

# Mid-Market: CSM Weekly Review

*Continuous Improvement through **R**epeatable, **S**calable,  
**R**eliable Approach & Customer Focus*

March 30 2025

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# CSM: Overview

1

## Completed

- CSM Summary
- Current Week Backlog: 22 [ Bug 6; ProdOps 11; CR 3; Integration 2 ]
- Current Week: Done 5; In Review 1; On Hold for Customer 5; Pending Customer 3
- Current Week New Issues: Bug 5; ProdOps 7

2

## Upcoming Release

- 6.6.3 Release: (01/16) followed by tech upgrade(12/28)

3

## Ongoing Projects

- Apex Solutions Nexus Corp Punchout: Waiting Customer approval for Go Live Date
- AstraTech: Customer Data Sync: - Completed

4

## Customer Projects (New)

- Consignment Warehouse (Global Dynamics) - Waiting on customer
- AstraTech: Location Changes - Completed
- Visionary Co.: Calculate Freight Charge
- Quantum Innovations - B2C Implementation
- Zenith Group - B2C Implementation
- Pinnacle Systems - B2C Implementation
- Veridian Enterprises: B2C Implementation

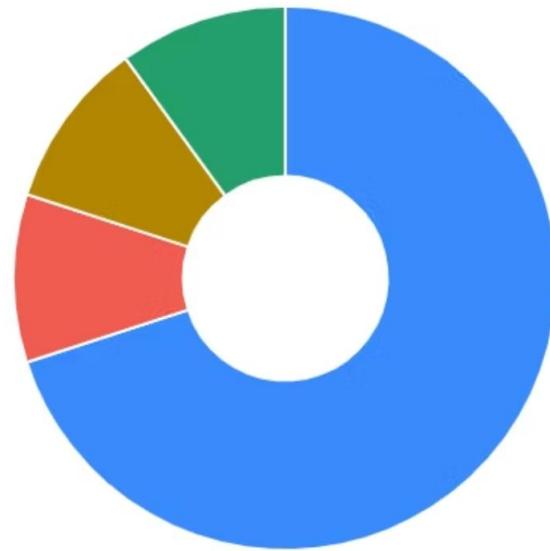
# CSM: Backlog Insights

Data collected: 4.23.2025

Backlog: Issue Type By Customers

Customer	Bug	Integration	ProdOps	Task	T:
Betts Truck Parts	0	0	1	0	1
Harman Heavy Vehicle Specialists Ltd	0	0	1	0	1
Jackson Truck Services Inc	1	0	0	0	1
Kurt's Truck & Parts Co	0	0	1	0	1
PBS Truck Parts / CommPar	0	0	0	1	1
Scientific Brake & Equipment Company	0	1	0	0	1
Tectran	1	0	0	0	1
Temsa Bus Company	1	0	0	0	1
Toledo Spring Parts & Service	0	0	3	0	3
Toth Automotive Inc	1	0	0	0	1
<b>Total Unique Issues:</b>	<b>4</b>	<b>1</b>	<b>6</b>	<b>1</b>	<b>12</b>

Backlog: Issues By Modules



Module	Total Issues: 10
None	7
Order Management	1
Part Availability	1
Site Management	1

SLA Violations

Actionable Insight

# Mid Market Customer Classification

## Class A

1. Summit Haulage Solutions
2. Everest Logistics
3. Apex Transit Systems
4. Peak Brake & Gear
5. Midwest Fleet Innovations

## Class B

1. Prime Parts Depot
2. AquaFlow Services
3. Global Truck Components
4. Precision Auto & Equip.

## Class C

1. ConnectCore Systems
2. Sentinel Truck Components
3. Northern Drive Solutions
4. Bayview Vehicle Repair
5. Aegis Bus Manufacturing

## Class D

1. Riverbend Spring Works
2. Rapid Parts Delivery
3. Guardian Truck Supplies
4. Dyno Brake & Clutch
5. Velocity Automotive Group

# Mid Market Customer Segmentation - Begins January 1, 2025

Proactive Health Checks: Schedule regular reviews for underperforming customers, focusing on catalog completeness, product usage, and ticket volume. Identify and address pain points early on.

Alex

1. Stellar Truck Solutions
2. Apex Auto Components - **Meeting Exists**
3. Velocity Parts Corp.
4. Horizon Fleet Services
5. Prime Component Depot - **Meeting Exists**
6. OmniTech Systems - **Meeting Exists**
7. Nova Transit Group - **Meeting Exists**
8. Summit Suspension Inc. - **Meeting Exists**
9. Global Automotive Supply (Not Active)

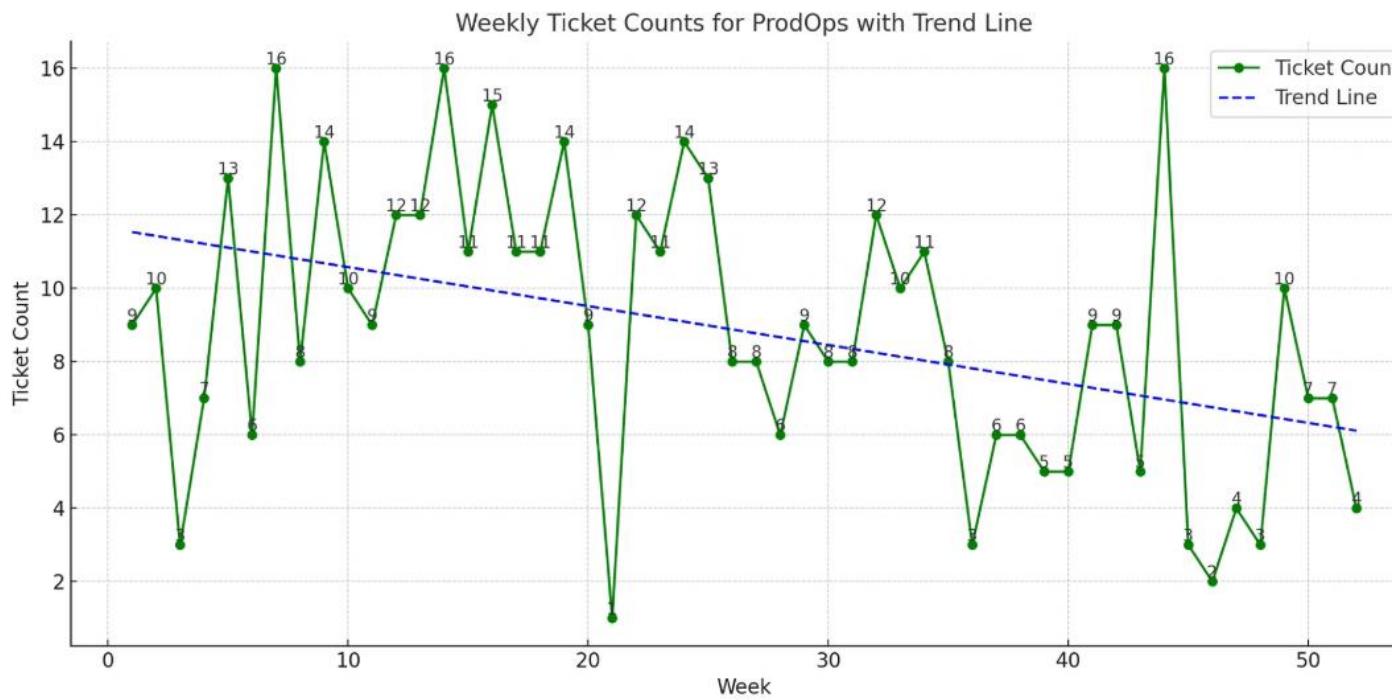
Ben

1. Frontier DriveTrain Co.
2. Zenith Solutions - **Meeting Exists**
3. Elite Auto Spares (Not Active)
4. Dynamic Brake & Coil (DBC)
5. ConnectPoint Logistics

Chris

1. Vanguard Vehicle Systems
2. Great Lakes Fleet Supply
3. Precision Brake & Gear
  - Business Review completed. Best Practices shared on 12/23
4. Rapid Response Parts
5. Keystone Truck & Trailer
  - Business Review completed. Best Practices shared on 12/23
6. Atlas Auto Group
  - Business Review completed. Best Practices shared on 12/17

# ProdOps: Weekly Trending in last 12 months



## Customer Focussed Service Improvement

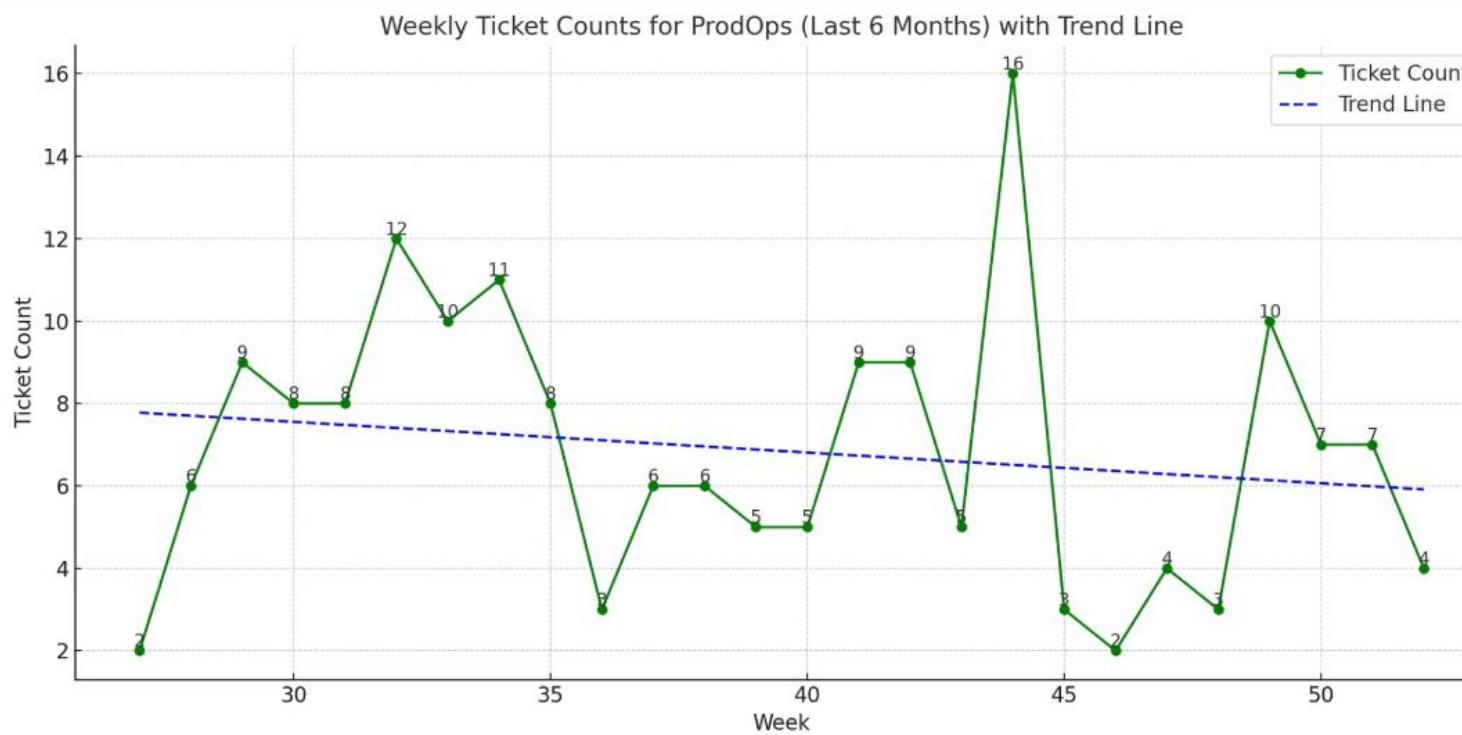
- **ProdOps:** Indicate operational challenges requiring system stability or optimization.
- **Self Service Tools:** Adoption and usage by each customer
- **Educational Campaigns:** Conduct training or webinars for customers with recurring issues to improve system understanding and reduce ticket volumes.

## Projection:

Anticipate a continued reduction in ProdOps ticket volume as the following areas reach maturity:

- VIPAR parts enrichment
- HDA parts enrichment
- Customer data synchronization
- Parts data synchronization

# ProdOps: Weekly Trending in last 6 months



## Customer Focussed Service Improvement

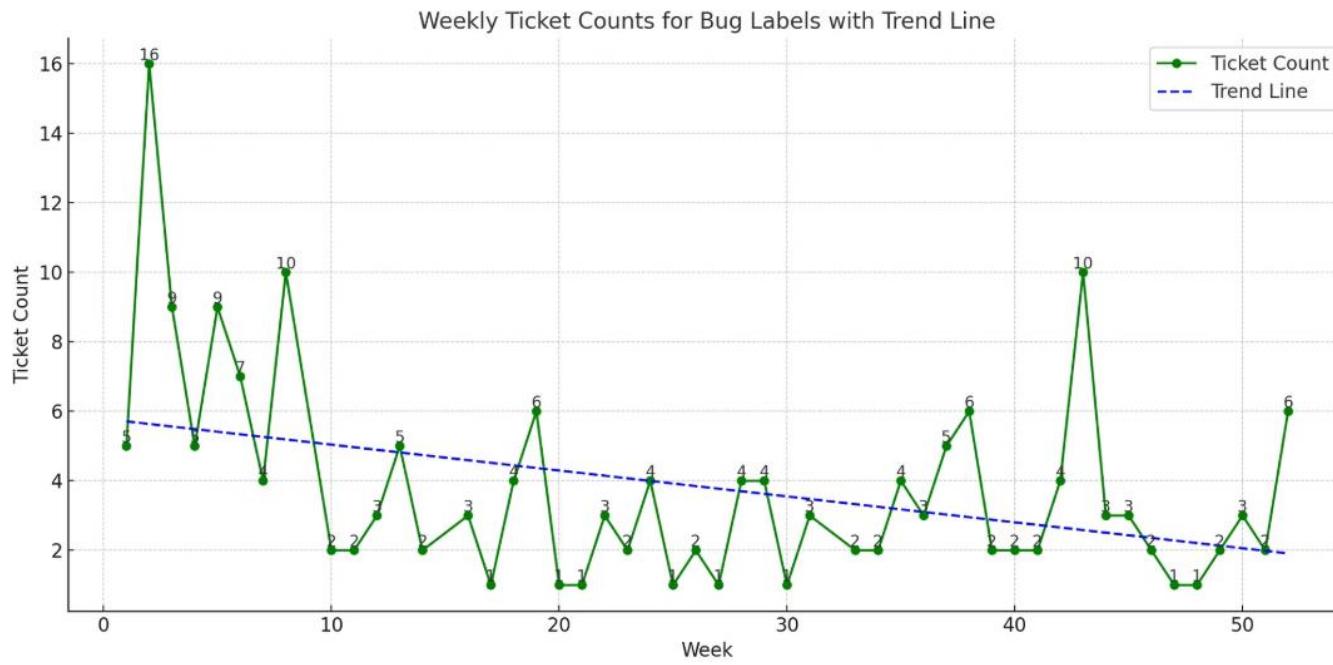
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## Projection:

Anticipate a continued reduction in ProdOps ticket volume as the following areas reach maturity:

- AetherCorp parts enrichment
- Nexus Solutions parts enrichment
- Customer data synchronization
- Parts data synchronization

# Bug: Weekly Trending in last 12 months



## Customer Focussed Service Improvement

- **Bug:** Indicate operational challenges requiring Quality development.
- **Educational Campaigns:** Conduct training or webinars for customers.
- More focus on discovery and requirement collection stage
- Adhere to more focused Quality Assurance.

## Projection:

- More focus on development and quality assurance
- Acquire Business knowledge
- Fix the resource shortage.

# Bug: Weekly Trending in last 6 months

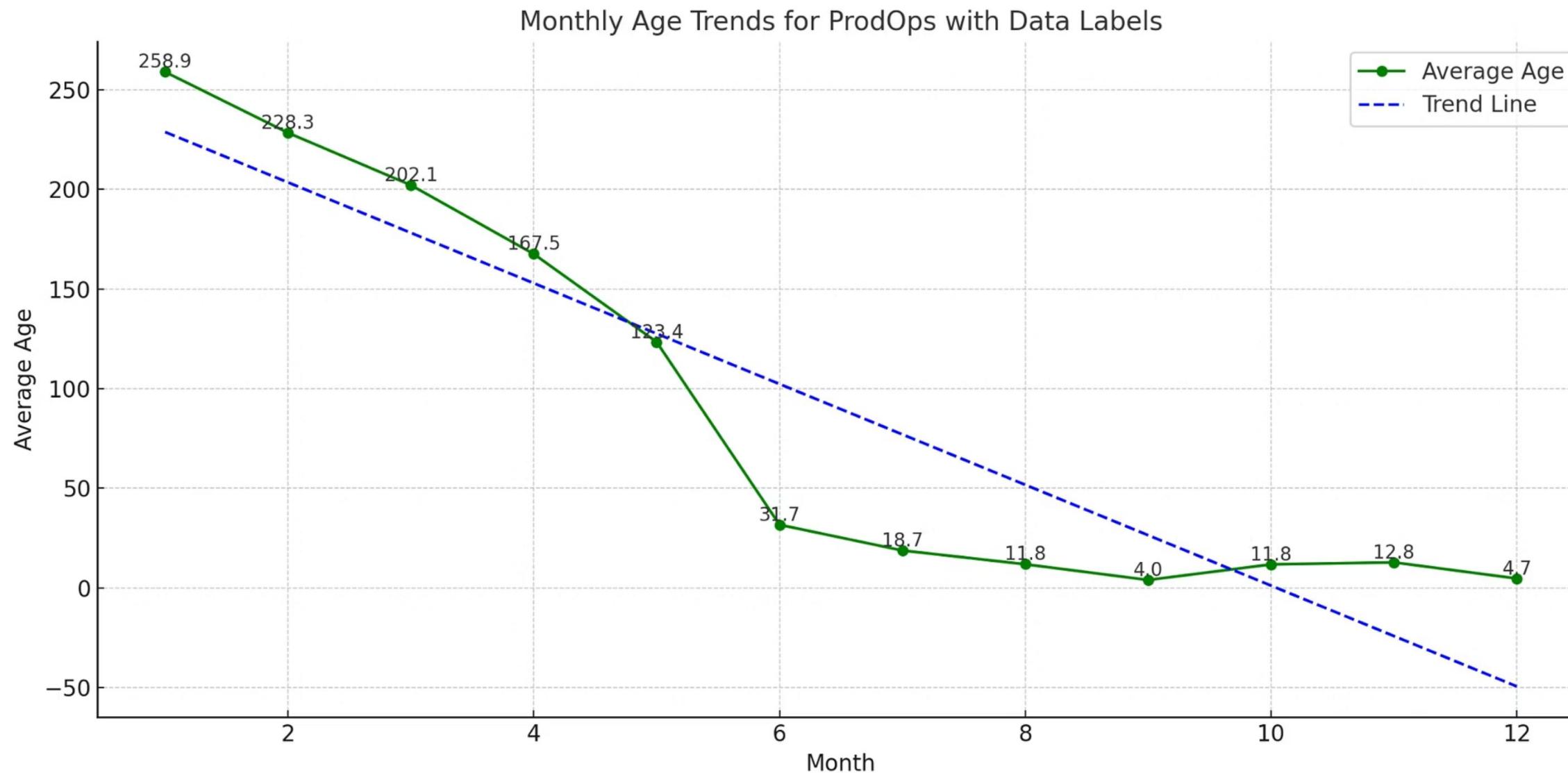
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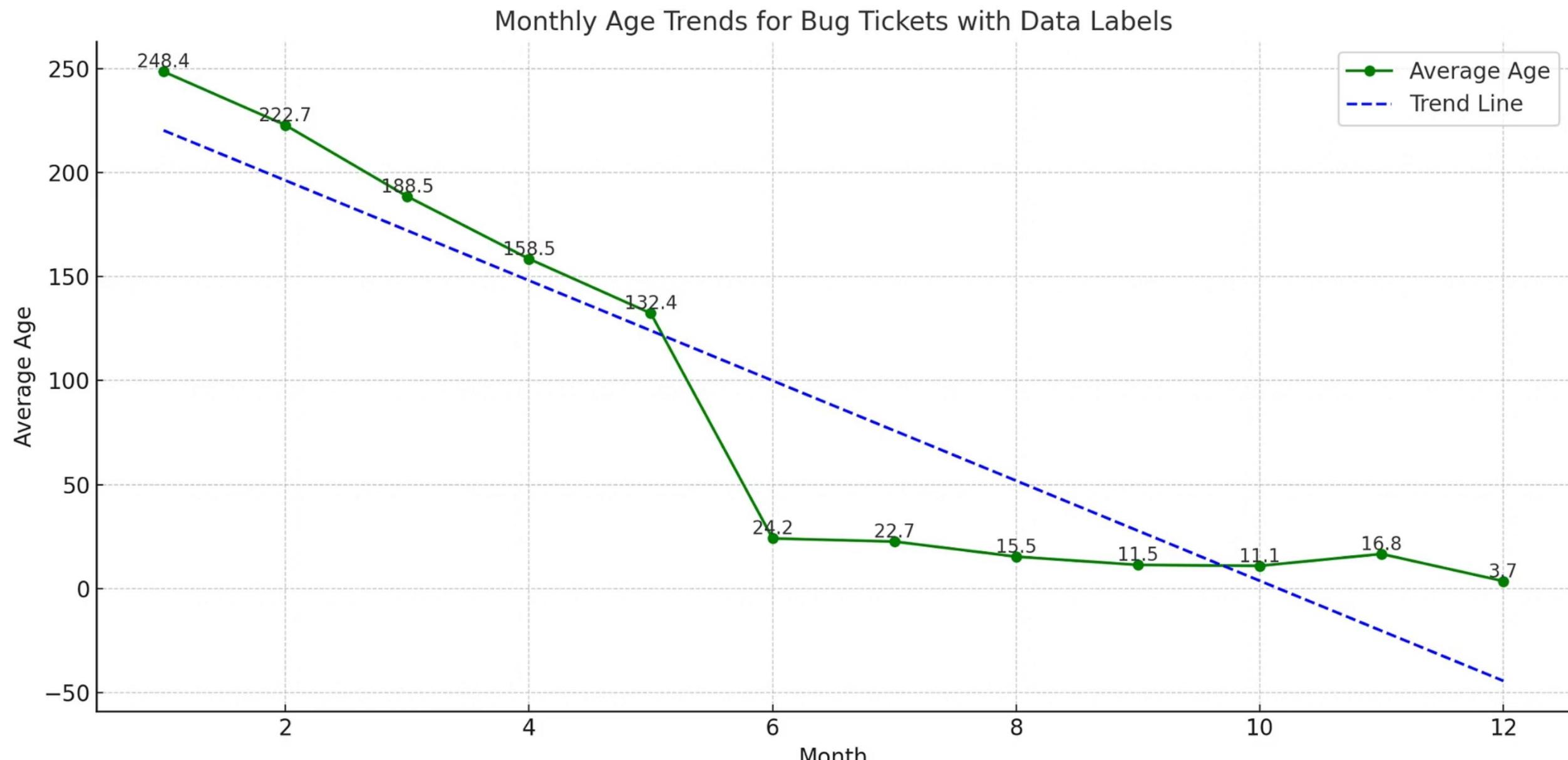
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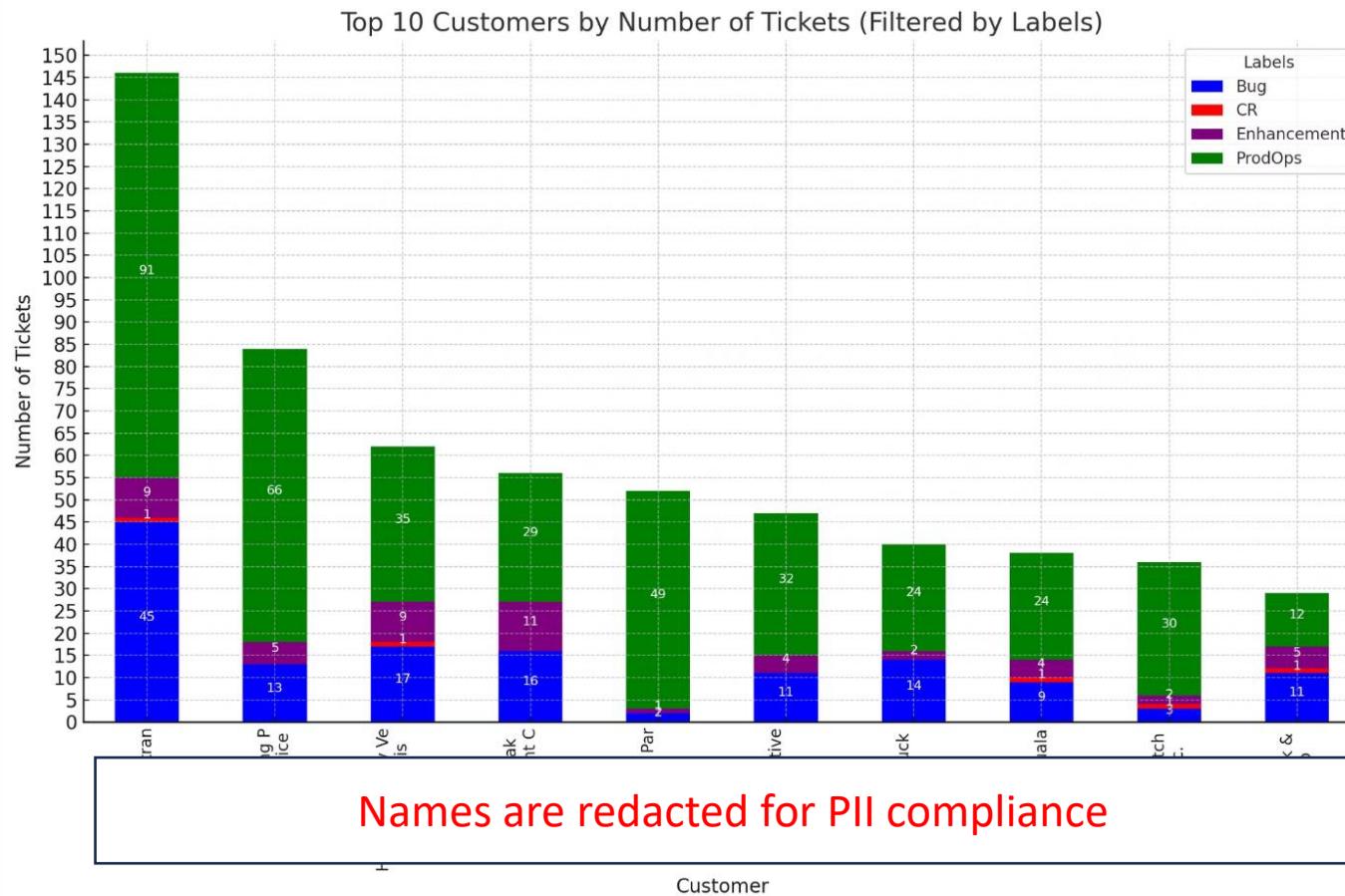
# ProdOps: Weekly Trending of Age in last 12 months



# Bug: Weekly Trending of Age in last 12 months

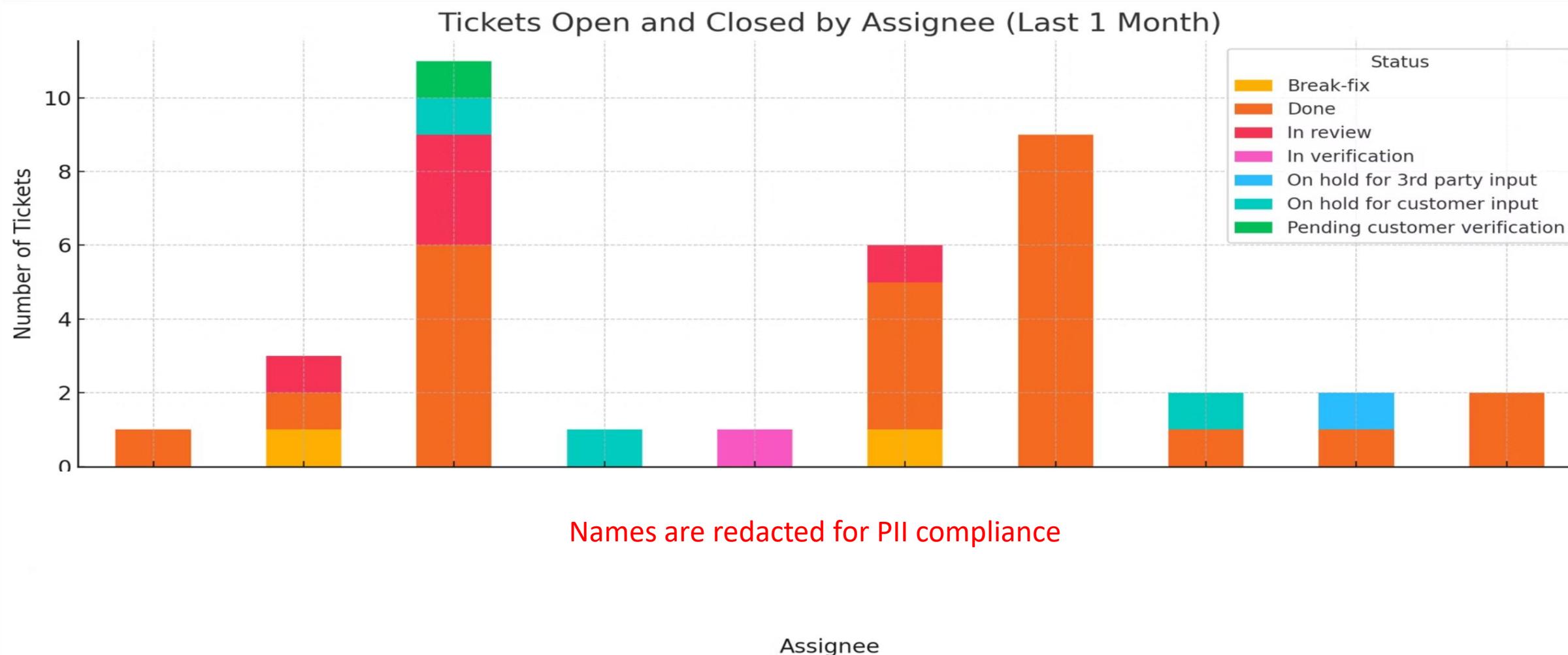


# Ticket Type Distribution among Top 10 Customer Actions (Year 2024)

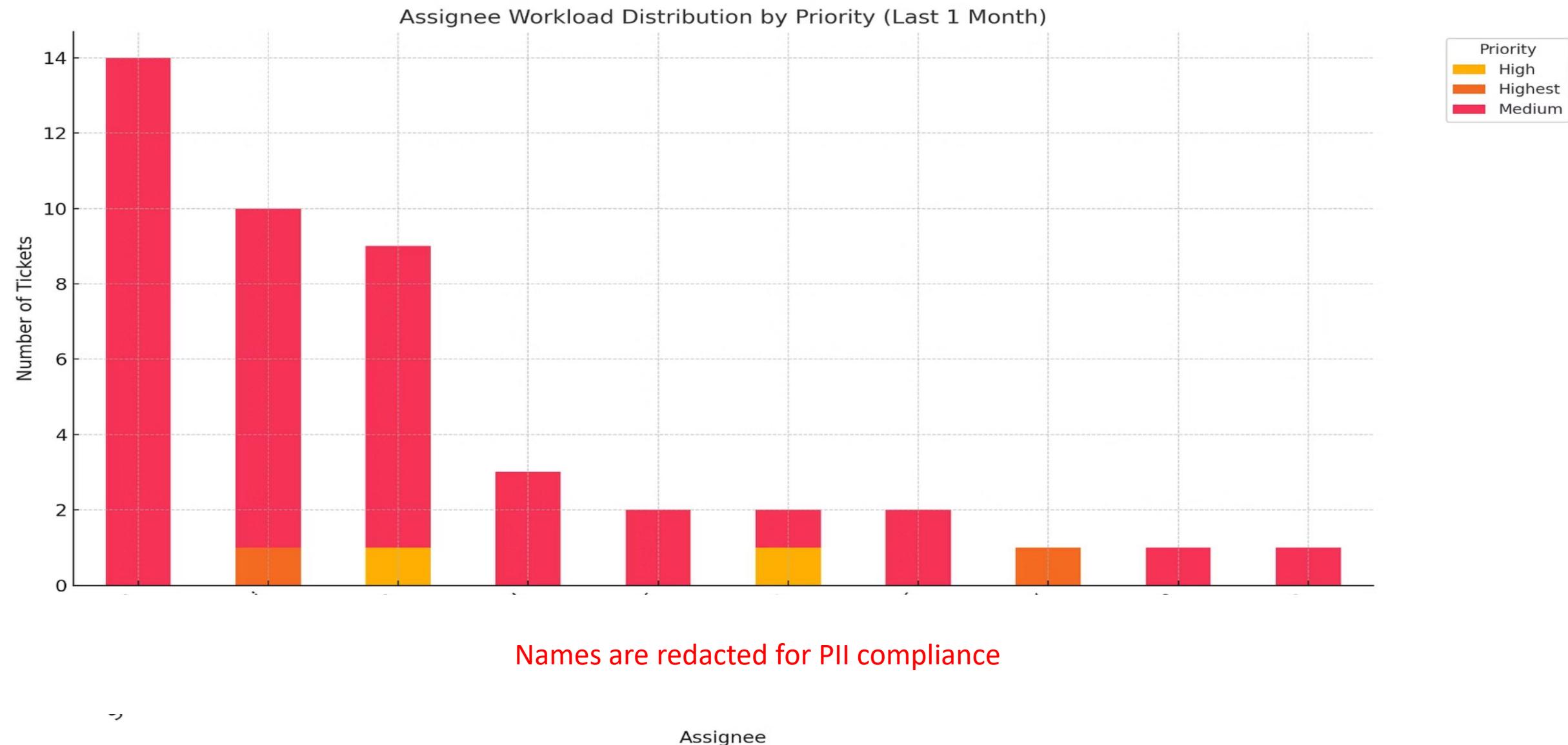


- Customer Focussed Service Improvement
- **ProdOps:** Indicate operational challenges requiring system stability or optimization.
- **Bug:** High counts in this category suggest a need to prioritize quality assurance and bug fixes, especially for the most engaged customers
- **Enhancement:** Enhancement activity reflects customer interest in improving or customizing solutions, a positive indicator of proactive engagement.
- **Enhancement:** Customers actively requesting enhancements are potential partners for co-innovation or pilot programs for new features.
- **Educational Campaigns:** Conduct training or webinars for customers with recurring issues to improve system understanding and reduce ticket volumes.

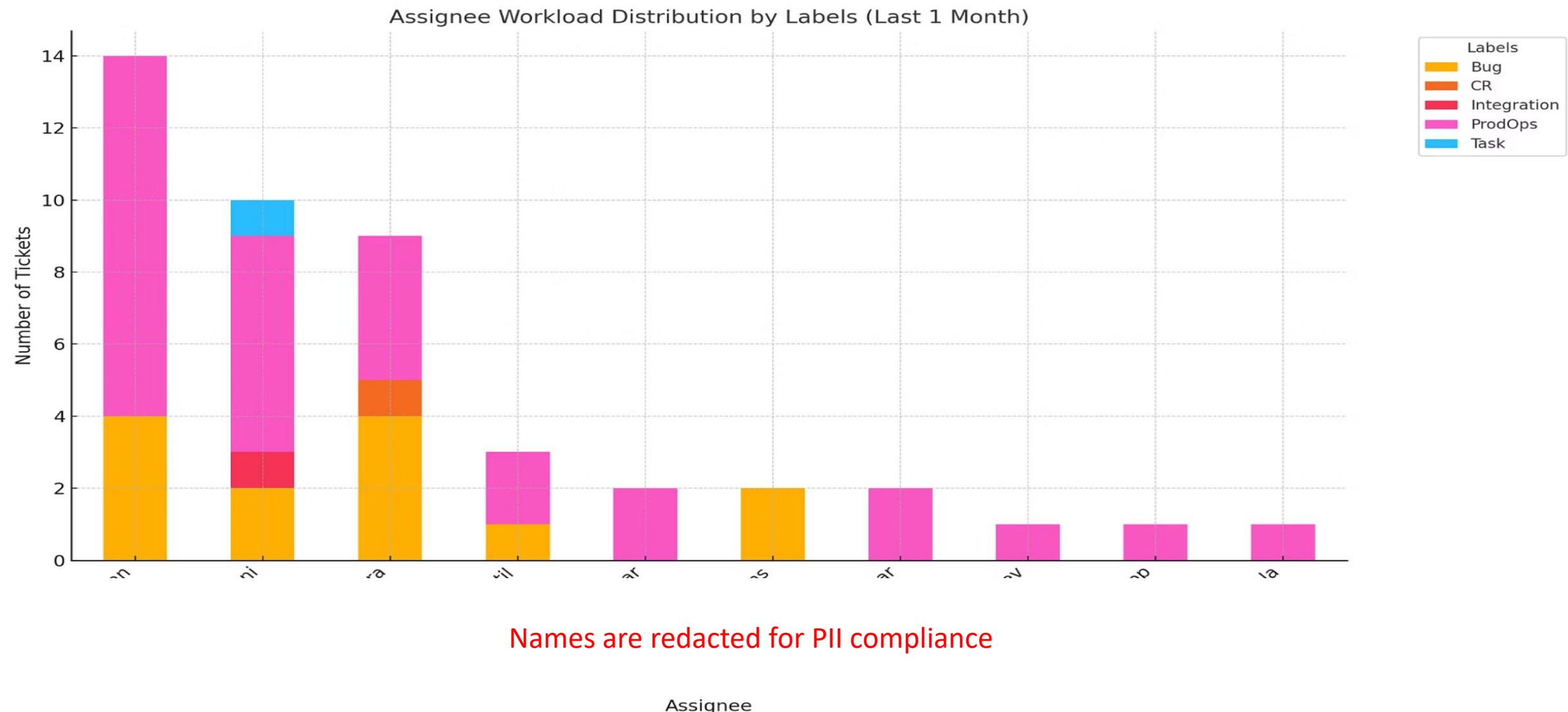
# Tickets Status Distribution: Open vs. Closed by Assignee (Last 1 Month)



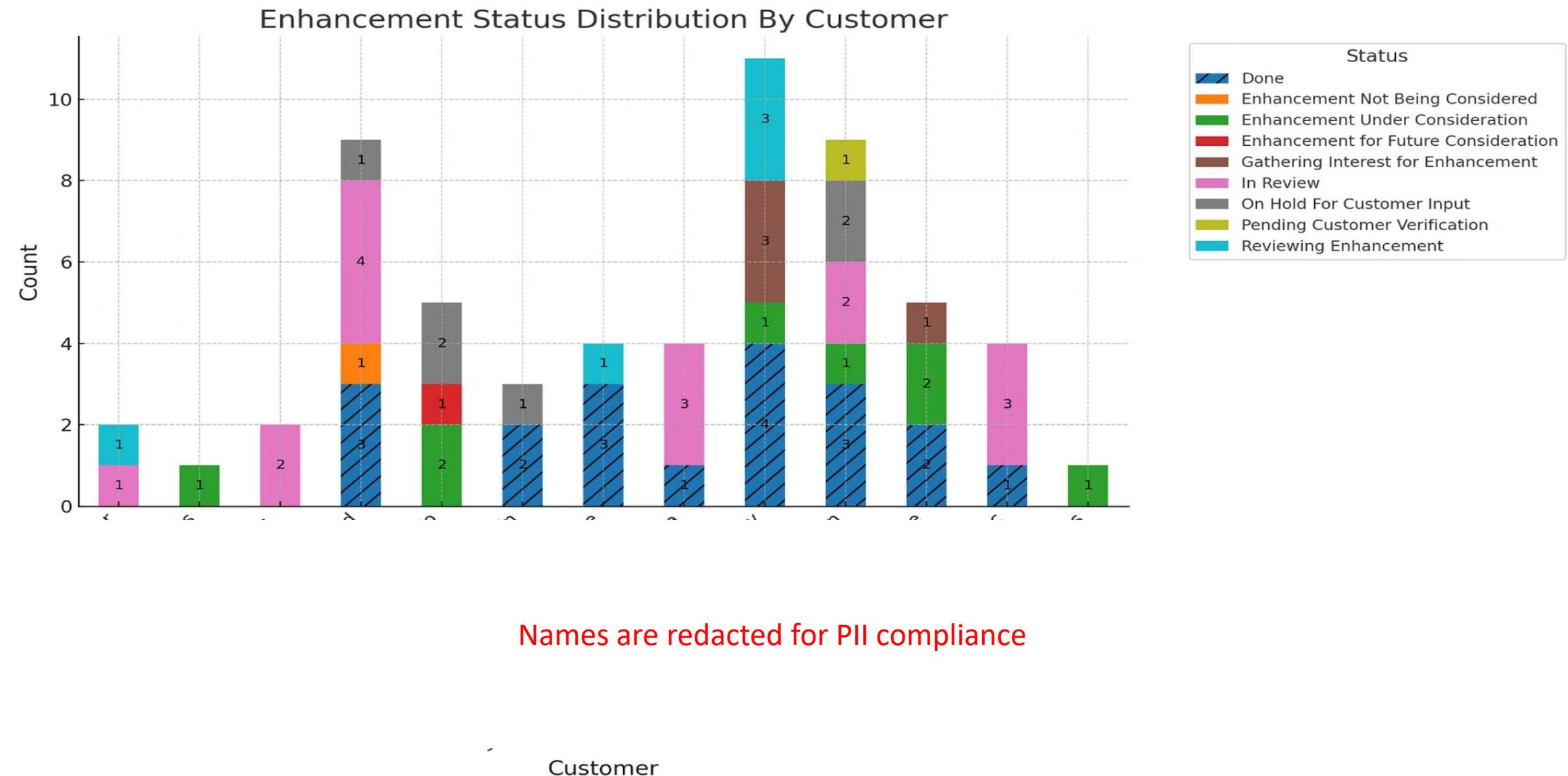
# Assignee Workload Distribution by Priority in last month



# Assignee Workload Distribution by Type



# Enhancements by Customer by Status



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