

from the DealerOn Product Design Team

UX Case Study

# Inventory Imports & Exports

## Driving efficiencies for internal teams

Q2 2023 | Automotive

# In this study

Learn how the Product Design team contributed to the Inventory Imports and Exports project

## The ask

**Combine the inventory imports and exports screens** to help customer support reps find the imports and exports data needed to solve customer issues quickly

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## The research

Interviews with Customer Support and Data Support teams, analysis of Salesforce tickets, and discussions with the Inventory product manager

**We uncovered inefficiencies for the Customer Support teams:** They needed to enter tickets with the Data Support team to get the data needed to resolve customer cases.

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## The solution

**Allowing Customer Support reps to download exports data themselves** cut down the level of effort for both Customer Support and Data Support teams

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## The outcome

**9.4% reduction in exports-related Data Support team tickets**

# Meet the Product Team



# The Ask

Exploring Inventory Imports and Exports

# What

This project explored how **combining the inventory imports and exports** screens could make life easier for customer support teams

# Why

We had a hunch that having the Imports and Exports screens separate made it **difficult for customer support team members to find the imports and exports data needed to solve customer issues** quickly.

Solving this issue supported the organizational goal of **workflow efficiency for our support teams**

# What is inventory imports and exports?

Inventory Imports and Exports are two screens in the CMS used to see how data flows between inventory data sources (such as VAuto) and inventory data destinations (such as our dealer sites)

# The Research

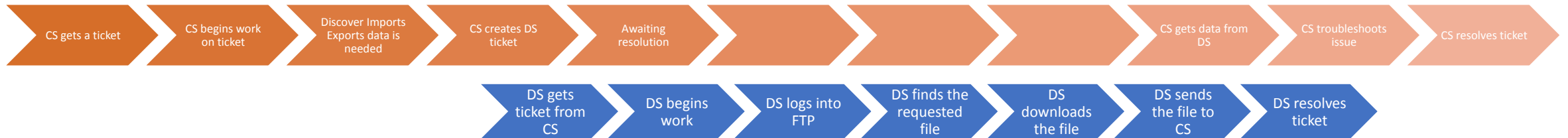
Uncovering process inefficiencies



# Interviews, Salesforce tickets, and Product Manager Insights uncovered...

Interviews with Customer Support and Data Support team members, analysis of Salesforce tickets, and discussions with the Inventory product manager uncovered a source of inefficiencies for the Customer Support teams: **Customer Service reps needed to enter tickets with the Data Support team to get the data they needed to resolve customer cases.**

# The workflow we uncovered



CS = Customer Support  
DS = Data Support

# Hypothesis

Allowing Customer Support reps to download Exports data themselves would dramatically cut down the level of effort for both Customer Support and Data Support teams

# The Solution

Small suggestions, big rewards

# The revised workflow



CS = Customer Support

The revised UI  
launched on June  
2, 2023

Exports List

Dealer ID

5501

Filter by name like

Filter by export ID

Enabled

Both

RESET FILTERS

SEARCH

CREATE NEW EXPORT

Current Dealer ID: 5501

Enabled	Name	Export #	Date of Last Export	Next Export Run	Result of Last Export	# of Dealers	Status	
✓	CarFax Dealer Info	264	6/2/2023, 4:19:41 AM	6/3/2023, 4:00:00 AM	Some Dealers Failed VIEW BY DEALER	3503	Not Processing	<div>FAST TRACK</div> <div>EDIT DEALERS</div> <div>EDIT DESTINATION</div> <div>EDIT FEED</div> <div>↓</div> <div>RE-DROP EXPORT</div>
✓	CarFax Vehicle Information	261	6/2/2023, 6:19:52 AM	6/3/2023, 4:00:00 AM	Some Dealers Failed VIEW BY DEALER	3503	Not Processing	<div>FAST TRACK</div> <div>EDIT DEALERS</div> <div>EDIT DESTINATION</div> <div>EDIT FEED</div> <div>↓</div> <div>FAST TRACK</div>

We added these download buttons

# On-boarding

An updated SKB and a Pendo Guide on the Exports screen informed visitors that they could now download raw exports data.

Exports List

Dealer ID

Filter by name like

Filter by export ID

Enabled  
Both

RESET

Enabled ↓	Name ↕	Export # ↕	Date of Last Export ↕	Next Export Run ↕	Result of Last Export ↕	#		
✓	(ReVamp) CUDL - Ryan Tech	114	10/11/2023, 5:13:25 AM	10/12/2023, 4:00:00 AM	Export Failed VIEW ERROR DETAILS	35	Not Processing	<div>FAST TRACK</div> <div>EDIT DEALERS</div> <div>EDIT DESTINATION</div> <div>EDIT FEED</div> <div>↓</div>
✓	3Birds - Leith Cars	861	10/11/2023, 12:34:20 AM	10/12/2023, 12:00:00 AM	Success	22	Not Processing	<div>FAST TRACK</div> <div>EDIT DEALERS</div> <div>EDIT DESTINATION</div> <div>EDIT FEED</div> <div>↓</div>
✓	AdPearance	292	10/11/2023, 5:18:52 AM	10/12/2023, 4:00:00 AM	Export Failed VIEW ERROR DETAILS	7	Not Processing	<div>FAST TRACK</div> <div>EDIT DEALERS</div>

You can now download raw exports data for some dealers

To access this data, use the download buttons in the right side column

Read more on this feature in the Salesforce Knowledge Base article

# The Outcome

Driving team efficiency



# 9.4% reduction in Data Support team tickets

Over 3 months, an average of 136 exports-related Data Support tickets per month were entered by Customer Support – a 9.4% reduction in average number of tickets over the 2 months prior to the feature launch

[View the reports](#)

Thank you