

CASE STUDY: **IBOTTA**

Delivering high-quality end user experiences with workforce support

OVERVIEW

Ibotta, a cash back shopping app company, turned to CloudFactory to help manage its receipt moderation process and reduce the burden on internal teams. We provide 24x7 support, with a team verifying information on receipts such as item, amount, and transaction date.

Services Used

+ Elastic Managed Workforce



Web

ibotta.com



Industry

Retail



Headquarters

Colorado, USA



Company Size

251-500

MEET OUR CLIENT

Ibotta is a cash-back shopping app that large consumer brands use to showcase popular products. Customers can select those products, buy them at one of the hundreds of retail partners available in the app, and earn rebates by taking a photo of their receipt and submitting it through the app. Launched in 2012, Ibotta has more than 35 million downloads and is one of the most frequently used shopping apps in the United States.

The challenge is matching the items on a receipt with the items that a shopper selected in the app. For the best user experience, the process needs to be fast. And to maximize value for retail consumers and Ibotta's partner brands, the process must be accurate.

The company's proprietary optical character recognition (OCR) system matches the vast majority of receipts automatically. But some receipts require human expertise for verification. Crowdsourced workers resolve a portion of those receipts. For the rest—which still amounts to thousands of receipts a day—Ibotta relies on one last line of defense: a group of human moderators dedicated to resolving the hardest cases.

THEIR CHALLENGE

At the time, this last line of defense consisted of Ibotta employees and local freelance workers. The solution wasn't ideal. "It's challenging work," says Zev Barsky, Ibotta's Vice President of Operations. "It can be repetitive, incredibly detail-oriented, and it can get very expensive. The majority of our receipts are done automatically, but the number that goes to this final moderation step is still substantial."

During holiday shopping seasons, the number of receipts requiring moderation swelled as users flocked to the app. "There were days in the company's history," says Barsky, "where literally everybody, up to the CEO, had to hop into the moderation queue and check receipts just so we could get those rebates into customers' hands."

When keeping up with the increasing workload became too much to handle, Barsky set out to find a better solution. "I looked at a number of different outsourcing vendors, including some in Colorado that claimed to offer a high level of accuracy," says Barsky. "I also explored the potential for doing this overseas, researching vendors all over the world that provide the kind of data-management support we needed."

The new vendor needed to meet or exceed current performance benchmarks immediately, and then achieve 10–15% better accuracy and nearly 50% more efficiency, as measured in processing time. "We set some really

STATS

15%

HIGHER ACCURACY RATE

12,000

HOURS OF WORK DELIVERED
PER MONTH

50%

DECREASE IN PROCESSING
TIME

THEIR CHALLENGE CONTINUED...

aggressive goals up front.” says Barsky. “We ended up weeding out a number of vendors because they weren’t up to the challenge.”

OUR SOLUTION

CloudFactory emerged as the leading contender, combining its professionally managed workforce with technology that provides a unified workspace for teams, dedicated messaging channels, collaboration tools, and worker engagement tracking.

“CloudFactory came in with a really clean and well-described set of ideas around performance management, scaling, and elasticity to move volume up and down based on our needs as a high-growth company,” says Barsky.

Ibotta ran a pilot program to test our capabilities using existing baselines and performance metrics and “the team performed beautifully.” From there, Ibotta began to transition its final-stage moderation over to CloudFactory.

CloudFactory can monitor worker engagement and gather metrics on productivity. As workers gain more Ibotta experience, they get closer to achieving their target goals. “The time that it took CloudFactory workers to get up to speed on the work became shorter and shorter,” says Barsky.

Today, CloudFactory provides Ibotta with the technology and people to handle more than 12,000 hours of work per month, allowing Ibotta to focus on its users, improving its product and growing its business. Now, Ibotta is better prepared for the annual holiday season. “The CloudFactory team flexed up and we sailed through our busiest time of the year without breaking a sweat.”

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– Zev Barsky, Ibotta VP of Operations

THE RESULTS

Barsky and his team were impressed with how well the CloudFactory team adjusted to the nuances of the work and its context in American culture. “There were multiple occasions when CloudFactory’s team had better brand awareness than I did,” says Barsky.

Ibotta’s CloudFactory team has expanded to include workers in both Nepal and Kenya. “It feels good to provide work where it is needed, and we get high-quality execution while we’re making a difference in developing nations,” says Barsky. “I’ve appreciated the direction they’re taking their business in terms of resilience and ability to scale, and we’ll have a nice long relationship with CloudFactory going forward.”

Since partnering with CloudFactory, Barsky and his team have added use cases, expanding the work that the CloudFactory team does for Ibotta. With CloudFactory’s combination of people and technology, Ibotta’s future looks merry and bright