

Challenge

Local fleet management org was stuck in problem definition/analysis. Had multiple systems with different processes for serving retail and fleet customers. This forced customer service reps (CSRs) to enter duplicate data into multiple systems, making it hard for them to service their customers. Want enterprise-level VAMS (Management System).

Pain Points

- Duplicate work
- Slow, siloed systems
- Poor communication
- Lack of business buy-in

Solution

Core team of developers and UX designers practiced agile methodologies, conducting stakeholder interviews and analyzing user stories to focus on most impactful MVP slices.

UX Process

Conducted field research observations, developed personas, and utilized lean UX principles with deliverables like low-fidelity wireframes and prototypes.

Feedback

“This team is telling us **exactly how the rest of the world builds software and [we] need to follow them.**” (Executive Sponsor)

“The feedback they request is amazing. It’s good to know **we are helping design a tool that works for us.**” (Anonymous Stakeholder Survey)

Alex - CSM



Environment

Secluded office space, but frequently walks around to talk to techs & CSRs

Traits

- Confident, in-charge, and well respected
- Has a lot of technical knowledge and experience
- Client facing as needed
- Good understanding of everyone's role
- Primary Excede user

Frustrations

Hand-calculating taxes is a huge pain. Also difficult to get everyone on the same page and have transparency throughout the process

Goals

- Maintain healthy relationship with employees
- Oversee location business ops & manage staff well
- Reporting responsibilities to higher ups

Chris - CSR



Environment

Lots of distractions, desk job surrounded by ringing phones, people walking back & forth at the counter

Traits

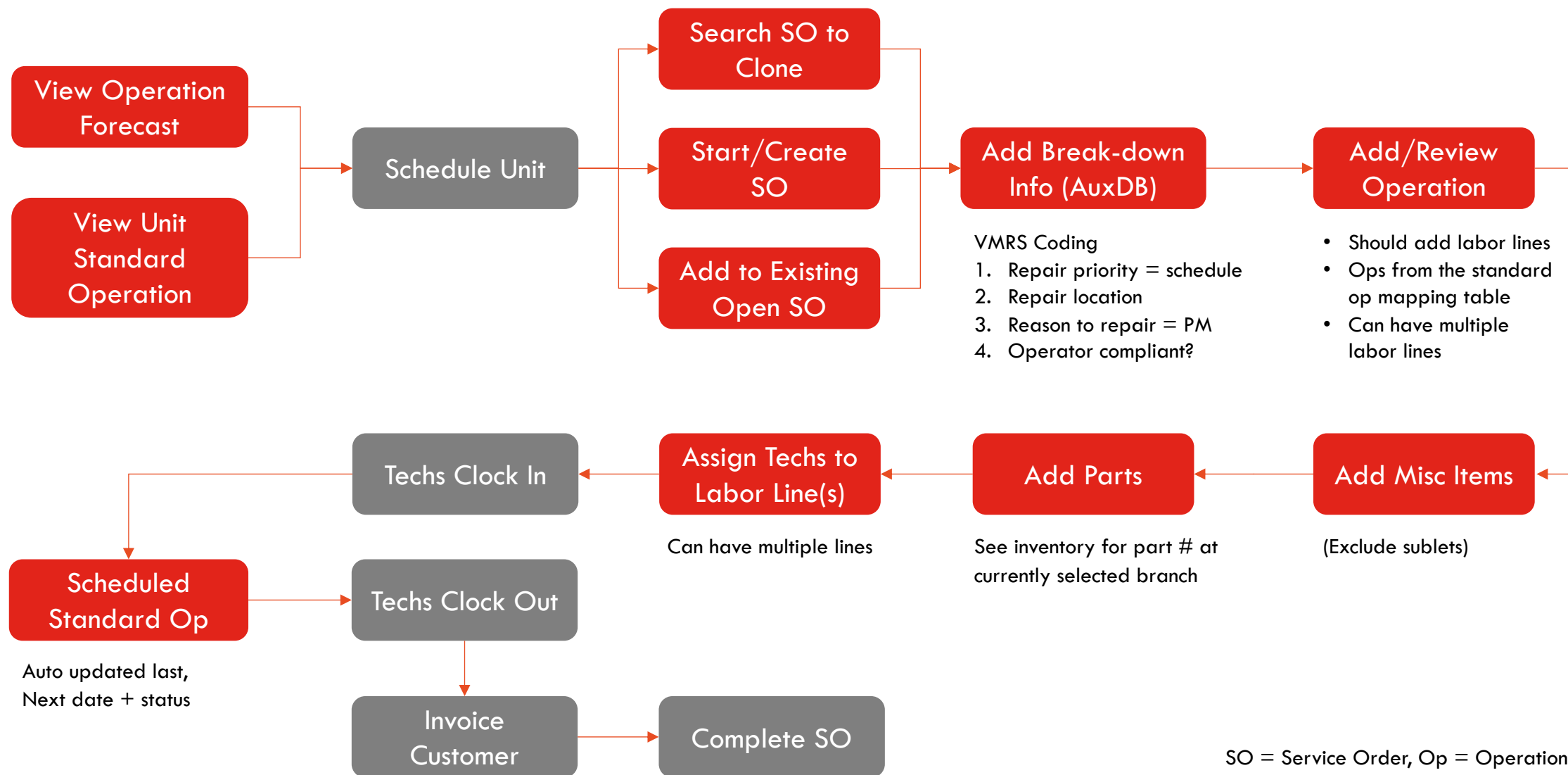
- Has mechanical experience/technical knowledge
- Is an efficient communicator
- Power user highly competent at his job
- Creative problem solver: find unique solutions to address their issues
- Well trained & hard working


Frustrations


Can't focus attention on serving customers (wasted time duplicating efforts & and calculation struggles)


Goals

- Capture information correctly
- Send info down the chain efficiently
- Close/open cases as needed
- Serve customer well



Dashboard

Units

Fleet Solutions

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Customer:


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FLEET UNIT ID	VIN/SERIAL	UNIT TYPE	LOCATION	CUSTOMER	OPERATION	CURRENT	LAST COMPLETED	NEXT DUE	OPERATION STATUS	ACTIONS
795	2MG3JMHA6BW065854	Automobile	CINCINNATI, OH	OPRYLAND HOTEL NASHVILLE, LLC	Heavy Duty PM A	371,431 Miles 0 Hours	08/21/2019 362,293 Miles	11/04/2019 366,293 Miles	Overdue	...
795	2MG3JMHA6BW065854	Automobile	CINCINNATI, OH	OPRYLAND HOTEL NASHVILLE, LLC	Heavy Duty PM B	371,431 Miles 0 Hours	07/22/2019 362,293 Miles	01/03/2020 370,293 Miles	Due	...
795	2MG3JMHA6BW065854	Automobile	CINCINNATI, OH	OPRYLAND HOTEL NASHVILLE, LLC	DOT	371,431 Miles 0 Hours	11/27/2018 328,025 Miles	08/29/2019	Due	...
51735	1FTBF2A62FED59173	Automobile	CINCINNATI, OH	CRESCENT CROWN - NEW ORLEANS	Heavy Duty PM B	7,112 Miles 0 Hours	07/01/2019 7,112 Miles	11/12/2019 15,112 Miles	Overdue	...
61233	YE2TC76B1U2029336	Battery	CINCINNATI, OH	TENNESSEE AVENUE BAPTIST CHURCH	Medium Duty PM A	521,597 Miles 0 Hours	12/18/2018 521,597 Miles	03/03/2019 525,597 Miles	Overdue	...
61233	YE2TC76B1U2029336	Battery	CINCINNATI, OH	TENNESSEE AVENUE BAPTIST CHURCH	Forklift PM	521,597 Miles 0 Hours	12/18/2018 521,597 Miles	04/02/2019	Overdue	...

Prototype Link:
<https://frf1m6.axshare.com>

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