



GoTo Automotive

An omnichannel communication app helping car dealerships provide a new best-in-class customer experience.

MY ROLE

Product Manager and lead researcher on the Inbox and Automotive products

TIMELINE

6 months to launch

TEAM

Product, Design and Engineering trios

OUTCOME

Revenue target met 3 months early

Context

GoTo is a remote-first B2B company providing business communication software to businesses across four continents: AMER, EMEA, LATAM and APAC. Their product suite spans omnichannel communication (softphone, contact center) and IT management (ticket system, remote support).

Products are built within a Trio Framework. UX researchers are deeply embedded across multiple trios simultaneously alongside Product, Design and Engineering. I held both roles on the Inbox and Automotive products, owning the product strategy for the automotive vertical while leading its research.

The challenge

GoTo set out to launch its first vertical product targeting car dealerships, a market with distinct workflows, compliance requirements and communication patterns unlike any existing GoTo customer.

No industry knowledge

Little understanding of how car dealerships operate, who the users are, and what they need from a communication tool.

Unvalidated product-market fit

Only a few signals that GoTo's existing product would meet the specific needs of automotive dealership workflows.

6 months to launch

A compressed timeline requiring fast, high-confidence research decisions to hit a non-negotiable ship date.

Product mission

Create the product strategy for GoTo's new automotive product, from roadmap definition through launch and into post-launch performance tracking.

1. **Define the roadmap** against validated dealership needs, not assumptions about them
2. **Prioritise and ship** with Design and Engineering against a fixed launch date
3. **Track performance in market** after launch and feed it back into the roadmap

Product strategy

The strategy came straight out of the research. We learned what dealerships actually needed, defined the experience worth building, then cut it down to what we could put

in market in six months without breaking the promise.

Agile

Customer centric

1. Define the target experience

WHERE WE WERE GOING

Set out what best-in-class omnichannel communication looks like for each dealership persona and use case. The north star the whole roadmap was measured against, grounded in the field research rather than in what the platform already did.

2. Scope the MVP

WHAT SHIPS IN SIX MONTHS

Cut the target experience down to a launchable first version, choosing the features that would move sales conversations and early adoption fastest. Deliberate trade-offs, made with the trio, on a fixed date that would not move.

3. Enhancement phase

CLOSING THE GAP

Build on the MVP foundations release by release, each one moving the product closer to the target experience and unlocking the use cases the MVP had to leave out.

4. Keep learning, keep pivoting

NEVER A FINISHED PLAN

Both the target experience and the work in flight stayed open to customer feedback. Assumptions were tested as we went and the roadmap moved when the evidence did, so the product kept ahead of the market instead of chasing it.

Research strategy

The evidence base the product strategy stood on: a systematic approach to building dealership knowledge from scratch.

1. **Field study:** organised and conducted on-site visits in car dealerships to identify key personas and workflows
2. **Recruitment pipeline:** built an automotive user panel for future research rounds
3. **User journey mapping:** mapped current-state and vision journeys across personas
4. **Persona + JTBD:** identified targeted personas with jobs to be done
5. **Continuous research:** implemented an ongoing research stream with users
6. **Concept & design tests:** tested new concepts and designs leveraging the recruitment pipeline

Key personas

Five personas identified who would benefit the most from GoTo. Enhancing their current experience was critical for adoption and sales.

Business Development Manager / IT Admin

Sales Manager

Sales Representatives

Service Managers

Service Representatives



IT Admin/BDC Manager

Mindset

My main goal is to create an environment where all processes are as efficient as I can. I want my software to talk to each other otherwise I am losing too much time pulling data from multiple software, this makes my team's job harder too. In this world, I want everyone to live in the CRM, and I'd happily remove all middleware if GoTo has better integration and analytics.

I am the one responsible for creating IT processes that will be used by the company, but I don't have the time to explore all the capabilities of each software that we use.

GOALS

- Monitor & optimize IT operations for multiple dealerships
- Manage users, devices, configurations for all employees for multiple dealerships
- Set up IT for new roadships
- Manage HOC rpgs

Needs

- Easily track any phone software messages activity per agent & per portfolio
- Easily add, remove, edit users in admin portal
- Analytics to be accurate
- Consolidate all the analytics in one place (CRM would be the best)
- Easily share reports with other stakeholders
- Easily set up, test, and configure software

Tasks

- Build, update & send reports
- Assist BDC rpgs
- Listen to call recordings
- Track HOC app performance
- Troubleshoot IT issues
- Set up IT for new roadships

Challenges

- New admin portal experience is more difficult (too many clicks to display names, users, portfolios, numbers)
- Can't track messages activity with GoTo
- Some req calls done through GoTo but tracked in CRM
- GoTo text messages not tracked in CRM
- Missed calls activity not accurate for ring group and multiple devices used by a same user
- Shared CRM conversations switched from public to private (not playing the whole principle)
- Did not know could find call activity in analytics
- Can't filter reports by name on the line in GoTo
- Can't group HOC under one variable comparison in GoTo
- Collect data from multiple software to create reports

Software

- CRM: DealerSocket, Vinolution, Momentum
- Communications:
 - Email: Email, DealerSocket, Outlook
 - Text messages: GoTo, DealerSocket
 - Internal chat: Slack, GoTo text messages, Google chat
 - Phone: GoTo (mobile app or desktopphone)
 - Webchat: Gubago
- Inventory: CRM, iStock, wasteo, Reynolds and Reynolds
- Call analytics: Car Wars, GoTo
- Middleware: Purpleix
- Appointment: DealerX



Business Development Center rep (Sales/Service and parts)

Mindset

I have to meet difficult targets everyday, sometimes I have as many as 50 outbound and 50 inbound calls a day. On top of this I have to drive sales by setting up at least 2 new appointments per day with new leads.

I am constantly multitasking by verifying client's info in one software, updating appointment in another, reviewing history of services in third software, my screen space is as precious as my time. The additional challenge is that I have to do this for two dealerships.

I don't have time to improve our processes, and it is not my responsibility, I am ok with any process my manager trained me to use.

GOALS

- Provide new leads to sales rep
- Provide customer support service
- Meet target call volume (inbound calls, 420/month outbound vs. 50/day inbound calls)
- Set up appointments (2/day)

Needs

- To easily identify a customer when calling
- To easily find & update customer's info in CRM
- To easily find customer's full history of conversation
- To easily set appointment
- To easily transfer calls
- To easily track progress on target
- To easily know when logged in or out of queue

Tasks

- Here to switch between 2 accounts (LeVelle vs. Toyota)
- Call leads & existing customers
- Handle customer's inquiries for sales or/and parts & services
- Send text messages to leads & existing customers
- Send emails to leads & existing customers
- Send reminders
- Answer Webchat
- Handle missing payments
- Update CRM information
- Transfer call to the appropriate department

Challenges

- Having multiple internal employees talking to the same customers in the same CRM message thread
- Can't organize contact per dealership in CRM
- No visual indicators on desk phone when logged out of queue (have to log out and back in)
- Switching between two accounts in CRM and GoTo is difficult
- Callers AI is not accurate when counting number of time appointment was proposed
- No automated appointment reminders
- Going back and forth with sales rep when sending pictures/videos to customers

Software

- CRM: DealerSocket, Vinolution, Momentum
- Communications:
 - Email: Email, DealerSocket, Outlook
 - Text messages: GoTo, DealerSocket
 - Internal chat: Slack, GoTo text messages, Google chat
 - Phone: GoTo (desktopphone)
 - Webchat: Gubago
- Inventory: CRM, iStock, Reynolds and Reynolds
- Call analytics: Car Wars
- Appointment: DealerX



Sales Representative

Mindset

My primary goal is to sell as many cars and lease renewals as possible. In addition to this I also need to meet my daily target of 25 outbound calls, and welcome walk-in customers and those with appointments.

I am always in the showroom, and need to have access to my phone 24/7 for phone calls and text messages. I prefer using my GoTo phone to customers so I have a more personal conversation with them.

I am not a tech person and it is not the focus of my job. I want to find the info I need quickly and share it using my client's preferred method of communication.

GOALS

- Sell to new customers/leads
- Lead to existing customers
- Retention calls
- Demonstrate sales skills
- Meet target outbound calls (20/day)
- Meet target appointment set up (2/day)

Needs

- CRM info to be up to date
- To send personalized to clients/leads
- Quick access to progress on target
- Quick access to customer's full history of conversation
- Quick & accurate customer's full information
- Quick & accurate phone

Tasks

- Call leads & existing customers
- Send text messages to leads & existing customers
- Send emails to leads & existing customers
- Send email campaigns
- Send fax
- Handle missing payments
- Update CRM information

Challenges

- Have a CRM and GoTo testing numbers
- CRM information not up to date
- 7 emails per day is copied - have to send letters
- Having multiple internal employees talking to the same customers in the same CRM message thread
- Can't make pictures with GoTo
- Many pictures
- Can't send video with GoTo
- GoTo missed call is not showing as a GoTo call on mobile, so don't know who is calling

Software

- CRM: DealerSocket, Vinolution, Momentum
- Communications:
 - Email: Email, DealerSocket, Outlook
 - Text messages: GoTo, DealerSocket
 - Internal chat: Slack, GoTo text messages, Google chat
 - Phone: GoTo (mobile app or desktopphone, now live on rep rpg)
- Inventory: CRM, iStock, Reynolds and Reynolds
- Call analytics: Car Wars
- Appointment: DealerX



Service Advisor

Mindset

My function does not involve lot of communication. I still need to have access to a desk phone but I don't like answering it. I don't want to be in a rush.

GOALS

- Coordinate parts & services
- Car repair & inspection
- Welcome customers

Needs

- To send prices, technician's recommendations, video's pictures to customers
- To identify customers
- To provide ETA on service to customers
- To provide service confirmation from customers to technicians

Challenges

- Moving back and forth between desk and garage
- Always running
- Inbound calls are disrupting activities
- Remembering who to call back

Tasks

- Write key parts
- Welcome customers
- Assign cars to right technicians
- Bring the immediate needs between technicians, parts, and customers
- Text, or calls customers

Software

- Communications:
 - Internal Chat: Slack
 - Phone: GoTo (2 desktopphones)
- CRM: CRM, Reynolds and Reynolds, website
- Service Lane: MyAuto, iStock

Persona artefacts produced from the dealership field study.

Journey map

The journey map was the artefact that got the whole trio arguing about the same thing. It showed how a single customer enquiry actually travels through a dealership, across channels and across roles, and that made both the gaps and the opportunities impossible to ignore. Four things came out of it:

1. A shared picture of how information has to flow

The team could finally see how an enquiry moves between channels and hands off between personas, rather than each of us holding a different mental model of it.

2. The gaps in our current product

Every point where the existing platform dropped context, forced a workaround or simply stopped short became visible on the map.

PROBLEM

Creating one journey map per persona did not reflect the end-to-end workflows GoTo was supporting.

3. Where the future opportunities were

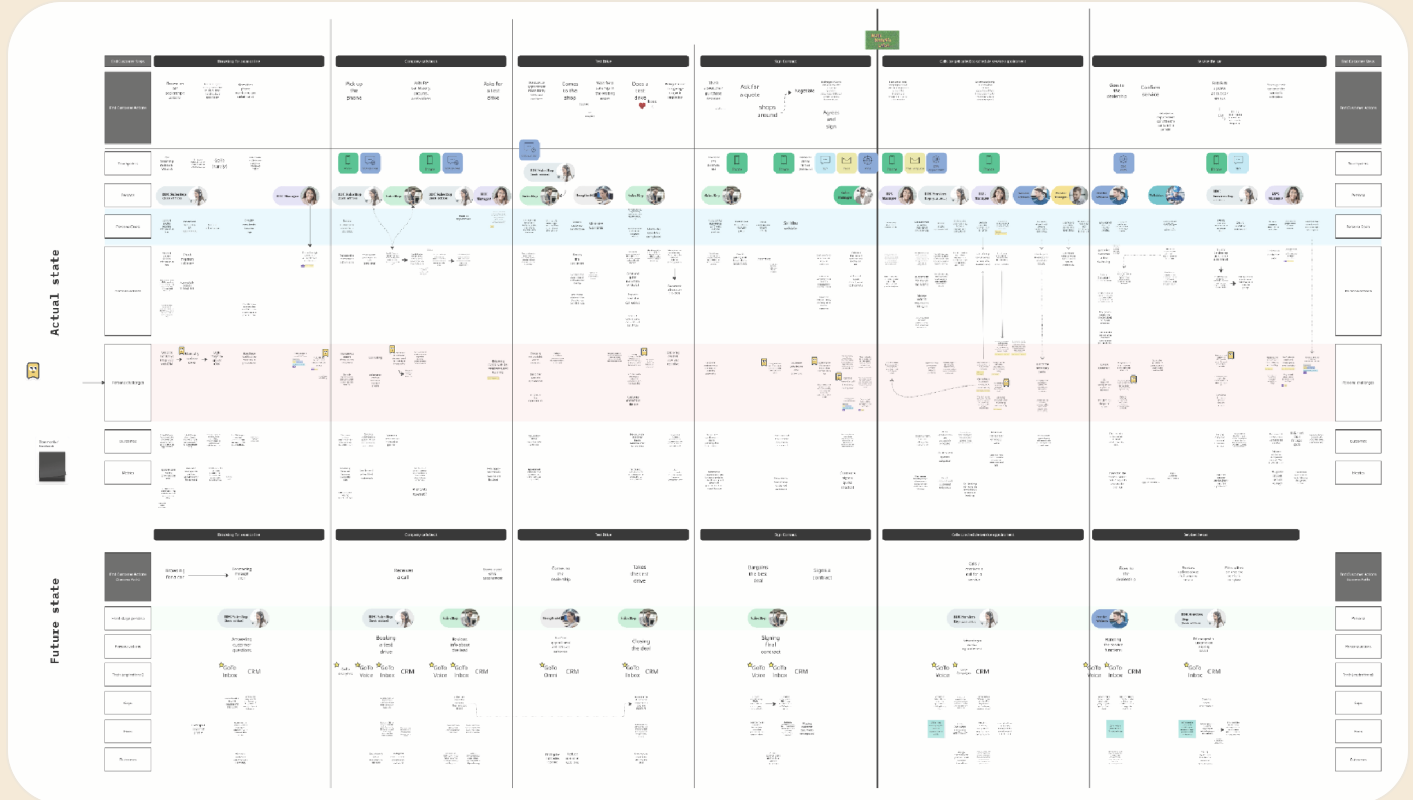
New functionality and AI-assisted steps could be placed against real moments in the journey instead of being argued for in the abstract.

4. The outcomes and metrics to benchmark against

We defined what good looked like at each stage, which gave us the success measures the roadmap and the post-launch dashboard were later held to.

SOLUTION

In a workshop with UX designers and PMs, we mapped the dealership's end customers to track how information moved from one role to another within a single journey map.



The end-to-end map of how information flows.

Key initiatives

These initiatives were prioritised based on our research and the target experience we defined. Together, they form the MVP scope, addressing the highest-impact gaps and establishing the foundation for the product's next phase.

1.

Data retention

Increased to 7 years to match dealership legal requirements.

2.

Report templates

Managers don't want to build dashboards; they want to use them to improve their team's performance.

3.

DMS & CRM integrations

Dealership employees live in their CRM/DMS; integration is critical to unlock powerful automations.

4.

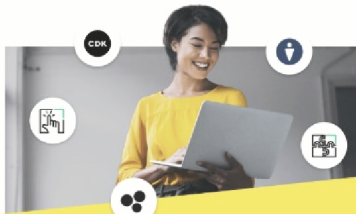
Image & video quality

Sales representatives rely on sending high-quality videos and images to close deals.



Purpose-built

GoTo Connect for Automotive is a solution that solves your dealership's unique challenges.



Robust CRM integration capabilities

Easily leverage customer data to deliver personalized interactions at every customer touchpoint.



Omnichannel across all devices

Engage across multiple communication channels to provide exceptional customer experiences.

GoTo Automotive featured on GoTo's official website at launch.

Testing & iteration

Multiple rounds of concept and usability testing per initiative.

1. Usability testing

Identify friction in hi-fi designs per initiative.

2. Iterate

Refine with designers based on findings.

3. Re-test

Confirm improvements before handoff.

Performance tracking

Launch was the start of the measurement, not the end of it. I built a performance dashboard in Mixpanel so the trio could see how the product was actually being adopted, week over week, against the behaviour the research said to expect.

WHAT IT TRACKED

Daily active users

Monthly active users

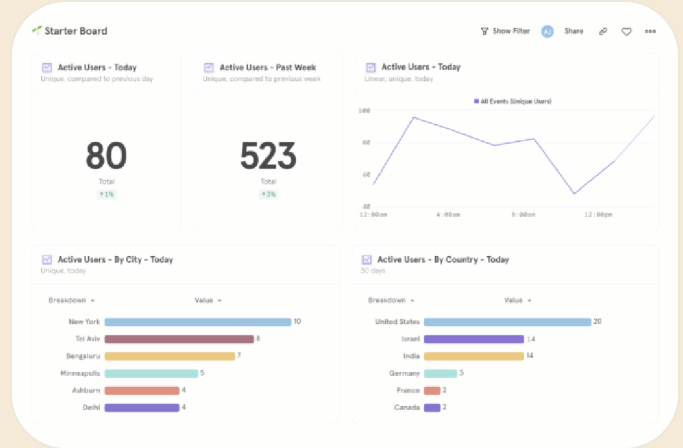
Activation

Onboarding flows

WHAT IT CAUGHT

A key activation blocker in the automation flow.

Users were dropping out of onboarding at the same step. The dashboard made the drop-off visible, we scoped the fix, and activation recovered.



The Mixpanel dashboard built to monitor adoption and onboarding.

Image from the Mixpanel website, shown for illustration. The dashboard actually built for this project is GoTo's internal property and can't be shown here.

BUSINESS OUTCOME

Target revenue met three months ahead of schedule.

A 50% win rate on sales deals, on a product built entirely against validated dealership insights.

50%

win rate on automotive sales deals

3 mo

ahead of the revenue target

6 mo

from zero industry knowledge to launch

My deliverables

A shipped product, plus the artefacts that created lasting value beyond the launch.

1. A launched product, shown at NADA

GoTo Automotive shipped and went to market, presented on the floor of the NADA Show in Las Vegas, the largest car dealership convention in the world.

2. Personas

Detailed profiles for key dealership roles with goals, workflows and GoTo usage patterns.

3. User journey maps + JTBD

Current-state journey maps with jobs-to-be-done for each persona.

4. Customer pipeline

A panel of 80 automotive customers available for continuous research and interviews.

5. Marketing case studies

Customers providing real-world success stories for go-to-market and sales enablement.

6. Knowledge base

A car dealership research repository accessible across the company.
