

# Case Study

# Credit Card Refunds Automation

**Industry:** Food Services



## Project Background:

One of America's most beloved restaurants needed to automate its credit card adjustment processes. Processes were time consuming and problematic due to information inconsistencies.



## Challenges:

Data-assembly man hours was limiting the analysts' ability to act on the information in a timely manner creating significant backlog.

The high volume and complexity drove up the forecast for additional FTEs needed to maintain this process.



## Solutions:

- JOLT helped optimize the manual workflow to be suitable for automation and developed the robot to cross check the request data with the company's data warehouse to verify the data accuracy and gather additional data points to process the adjustments automatically.
- A request that did not return complete details was sent to a human for analysis. The robot also updated the accounting system for journaling automatically.
- When the defined criteria was met, the robot would process the refund at the appropriate card site.

## Results:



### 1 Hour

Improved efficiency of the manual process from 1 day of manual work to 1 hour of bot work instead.



### Improved Efficiency

Staff is freed from tedious manual work and can now spend their time on higher value tasks.



### 40 Hours

Eliminated 8 hours of manual work daily. Saving 40-man hours in average weekly.

