

ABOUT THE CLIENT

Shift4 is a leader in secure payment processing solutions, powering billions of transactions across all industries. Shift4 integrates with a wide variety of POS (point of sale) tools and offers advanced security features, striving to simplify and streamline the complexities of commerce.

SHIFT4 LIGHTENS THE LOAD BY AUTOMATING MERCHANT BANK ACCOUNT CHANGES

BUSINESS CHALLENGE

Shift4 stands at the forefront of e-commerce, transforming how organizations collect and manage payment processing. While receiving thousands of transactions a day, Shift4 exclusively relied on custom-built Windows applications to process payments. The rigid applications were codified with backend restrictions and required hours of manual effort to adjust.

Brendan Lauber, Shift4's CTO, recognized Shift4's aspirations for global expansion couldn't be achieved unless they refocused their time and energy on repairing the backend applications to eliminate large manual lifts.

APPROACH & DISCOVERY

Lauber aimed to dissolve the barriers that kept Shift4 from progress: "We realized we were pushing paper, both digitally and physically, on processes that just didn't make sense." A business automation tool would provide a perfect solution to refine Shift4's processes and eliminate the manual effort consuming their resources.

Shift4 chose one internal pain-point to serve as their initiative's heartbeat, and began building a proof-of-concept around its resolution. The pain-point: Allowing merchants self-service capability to update bank account information within their Shift4 processing account.

Security points, fraud vectors, and malicious actors quickly complicate the process of account changes. The complexity of the process, coupled with the opportunity to lighten the load for their support team, made the Self-Service Suite a perfect launchpad to experiment and explore what a business process automation tool could do for Shift4.

Shift4 experimented with simple process automation tools, all of them expensively priced for automation capabilities that were elementary at best. After trialing dozens of underwhelming tools, a Google search connected Shift4 with Decisions.

"The enthusiasm of the Decisions team was infectious: 'Let's show it to you, let's prove it to you, let's build you something now.' That enthusiasm, coupled with the proof-of-concept showing true utility, made everything feel right." **BRENDAN LAUBER**

Shift4 knew exactly what they wanted to accomplish with automation technology, and Decisions had the tools and know-how to get them moving quickly across the finish line with a comprehensive solution.

PRODUCT IMPLEMENTATION

With the support of Decisions, Shift4's proof-of-concept was put into immediate production, successfully allowing users to complete self-service bank account changes. The Decisions workflow and rules engine respond to internal and external front-end forms, streamlining all of the tasks that were previously reviewed and processed manually.

With Decisions, Shift4 is able to create dashboards/visual representations of what customers use and need within their processes. If a merchant pain-point is detected, Shift4 has the flexibility to adapt their process with the click of a button - an unimaginable feat for their static legacy applications.

Shift4 integrates with in-house servers and applications to send emails, text messages, and interact with SQL servers, prioritizing consistent and efficient merchant communication and data management.

Shift4 can depend on Decisions visual designers to translate 1-to-1 with their business teams. Developer Corey Anderson notes the benefits: "We no longer have to create abstractions to share our flows. Everyone is in-tune with what our process does under-the-hood, maintaining true transparency of the development process between teams." This clarity lets Shift4 circumvent roadblocks and miscommunications, expediting every stage of design, development, and implementation.

RESULTS & IMPACT

Since successfully automating self-service banking changes, Shift4 has added applications to the suite such as self-service profile changes and managing authorized contacts on accounts. Shift4 has reduced their manual labor by 25%, ultimately saving 10 days of manual labor per user request.

Shift4 captures their conservation of team resources through an internal KPI counter within the merchant self-service application suite. Corey Anderson explains "this KPI data directly correlates to time saved within our internal support team, and is all completely automated through Decisions."

In addition to lightening the load of their internal support team, Decisions lends true transparency into Shift4's processes. By measuring the speed of task completion through merchant, employee, and system performances, Decisions answers questions such as:

- Time spent implementing backend updates
- Merchant's time spent filling-in forms
- Number of notifications sent to merchant before process completion

This data provides valuable insight to Shift4 processes, empowering their employees to operate with greater efficiency, making it easier than ever to serve clients based on their actual needs and performance rather than speculation.

ABOUT DECISIONS

Decisions is leading the Automation Revolution. Decisions is one complete automation solution for Fortune 2000 financial services and healthcare companies. Customers use the Decisions Intelligent Process Automation (IPA) platform to write applications and build automations to fix customer experiences, modernize legacy applications, and automate anything and everything in their business. Visit [Decisions.com](https://decisions.com) to learn more about the Automation Revolution.

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