

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

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.

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

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)

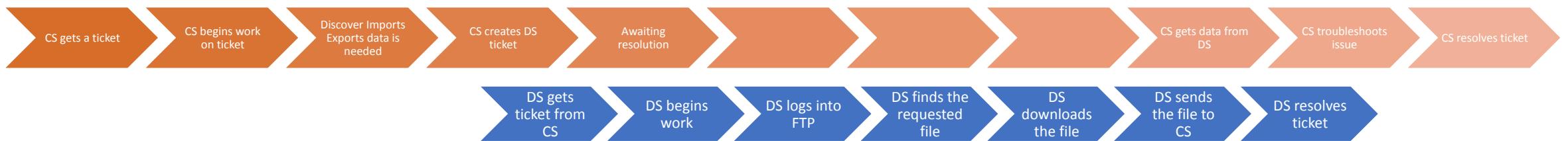
The Research

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	We added these download buttons
✓	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	We added these download buttons

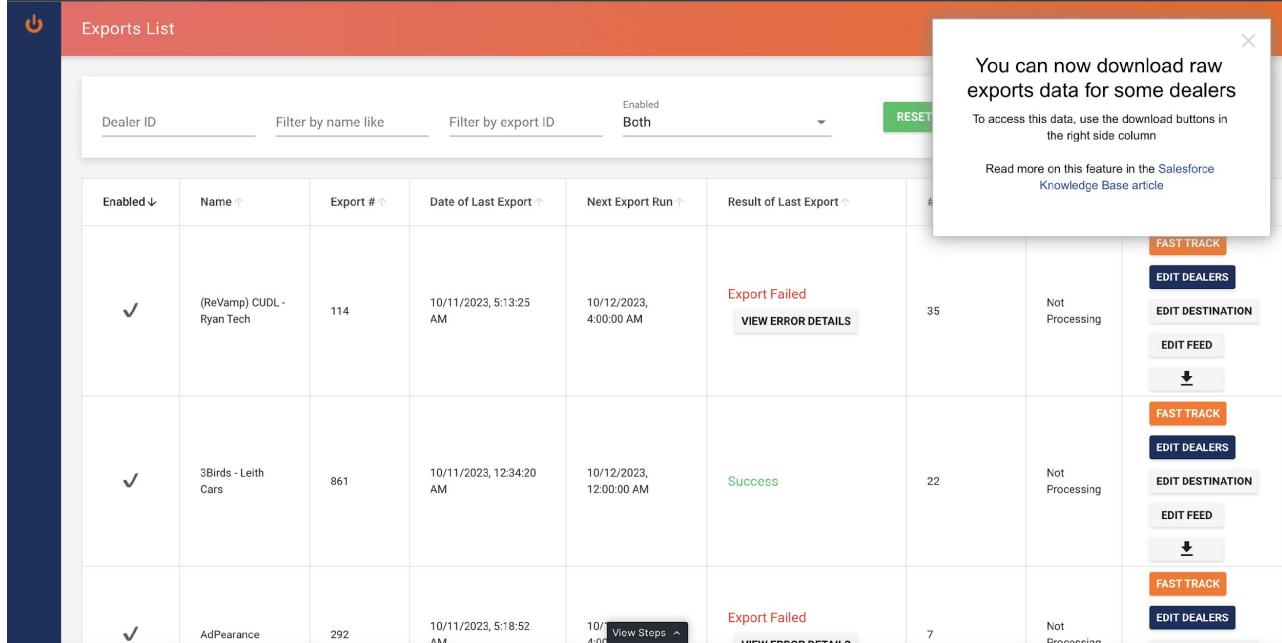
FAST TRACK | EDIT DEALERS | EDIT DESTINATION | EDIT FEED | RE-DROP EXPORT

FAST TRACK | EDIT DEALERS | EDIT DESTINATION | EDIT FEED | FAST TRACK

On-boarding

1/10/2024

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



15

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