

ClimateSage: Detailed Customer Journeys

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Introduction

This document outlines two end-to-end customer journeys to demonstrate the functionality and user experience of the ClimateSage platform.

- **Journey 1 (The Simple Path):** Follows a small business owner with straightforward needs.
- **Journey 2 (The Complex Path):** Follows a multi-user team at a large hotel with complex, overlapping compliance requirements.

Journey 1: The Simple Path

- **Persona:** Omar, the founder of "SafeTech Consultants," a 20-person IT consultancy in Abu Dhabi with one office.
- **Goal:** Quickly generate a foundational ESG report to satisfy a new enterprise client's supplier requirements.

Stage	User Action (What Omar does)	Application Response (What Omar sees)	Database & Technical Backend (How it works)
1. Request a Demo.	Omar visits climatesage.ae, reads the features, and clicks	A clean "Thank You" page appears,	No permanent data is stored yet.
First Contact	He enters his name, company name ("SafeTech Consultants"), and email.	He receives a secure, single-use invitation link and has been sent	The system generates a secure, single-use token and emails it to Omar.

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to his email.
This token is temporarily stored in the invitations table with a 'pending' status and an expires_at timestamp.

2. Onboarding

Omar clicks the unique link in his email. He is taken to a registration page where he sets a password. He is then routed directly into a simple, two-step

The UI is clean and welcoming, with clear instructions. It celebrates the completion of the setup and

organizations:
A new row is created for "SafeTech Consultants".

user_profile: A row is created linking Omar's user_id to the organization_id, assigning him the role of 'org_admin'. The

user_permissions: A row is created linking Omar's user_id to the organization_id, giving him company-wide access.

sites: A single row is created for his Addressable office

organization_frameworks: A row is added automatically linking SafeTech's organization_id to the 'Core ESG' framework_id.

Stage	User Action (What Omar does)	Application Response (What Omar sees)	Database & Technical Backend (How it works)
	onboarding wizard. He enters his company's sector ("Professional Services") and industry_ description: ("Cybersecurity and IT Audits"). He confirms he has only one location.	guides him toward the 'Data Wizard' with a call-to-action button: "Start Your ESG Profile."	ce. •
3. First Data Entry	Omar enters "Data Wizard." The platform, knowing he is an office-based service firm, presents a short, relevant question	The wizard shows a progress bar. Each question is in plain English (e.g., "How many	metric_id (e.g., 'electricity_consumption_kwh'), the value_numeric, period_start and period_end dates, and Omar's user_id as the entered_by_user_id. • evidence_file_s: When he uploads the bill, a row is created with a secure storage_path and file_has audit_log: Every record creation is logged, noting the user_id, action ('CREATE'), table_name (data_rec

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	aire. He answers questions about his office's electricity use, water consumption, employee count, and waste disposal. For his electricity usage, he uploads a PDF of his utility bill when prompted.	full-time employees do you have? "). The "Upload Bill" button appears directly within the electricity city question, making the process intuitive.	h. This row is linked via records), and the record _id of the new entry.
4. Exploring the Dashboard	After completing the wizard, Omar clicks on the "Dashboard" tab.	The dashboard immediately displays the visualizations for	The dashboard UI queries the data_records table for

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	He sees the "Owner / C-Suite" lens by default.	data he just entered. He sees the KPI cards for "Energy Usage" and "Head count." The "Energy Usage" card shows a comparison to the previous month and a small trendline. The dashboard feels alive,	Omar's organization_id. It pulls the latest data and the energy data from the previous period to calculate the trend comparison. The components are rendered based on the default "Owner" lens configuration.

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		not static.	
		A modal reporti	The engine queries all data_re cords and eviden ce_files associa ted with SafeTec h's organiz ation_i d for the selecte d quarter. It aggrega tes the profes sional populat es a pre- designe d PDF templat e, and delivers the
5. Gene rating a Repo rt	To satisfy his client, Omar navigates to the "Reports" section and clicks "Generate ESG Report." He selects the last quarter as the reporting period.	rs appea ng allowi ng him to confir m the report ing period and add a custo m title. He clicks "Gene rate," and after a few mome nts, a profes sional , well- forma tted PDF report is ready for	

Stage (What Omar does)	User Action	Application Response (What Omar sees)	Database & Technical Backend (How it works)
		download.	final file.

Export to Sheets

Journey 2: The Complex Path

- **Personas:** The team at "The Desert Palm Oasis Hotel" in Dubai.
 - **Fatima:** The General Manager (an org_admin).
 - **David:** The Head of Engineering (a site_admin).
 - **Ali:** A Restaurant Manager (a contributor).
- **Goal:** To collaboratively manage ongoing compliance for ESG, the mandatory Dubai Sustainable Tourism (DST), and the voluntary Green Key certification.

Stage	User Action	Application Response	Database & Technical Backend (How it works)
1. Onboarding & Setup	<p>Fatima, the GM, completes the same onboarding flow as Omar. She selects "Hospitality" as her sector and adds her main hotel site in "Dubai."</p>	<p>The application immediately recognizes the combination of her industry and location. A message appears: <i>"As a hotel in Dubai, we've automatically enabled the</i></p>	<p>• organizations, profiles, user_permissions, and sites tables are populated as before.
• The system logic triggers the creation of two rows in the organization_frameworks table: one linking the hotel to 'Core ESG' and another linking it to 'DST'.</p>

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		<p><i>mandatory Dubai Sustainable Tourism (DST) framework for you."</i></p>	
2. Structuring the Organization	<p>Fatima navigates to Settings > Sites. She adds "Conference Center" and "Seafood Restaurant" as new sites, selecting the main hotel as their "Parent Site." Then, in Settings > Frameworks, she finds "Green Key" and clicks the toggle to activate it, as the hotel is pursuing certification.</p>	<p>The UI allows her to create the nested site structure. In the Frameworks section, the toggle for Green Key turns blue, and a success message confirms that "Green Key questions and reports are now active."</p>	<p>parent_site_id is filled with the id of the main hotel site, creating the sub-location hierarchy.</p> <ul style="list-style-type: none"> • Activating Green Key creates a <p>third row in organization_frameworks, linking the hotel to the 'Green Key' framework_id.</p>
3. Delegating Tasks	<p>Fatima invites her team. She invites</p>	<p>David and Ali receive email invitations</p>	<p>invitations table, each with the correct role profiles and user_permissions. David's user_permissions row</p>

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4. Collaborative Data Entry	David as an 'admin' for the "Main Hotel" and "Conference Center" sites. She invites Ali as a 'contributor' for the "Seafood Restaurant" site only.	with a secure token. When they sign up, their permission s are already set. David can see and edit data for his two sites, while Ali can only add data for the restaurant.	and site_id will have the site_id specified. for the Main Hotel, • When David and Ali accept, new entries are made in site_id for the restaurant.
	David logs in and enters the Data Wizard. The wizard asks him to specify which of his sites he is entering data for. He selects "Main Hotel" and enters the monthly electricity and water data. He sees questions about guest nights and linen reuse,	The wizard interface is tailored. The site-selection dropdown only shows the sites David manages. The question list is long, as it combines questions tagged for 'ESG', 'DST', and 'Green Key'.	The system queries question_tags to find all questions where the tag_value is 'Hospitality', 'ESG', 'DST', or 'Green Key'. This creates a single, unified but comprehensive questionnaire. When David enters the water usage, a single row is created in data_records, but the system knows this one answer fulfills requirements for all three frameworks.

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	which are specific to hotels.		
	Fatima logs in to review performance. She uses the "Stakeholder Lens" selector on her dashboard.	The dashboard dynamically rearranges its widgets and KPIs without reloading the page. Each lens presents the same underlying data in a completely different context, answering the key questions for that persona.	
5. Multi-Lens Dashboard Review	• As 'Owner/C-Suite': She sees a high-level scorecard with a composite ESG score and a risk heat-map.		This is a front-end operation. The application has a configuration for each lens that specifies which metric_ids to display and which widgets to use. All lenses query the same data_records table; the application logic just changes the SELECT query and the presentation components based on the chosen lens.
	• As 'Regulator': She switches the lens and sees a DST compliance checklist, confirming David's data fulfills the May submission.		
	• As 'Investor': She switches		

Stage	User Action	Application Response	Database & Technical Backend (How it works)
6. Targeted Reporting	again and sees the hotel's performance benchmarked against an industry average for water usage.		
	The DST deadline is approaching. Fatima goes to "Reports." She now has multiple options. She clicks DST Report, selects "May 2025," and generates it. Next, for a board meeting, she generates the Quarterly ESG Report.	The system generates two distinct documents. The DST report is a concise, data-heavy submission formatted for the regulator. The ESG report is a more narrative-driven PDF with charts and summaries for the E, S, and G pillars.	The reporting engine again queries the single source of truth (data_records). For the DST report, it filters for questions tagged with 'DST' for the month of May. For the ESG report, it filters for questions tagged 'ESG' for Q2 2025 and uses a different PDF template. The "collect once, use many" principle is fully realized.