Cancellation and Refund Process Flow

Project Name: Cancellation and Refund Process Flow
Objective: Streamline and automate the cancellation and refund process for both prepaid and COD orders to enhance user experience and reduce operational inefficiencies.
Time Period:4th Jan - 20 Jan
Team Size: 7 members

- Product Manager
- UI Designer
- Tech Team
- Customer Support team
- Ops Team
- QA Testers (PM)

Roles and Responsibilities

- Managed product roadmap and maintained feature backlog.
- Collaborated with stakeholders to define requirements and process improvements.
- Conducted user research and analyzed support tickets to identify pain points in the cancellation process.
- Prioritized features and enhancements based on business needs and user feedback.
- Monitored process performance metrics to ensure system efficiency and compliance.

Key Challenges & Solutions

- **Challenge**: High dependency on manual support interventions for order cancellations and refunds.
  Solution: Integrated backend API calls to automate cancellation initiation and refund processes.
- **Challenge**: Delayed refunds for prepaid orders due to approval bottlenecks.
  Solution: Implemented an automated approval system and real-time notifications for both users and operations teams.
- **Challenge**: Lack of visibility for users regarding refund status.
  Solution: Enhanced user communication with automated email and WhatsApp updates at key process stages.

Features Delivered

- Automated Self-Cancellation: Enabled users to cancel orders directly via the website (My Profile > My Orders).
- Support Dashboard Integration: Developed a feature for support agents to manage cancellations and refunds seamlessly in case of COD payment to gather details of user.
- API Integration: Automated the backend processes for both COD and prepaid refund scenarios.
- Refund Approval Flow: Introduced approval processes for refund validation and execution.
- Real-Time Notifications: Automated user communication through email and WhatsApp updates.

Metrics & Results (Impact Analysis)

- Reduced average cancellation processing time by 17% .
- Increased user satisfaction score by 57% in a week {Measured through CSAT score}.
- Decreased refund processing errors.
- Enhanced operational efficiency with almost 40% as the team could answer more calls and messages in a day.

Tools & Technologies Used

- Product Management: Clickup, Whimsical
- Data Analysis: Google Analytics, Clarity
- Design Collaboration: Figma
- Backend Integration: Shopify APIs, PAYU APIs
- Communication Platforms: WhatsApp Business Integration- Limechat, Email Automation - Brevo

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Stakeholder Engagement

- Collaborated with cross-functional teams, including customer support, development, and operations.
- Conducted regular sync-ups to gather feedback and align on process improvements.
- Secured buy-in from senior management for automation initiatives.

Learnings & Key Takeaways

- Importance of automating repetitive processes to enhance user experience and operational efficiency.
- Early stakeholder engagement is critical for smooth implementation and process adoption.
- User communication and transparency play a significant role in maintaining user trust during cancellations and refunds.

Supporting Visuals

Cancellation Process

User places an order

Orders Unfulfilled – cancelled before delivery
- User initiates cancellation
  - User requests Self-cancellation through website (My profile page > My orders)
    - COD
      - Backend API call is triggered
      - Order is cancelled on Shopify
      - User receives cancellation Mail + Whatsapp
    - Prepaid
      - Cancellation process is initiated + (Mail + Whatsapp message 1 to user informing cancellation initiataion)
      - Order is cancelled on Shopify
      - PAY U API is triggered
        - Success
          - User receives refund in the source a/c in 5-12 days.
          - User receives cancellation Mail + Whatsapp
        - Failure
          - Goes in Alert in Portal
          - Manually Process the refund
          - User receives refund
          - User receives cancellation Mail + Whatsapp
  - User reach us through support
    - Order is searched by the agent on Ops Dashboard using Order ID
    - Agent cancels order on the dashboard
      - COD
        - Backend API call is triggered
        - Order is cancelled on Shopify
        - User receives cancellation Mail + Whatsapp
      - Prepaid
        - Order is kept on Hold
        - Order goes for Approval to process refund
          - Approved
            - Cancellation is initiated
            - PAY U API is triggered
              - Success
                - User receives refund in the source a/c in 5-12 days.
                - Order is cancelled on Shopify
                - User receives cancellation Mail + Whatsapp
              - Failure
                - Goes in Alert in Portal
                - Manually Process the refund
                - User receives refund
                - Order is cancelled on Shopify
                - User receives cancellation Mail + Whatsapp
          - Reject
            - Order is processed
            - User receives order related messages

Orders Fulfilled – Return/Refund Case
- Orders returned by User
- Orders(Items) received in warehouse
- QC Approval
  - Approved
    - COD
      - Support Team calls user
      - They get users bank details for refund to be credited
      - Team enter the details on ops portal and click submit
        - Approved
          - PAY U API is triggered
            - Success
              - User receives refund in the source a/c in 5-12 days.
              - Order is marked returned on Shopify
              - User receives cancellation Mail + Whatsapp
            - Failure
              - Goes in Alert in Portal
              - Manually Process the refund
              - User receives refund
              - Order is marked returned on Shopify
              - User receives cancellation Mail + Whatsapp
        - Reject
          - No Refund to user
          - User is informed through call/msg
    - Prepaid
      - Goes for Approval to process refund
        - Approved
          - PAY U API is triggered
            - Success
              - User receives refund in the source a/c in 5-12 days.
              - Order is marked returned on Shopify
              - User receives cancellation Mail + Whatsapp
            - Failure
              - Goes in Alert in Portal
              - Manually Process the refund
              - User receives refund
              - Order is marked returned on Shopify
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