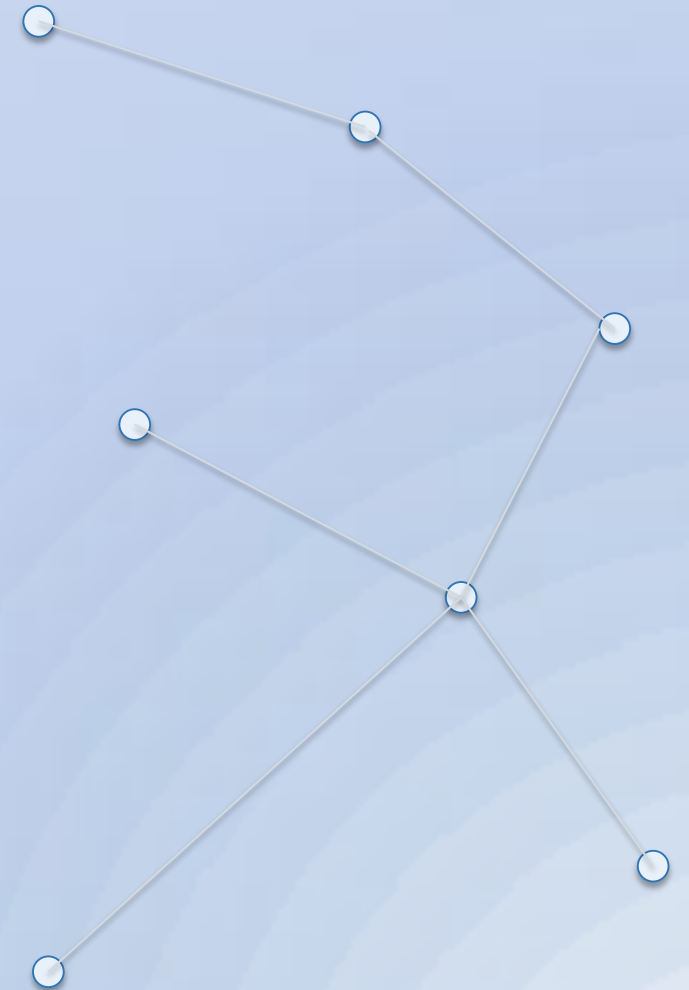


Optimizing the Odin Cloud to LunchTab Balance Migration Process

Current-State Assessment and Future-State Proposal

Business Process Improvement Initiative

Plato Choi | June 2026



Automation reduces the balance migration cycle from 15.4 hours to 3 minutes.



Manual reconciliation

The current workflow requires repeated cross-referencing across independent datasets.

Key finding

Routine work dominates

Staff effort is spent searching, validating, switching files, and copying balances.

Key finding

Exception-driven future

Automation processes safe matches and reserves human review for unresolved cases.

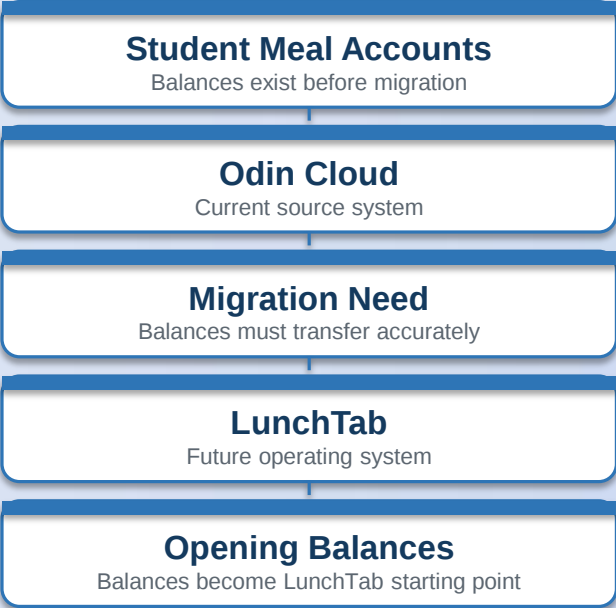
Key finding

Recommendation Adopt the future-state migration workflow as the standard operating procedure for Odin-to-LunchTab balance transfers.

Source: Current-state time study and final v0.4.0 automated run.

Executive Takeaway The executive decision is operational adoption, not further investigation; the problem and improvement are both measurable.

Balance migration requires accurate transfer between two systems with different identifiers.



Current Challenge

Independent Systems

Odin and LunchTab maintain different account identifiers.

Financial Accuracy

Balances must transfer to the correct family account.

Manual Reconciliation

Exported records do not directly map to the final import row.

Legacy Population

Historical and graduated accounts remain in the source population.

Business Objective Transfer balances accurately, efficiently, and with sufficient auditability during the system migration.

Executive Takeaway The operational challenge is identity reconciliation across systems, not merely moving data from one file to another.

The current process is constrained by manual reconciliation across disconnected datasets.

Multiple Data Sources

No single export contains all fields needed to complete the transfer.

Process observation

No Common Identifier

Each account requires translation before a destination can be confirmed.

Data structure review

Routine Work Dominates

Searching, switching files, validating, and copying consume operator effort.

Time study

Equal Effort Per Record

Active, legacy, and graduated accounts receive the same investigation path.

Population review

Linear Scalability

More records create proportionally more labor without productivity gain.

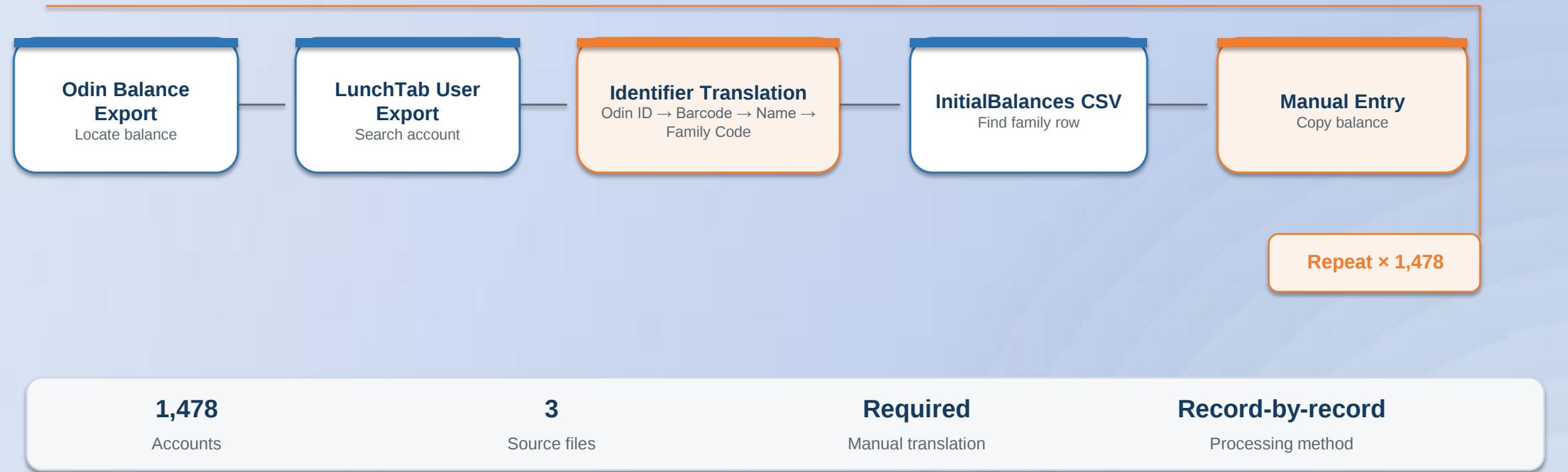
Throughput analysis

Evidence basis: process observation, data structure review, population review, and time study.

Executive Takeaway

Manual reconciliation, not balance transfer, is the dominant operational constraint in the current state.

Every account follows a repeated lookup-and-copy workflow before transfer can occur.



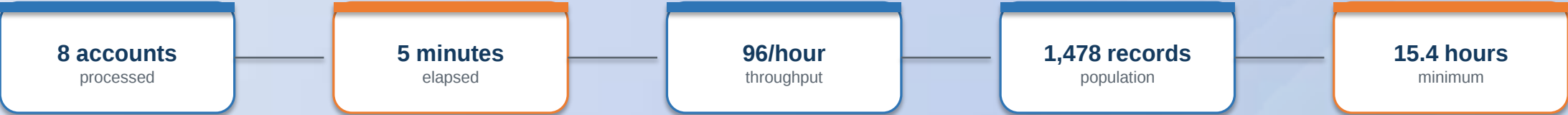
Process observation The same workflow is applied regardless of whether the account ultimately requires migration.

Executive Takeaway The current process spends most of its effort establishing the correct destination record before any balance is transferred.

Current throughput requires approximately 15.4 hours of uninterrupted manual effort.



Calculation logic



Baseline assumptions

- No interruptions
- No corrections
- No lookup mistakes
- Constant operator speed

Assessment Actual production effort is expected to exceed the baseline after interruptions, corrections, and exceptions.

Source: timed dry run using current migration records.

Executive Takeaway

The measured baseline establishes a conservative minimum; operational conditions would likely increase total staff effort.

Thousands of routine human actions are required before balances can be transferred.

12k-15k

Estimated manual interactions

Conservative range across 1,478 accounts

Search

Locate IDs and rows

Switch

Move across files

Validate

Confirm names and family

Copy

Enter balance

Repeat

Perform for each record

Effort model

1,478 accounts × ~8-10 routine interactions per account = ~12,000-15,000 interactions

This is an estimate of repeated user actions such as searching, switching files, validating records, copying balances, and repeating the workflow.

Routine work

Search, translate, validate, copy, repeat.

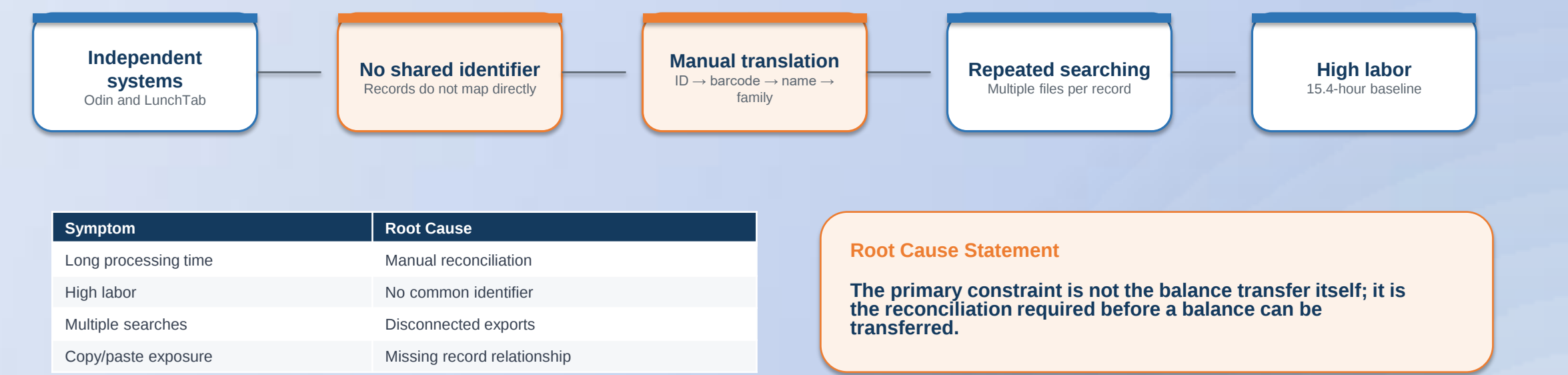
Business judgment

Resolve ambiguous or exceptional records.

Executive Takeaway

The opportunity is not simply faster typing; it is removing thousands of repetitive actions while preserving review where judgment is needed.

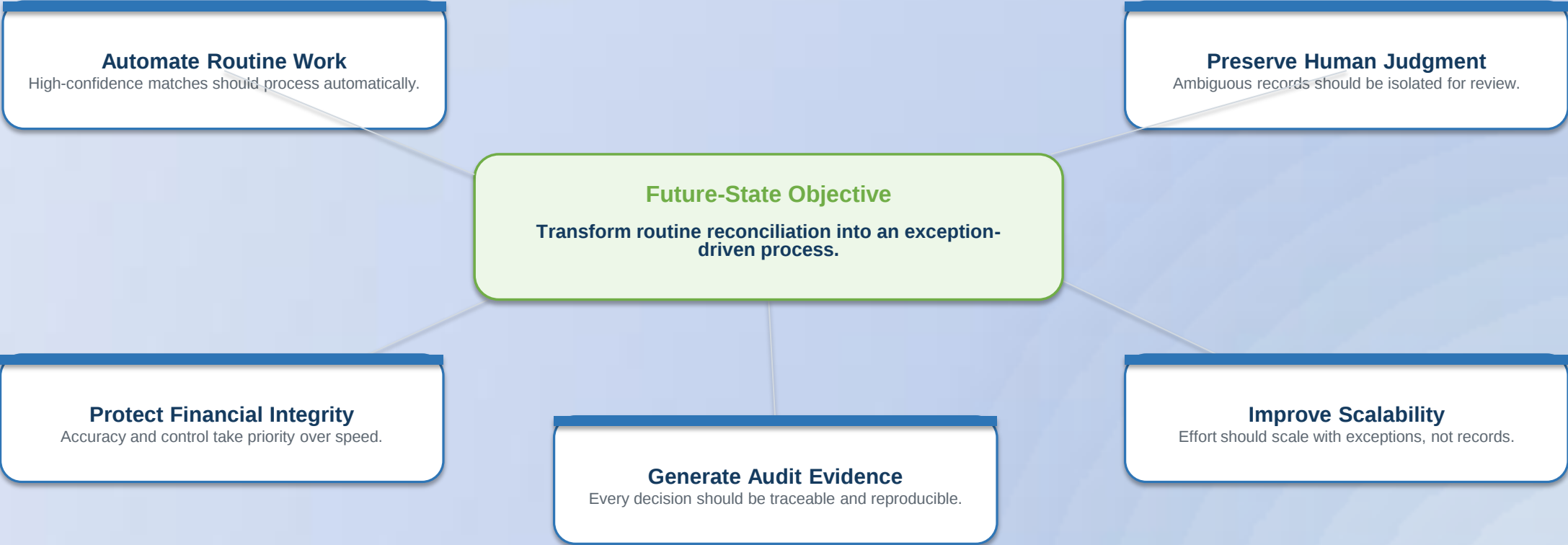
The absence of a shared identifier creates the primary operational bottleneck.



Executive Takeaway

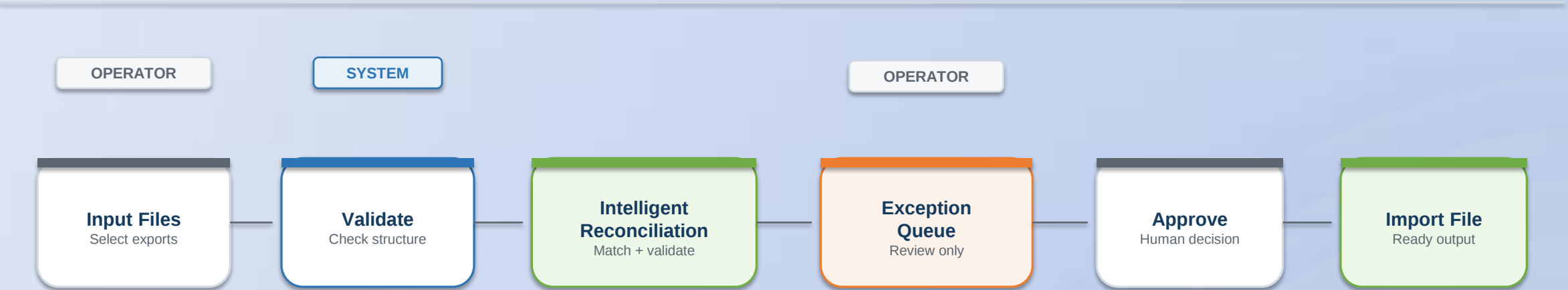
Meaningful improvement must address identity reconciliation, not only manual balance entry.

The improved process should automate routine work while preserving review for exceptions.



Executive Takeaway The future state is designed around governed exception management, not unchecked automation.

The future-state process shifts work from manual processing to exception review.



How the future process satisfies the design principles

Process Stage	Design Principle Supported
Validation	Protect financial integrity
Intelligent reconciliation	Automate routine work
Exception queue	Preserve human judgment
Audit outputs	Generate evidence
Approved import	Improve scalability

Executive Takeaway

Routine records move through the process automatically; staff time is reserved for uncertain or exceptional records.

The future-state workflow improves efficiency, governance, and scalability simultaneously.



Source: manual baseline calculation and final v0.4.0 automated run.

Executive Takeaway

The operating model changes from transaction processing to exception management.

Multiple validation layers protect financial integrity before import.



Business Risk	Future-State Control
Wrong user	Identity validation + name check
Duplicate records	Exception queue
Wrong amount	Control totals
Bad import	Blocked output when checks fail
Limited traceability	Accepted/rejected audit reports

Governance Principle

Routine processing is automated; business accountability remains with controlled human oversight.

Executive Takeaway

Automation does not remove accountability; it strengthens control by making uncertain records visible and auditable.

Adopt the future-state migration workflow as the standard operating process.

RECOMMENDATION

Approve operational adoption of the automated Odin-to-LunchTab balance migration workflow.

Operational Value

Reduces routine manual effort and improves throughput.

Rationale

Business Value

Improves governance, auditability, and process consistency.

Rationale

Strategic Value

Creates a repeatable migration framework for future needs.

Rationale

Success Measures

Automated match rate

Exception rate

Operator handling time

Processing accuracy

Post-import corrections

Decision Requested

Approve the future-state workflow and monitor realized benefits during operational use.

Executive Takeaway

The recommended decision is adoption with benefit tracking, not additional manual processing.