Content + Spreadsheet
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What is Merchant Advisor?

Groupon's Merchant Advisor tool gives targeted recommendations to business owners ("merchants") who use the platform.

An example of a recommendation and its accompanying info is shown to the right.

The heading shows the main issue at hand, while the second row identifies the campaign that has that issue. The "why" section tells the merchant how to fix the problem.

Customers claim your services don't match your campaign. ...

For: Facial Treatments at Sorelle (Up to 53% Off).

Why: Please make sure your campaign accurately describes what customers will receive.

CTA

Problem: Chronic Disorganization of Copy

When I was given a new set of merchant feedback codes to write recommendations for, I realized that the way this project had been organized was not optimal for copy. Screenshots from the Figma show a bird's eye view of what I was working with, haha!

Account-level Recommendations

Customers can't redeem on your website.

Why: Please make sure your site is set up for redemption, and check the redemption instructions in your campaign.

Critical Impact

CTA

Recommendation: Customers can't redeem vouchers on your website. Please check your redemption instructions. [Edit info](#)

Customers claim your business is not what they expected.

Why: Please ensure your business's information is accurate.

Critical Impact

CTA

Recommendation: Customers say your business is not what they expected. Please ensure your information is accurate. [Edit](#)

Campaign-level Recommendations



Account-level Recommendations



Solution: Spreadsheets Help Organize Copy

Groupon had been short-staffed in the copy department before I came on, so many design processes had been developed by designers without input from copy.

In my previous roles, I had used spreadsheets to slice and dice my copy (and its metadata) in useful ways.

While there's the slight problem of keeping the Figma doc synced with the spreadsheet, product managers found it easier to review many recommendations at once when the copy was in this form.

Drafting and editing is easier too with this method, since a piece of copy can be updated in a single spreadsheet cell rather than over many screen variations in the Figma.

Bird's Eye View of Finished Spreadsheet

	A	B	C	D	E	F	G	H	I	J	K	L
1	Feedback From Customers	Category: Campaign, Account, or Opportunity	Campaign or Option specific	Impact	Dismissable?	Copy	CTA Copy	Banner Copy	MA Rec Format	Modal Trigger	CTA Links to:	Support Link
2	2F7 - Business is different than customers expected	Account	N/A	High	Yes	Customers claim your business is not what they expected. Please ensure your business's information is accurate.	Edit	Customers say your business is not what they expected. Please ensure your information is accurate.	Rec card	Critical # of feedback items with this reason code	"Description" step of CE	https://www.groupon.com/merchant/center/support/topics/prepare-your-business/articles/customer-loyalty-and-brand-awareness
3	2E3 - Customers aren't receiving appointment confirmations	Campaign	Campaign	High	Yes	Customers aren't receiving appointment confirmations. Please make sure you're responding to customers when they book an appointment. If your system sends auto-confirmations, please check it is working properly.	If no booking tools: Make Campaign Bookable With pre-existing booking tools: Manage Booking	Customers aren't receiving ap	Rec card	Critical # of feedback items with this reason code	Links to support page ->	https://www.groupon.com/merchant/center/support/topics/merchant-tools/articles/booking-tool-overview
4	2E8 - Business is closed (645) 2E11 - Acts of god prevent merchant from being able to accept Groupon (331) 2E9 - Merchant location closed/moved (not bankrupt) (19)	Account	N/A	Critical	No	Customers claim that your business is closed. Please make sure your hours and location info is up to date. If your business is closed, please pause your campaign.	Edit	Customers claim that your business is closed. Please pause your campaign, or update location and hours.	Rec card	Critical # of feedback items with this reason code	"Locations" step of CE	https://www.groupon.com/merchant/center/support/topics/prepare-your-business/articles/adding-or-updating-business-hours

Up Close:

On the left, the feedback code triggering a rec is the main index for each of copy. It is then tagged according to variables like severity level, and whether the merchant can dismiss it. Then comes copy for the rec in modal and banner form.

	A	B	C	D	E	F	G	H
1	Feedback From Customers	Category: Campaign, Account, or Opportunity	Campaign or Option specific	Impact	Dismissable?	Copy	CTA Copy	Banner Copy
2	2F7 - Business is different than customers expected	Account	N/A	High	Yes	Customers claim your business is not what they expected. Please ensure your business's information is accurate.	Edit If no booking	Customers say you is not what they ex Please ensure you information is accu

Positive Outcomes:

- Copy can be edited more easily, without early drafts being duplicated in Figma and therefore needing to be changed in many different places with each update.
- Copy can be reviewed and commented on more easily, especially for projects with many pieces of copy in the same basic format.
- Copy can be searched and sorted like a spreadsheet, which isn't possible in Figma.

Thanks for reading!

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