

Mid-Market: CSM Weekly Review

*Continuous Improvement through **R**epeatable, **S**calable,
Reliable 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

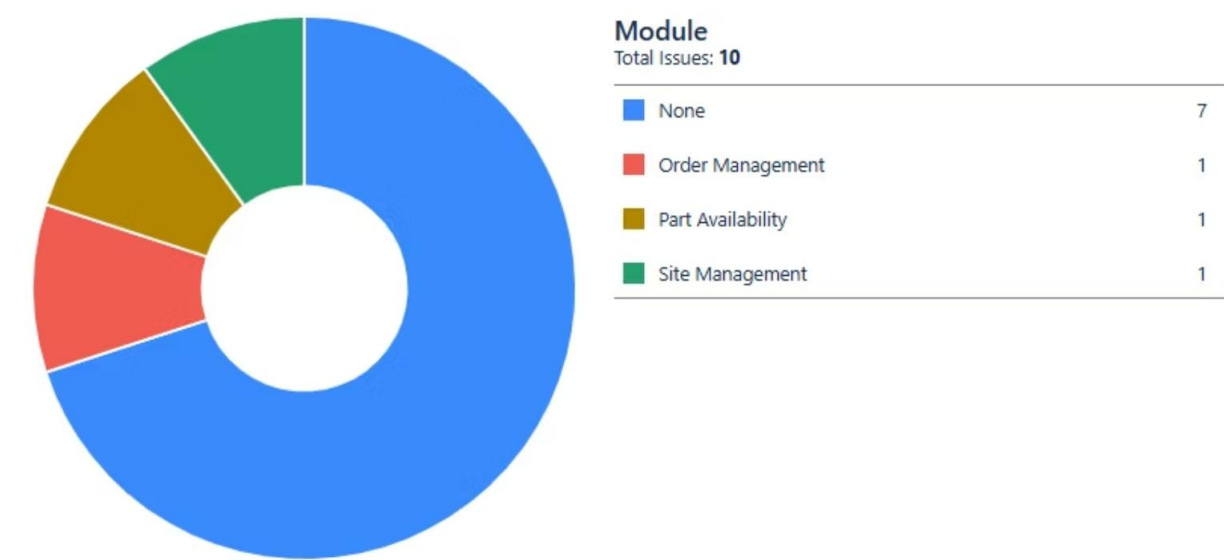
CSM: Backlog Insights

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
Total Unique Issues:	4	1	6	1	12

Backlog: Issues By Modules



SLA Violations

Actionable Insight

Mid Market Customer Classification

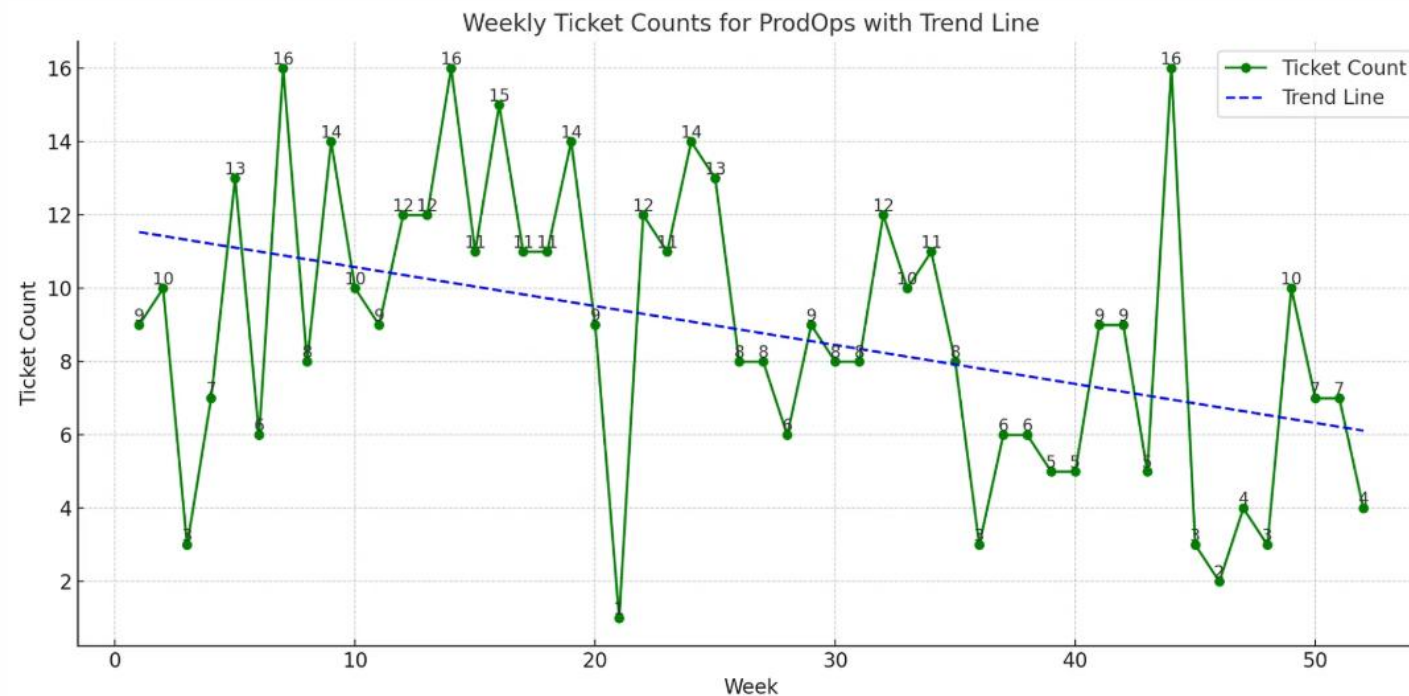
Class A	Class B	Class C	Class D
1. Summit Haulage Solutions	1. Prime Parts Depot	1. ConnectCore Systems	1. Riverbend Spring Works
2. Everest Logistics	2. AquaFlow Services	2. Sentinel Truck Components	2. Rapid Parts Delivery
3. Apex Transit Systems	3. Global Truck Components	3. Northern Drive Solutions	3. Guardian Truck Supplies
4. Peak Brake & Gear	4. Precision Auto & Equip.	4. Bayview Vehicle Repair	4. Dyno Brake & Clutch
5. Midwest Fleet Innovations		5. Aegis Bus Manufacturing	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	Ben	Chris
1. Stellar Truck Solutions	1. Frontier DriveTrain Co.	1. Vanguard Vehicle Systems
2. Apex Auto Components - Meeting Exists	2. Zenith Solutions - Meeting Exists	2. Great Lakes Fleet Supply
3. Velocity Parts Corp.	3. Elite Auto Spares (Not Active)	3. Precision Brake & Gear
4. Horizon Fleet Services	4. Dynamic Brake & Coil (DBC)	<ul style="list-style-type: none">Business Review completed. Best Practices shared on 12/23
5. Prime Component Depot - Meeting Exists	5. ConnectPoint Logistics	4. Rapid Response Parts
6. OmniTech Systems - Meeting Exists		5. Keystone Truck & Trailer
7. Nova Transit Group - Meeting Exists		<ul style="list-style-type: none">Business Review completed. Best Practices shared on 12/23
8. Summit Suspension Inc. - Meeting Exists		6. Atlas Auto Group
9. Global Automotive Supply (Not Active)		<ul style="list-style-type: none">Business Review completed. Best Practices shared on 12/17

ProdOps: Weekly Trending in last 12 months



Customer Focussed Service Improvement

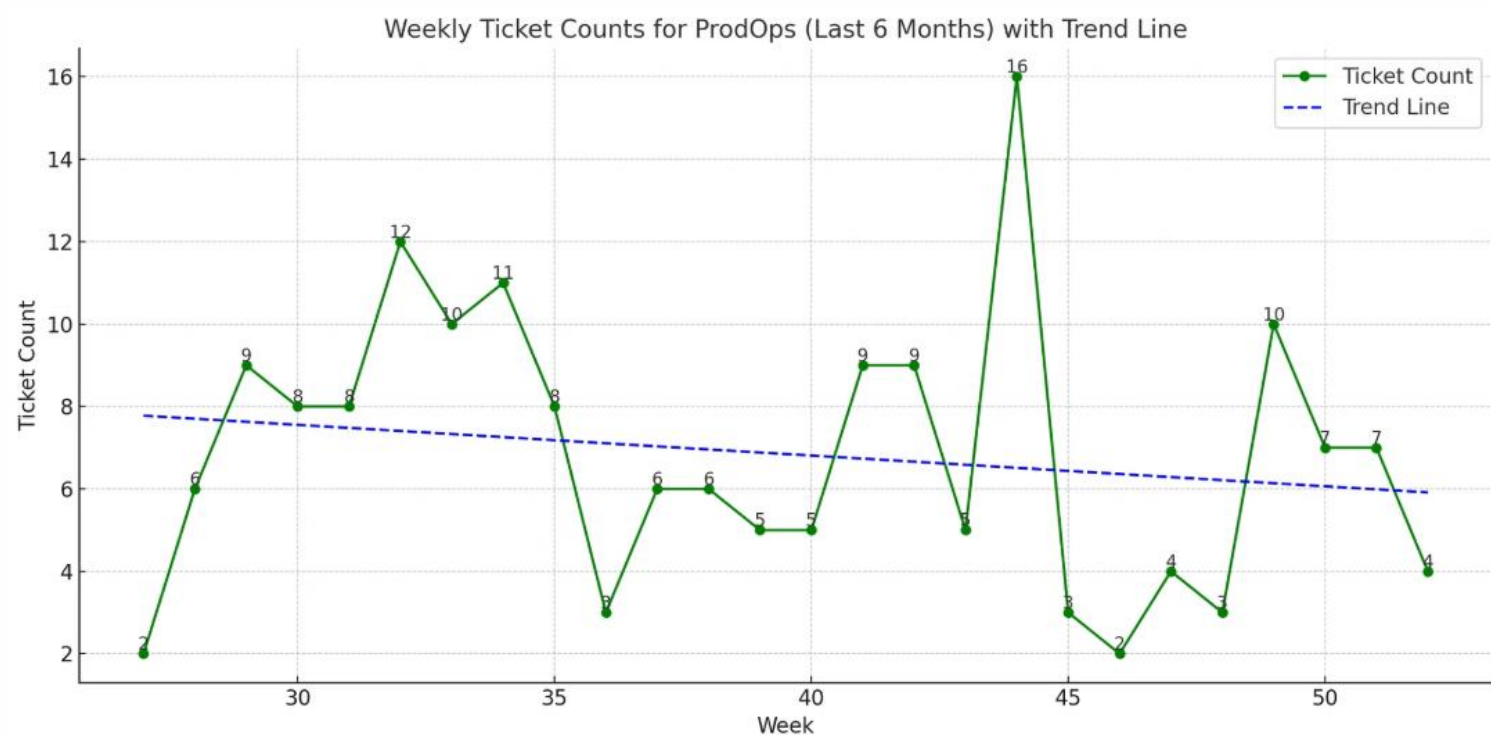
- **ProdOps:** Indicate operational challenges requiring system stability or optimization.
- **Self Service Tools** Adoption and usage by eht customer
- **Educational Campaigns:** Conduct training or webinars for customers with recurring issues to improve system understanding and reduce ticket volumes.

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

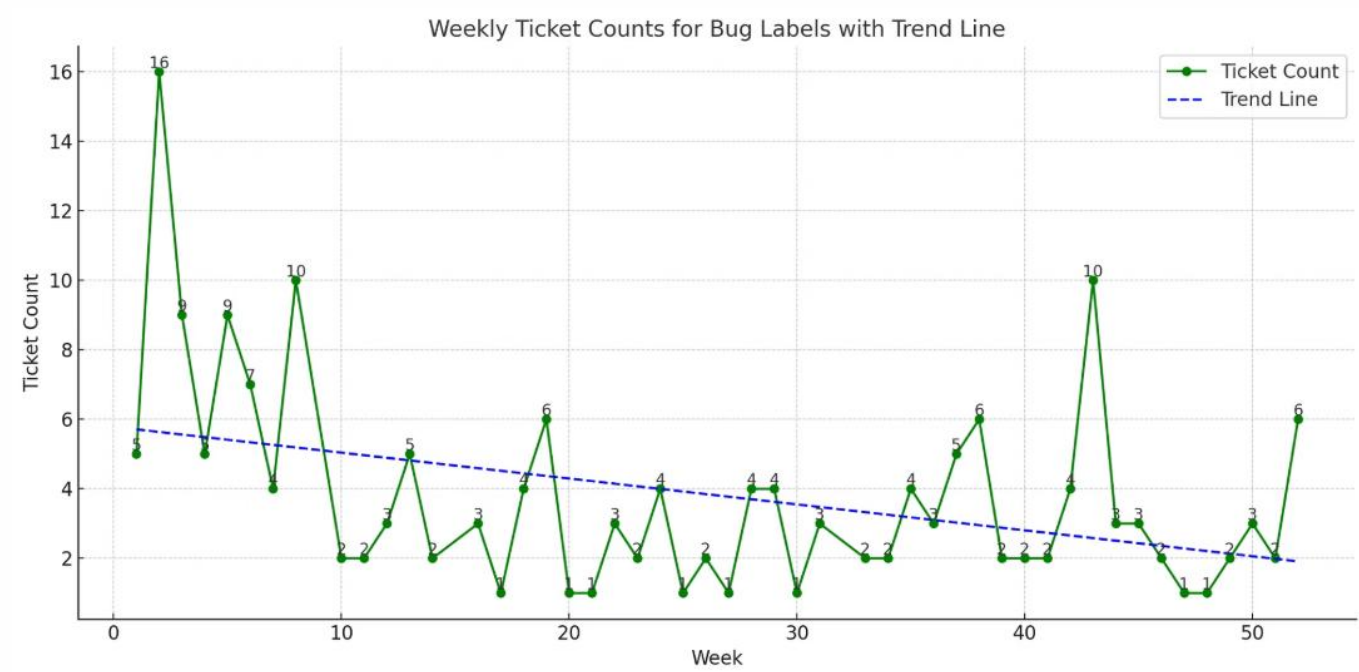
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Projection:

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

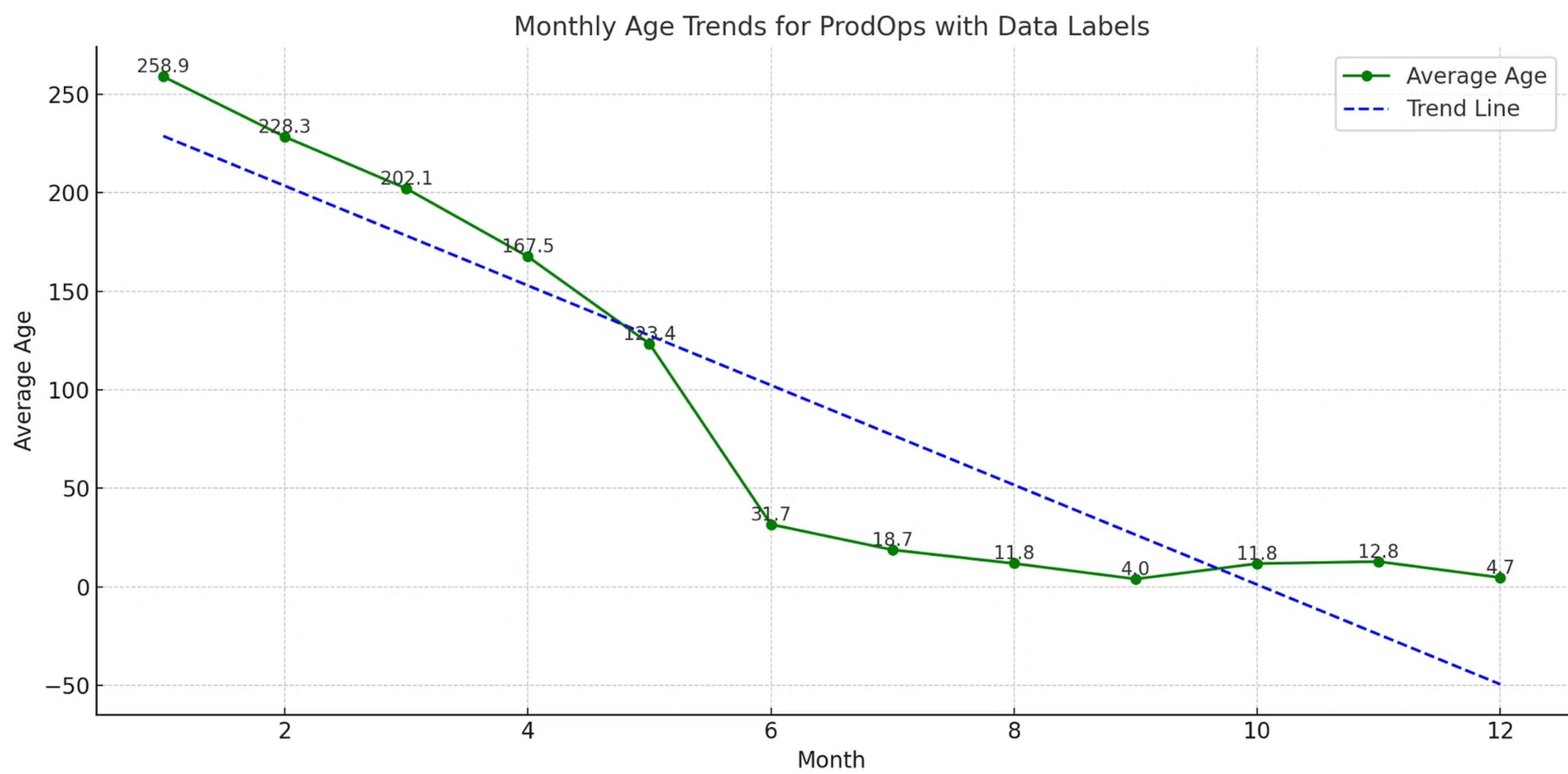
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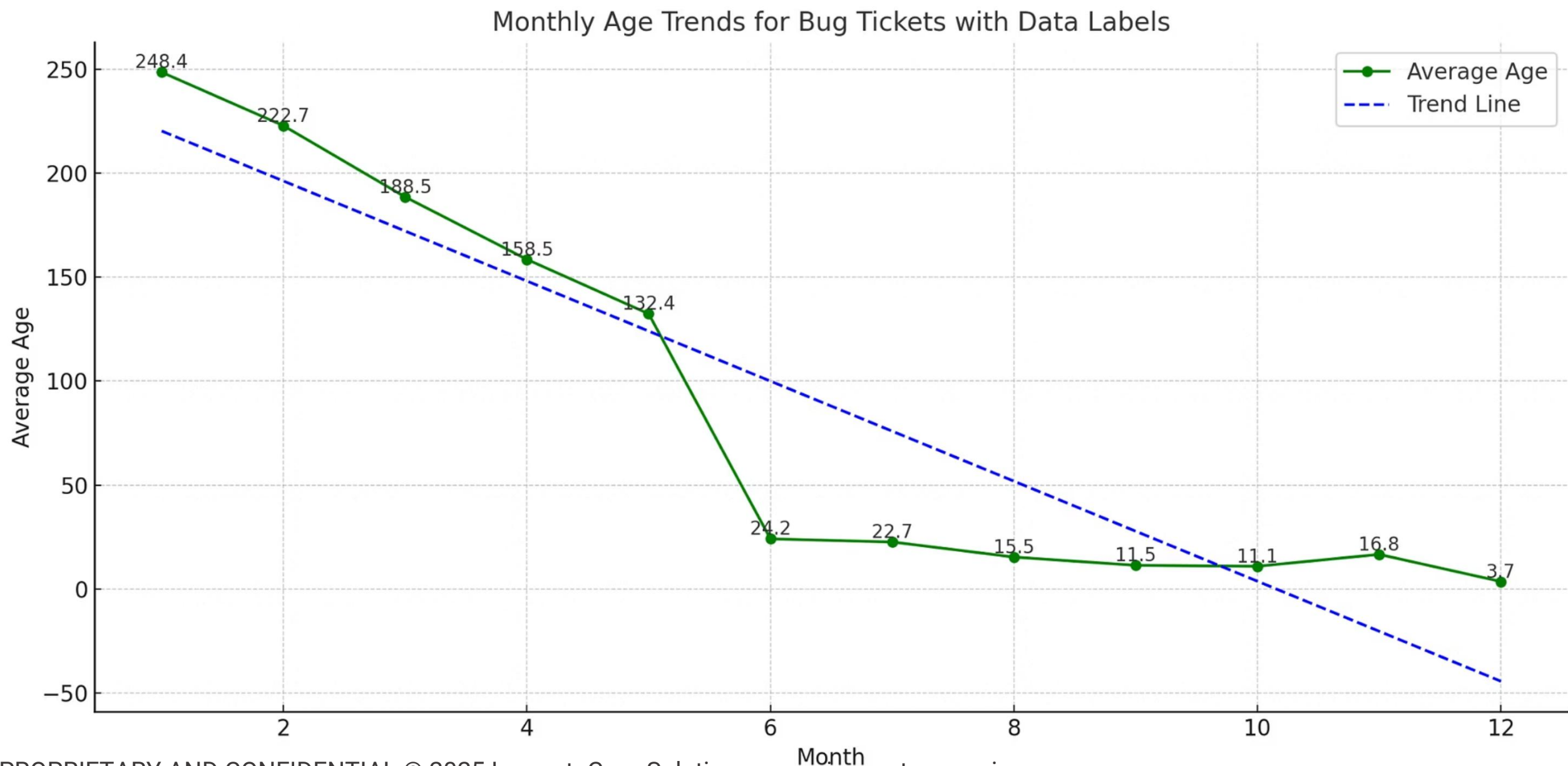
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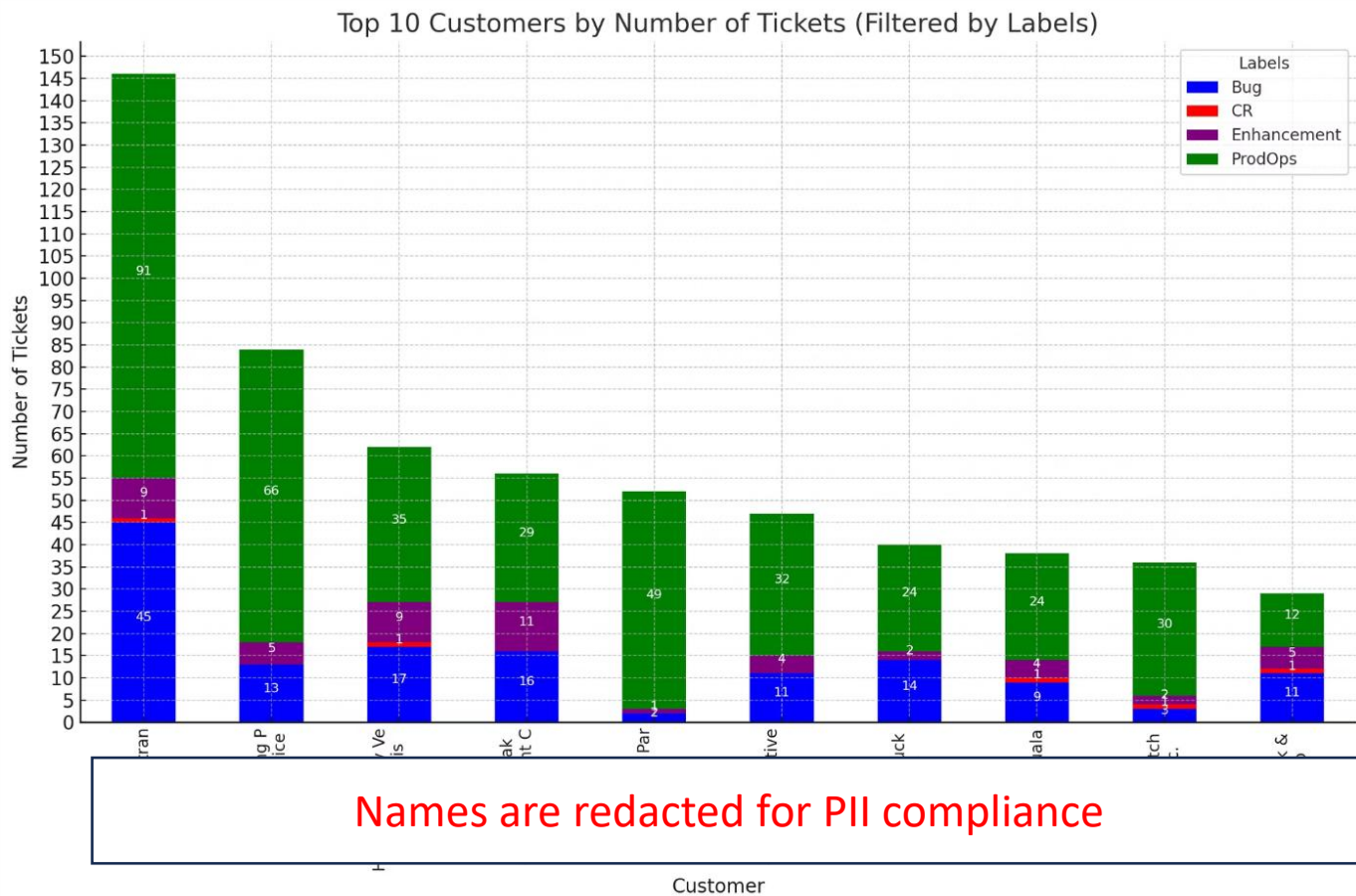
ProdOps: Weekly Trending of Age in last 12 months



Bug: Weekly Trending of Age in last 12 months

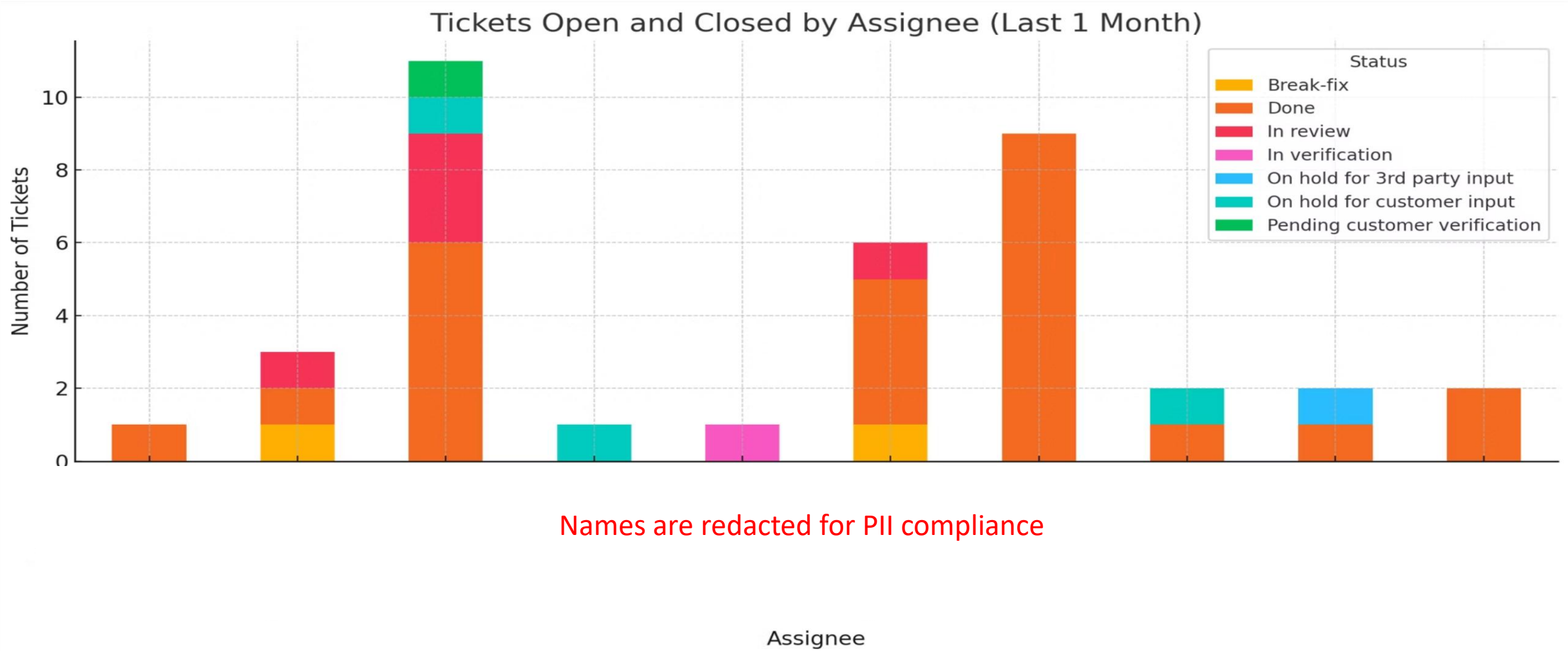


Ticket Type Distribution among Top 10 Customer Actions (Year 2024)

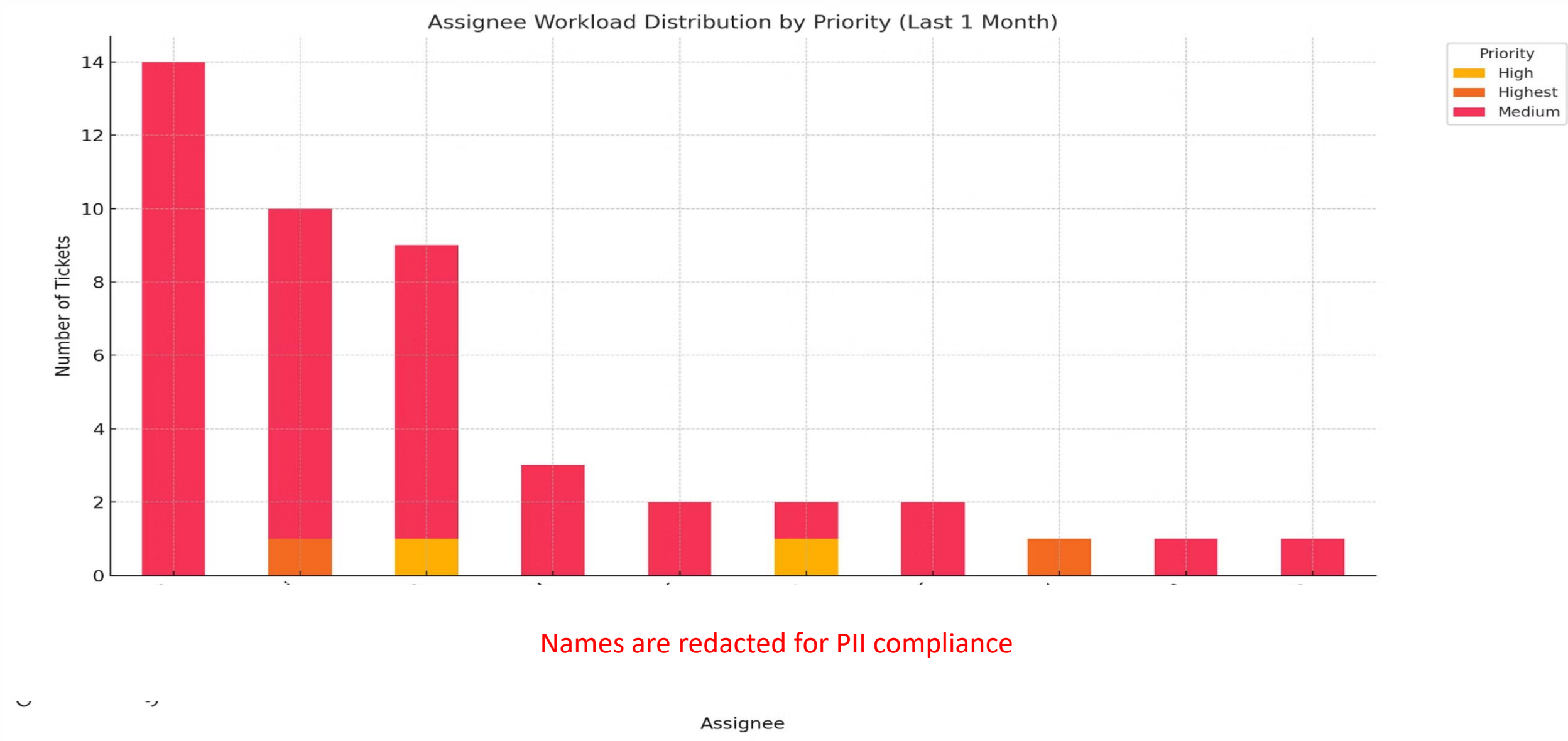


- Customer Focussed Service Improvement
- **ProdOps:** Indicate operational challenges requiring system stability or optimization.
- **Bug:** High counts in this category suggest a need to prioritize quality assurance and bug fixes, especially for the most engaged customers
- **Enhancement:** Enhancement 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.

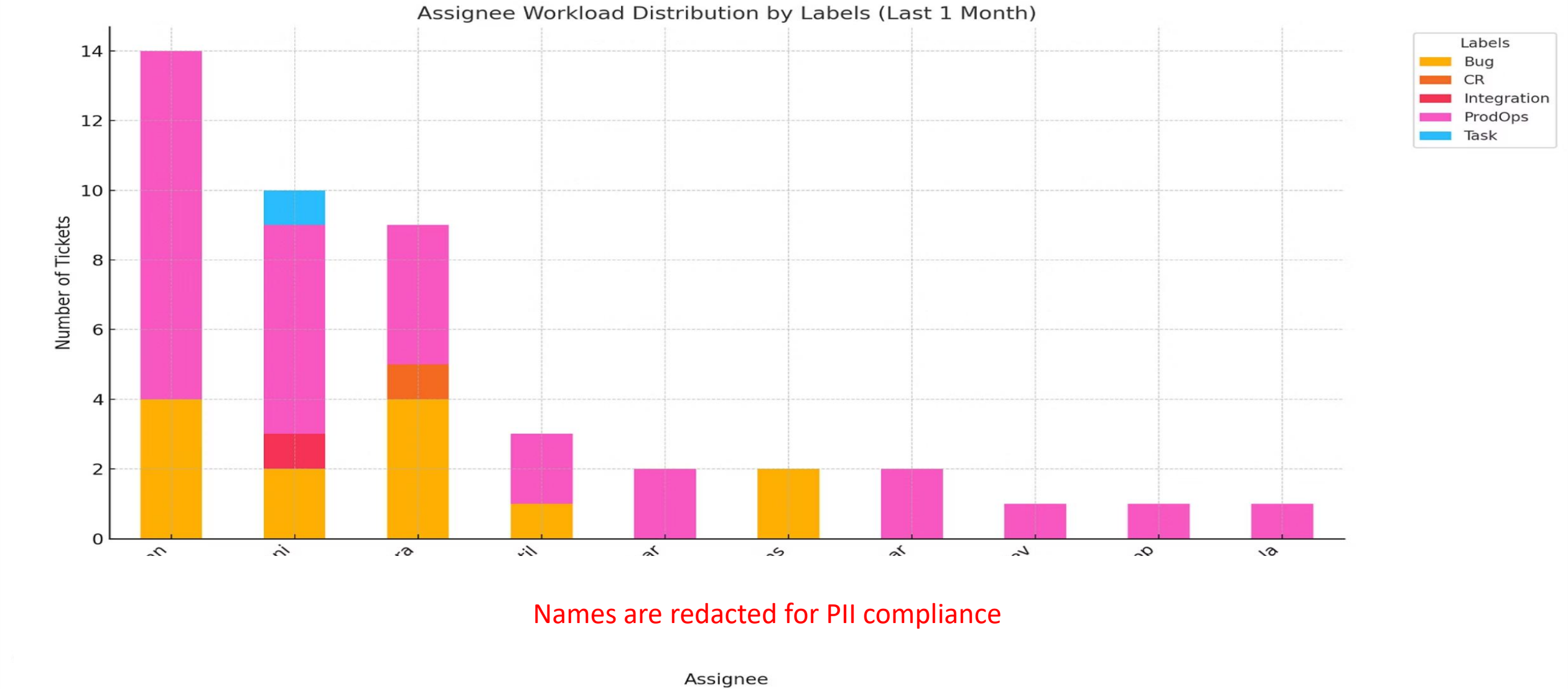
Tickets Status Distribution: Open vs. Closed by Assignee (Last 1 Month)



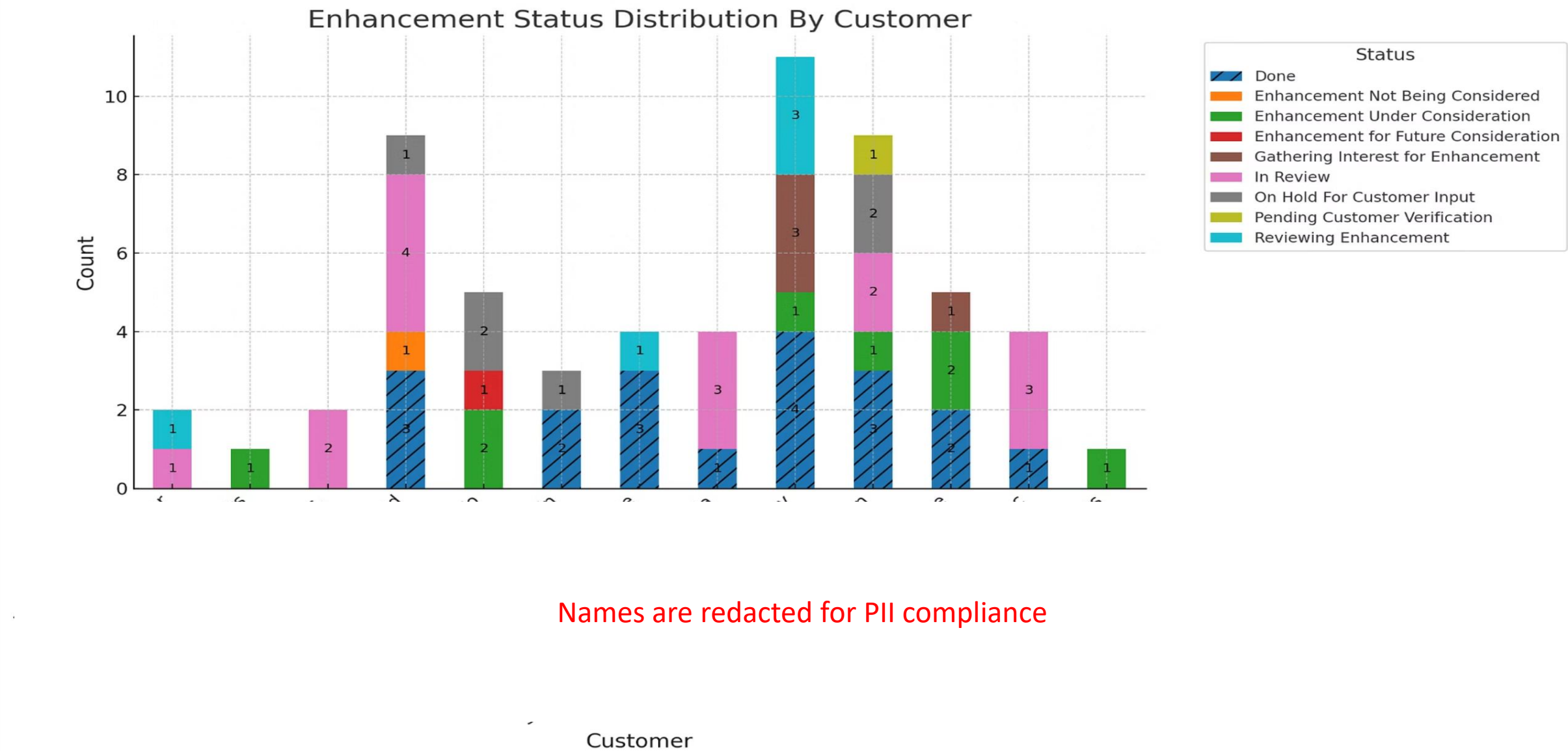
Assignee Workload Distribution by Priority in last month



Assignee Workload Distribution by Type



Enhancements by Customer by Status



Names are redacted for PII compliance