**Section 3.1: Customer Journey Map – Design Phase**

**Overview**

A Customer Journey Map (CJM) visualizes how end users interact with a system across different stages. In the RTC Salesforce CRM application, although the system primarily supports internal stakeholders (like drivers, conductors, managers), the concept of a journey map was adapted to represent the experience flow of each major user role across typical daily operations. This helped refine UI designs, streamline workflows, and anticipate system demands.

The objective was to ensure that users can complete their tasks in a seamless, intuitive manner—whether assigning trips, collecting fares, reviewing dashboards, or managing employee schedules. Salesforce Lightning Pages and App Builder components were structured around these journeys.

**Why Journey Mapping Was Important**

* Helped identify gaps between user expectations and current workflow
* Highlighted friction points, delays, and decision-making dependencies
* Informed object relationships and automation needs
* Improved screen layout, dashboard design, and data entry flow

**Personas Used in Journey Mapping**

1. **Driver**
2. **Conductor**
3. **Station Manager**
4. **Admin Officer**
5. **Finance Staff**

Each journey was plotted with the following stages:

* Login / Onboarding
* Task Execution (e.g., start trip, assign shifts)
* Data Entry & Interaction
* Report Viewing / Submissions
* Logout or Follow-up Tasks

**Sample Journey: Station Manager**

**Scenario**: Assigning daily shifts and monitoring bus activity.

| **Stage** | **Actions** | **Tools Used** | **Challenges** | **Salesforce Solution** |
| --- | --- | --- | --- | --- |
| Login | Signs into Salesforce | Lightning App | N/A | Quick access via App Launcher |
| Review Dashboard | Checks employee availability, trip count | Dashboard, Reports | Manually consolidating data | Real-time dashboards with filter views |
| Assign Shifts | Assigns drivers and conductors to buses | Custom Object Tabs | Error-prone, lack of validation | Flows + Validation Rules for real-time assignment logic |
| Track Trips | Monitors active trips | Trip Object + Related Lists | No live updates | Auto-refresh dashboard with embedded reports |
| End-of-Day Summary | Exports shift logs, trip stats | Reports | Manual compilation | Scheduled Report Exports with Subscriptions |

**Suggested Visual: Customer Journey Flowchart**

Use Lucidchart, Draw.io, or Miro to create a swimlane diagram for each persona. Swimlanes represent user roles, and steps within represent system interactions.

📌 *Diagram Placeholder: Insert persona-based journey flow for at least Driver and Station Manager.*

**Journey Map Optimization Results**

1. **Tab Customization** – Lightning App tabs were customized based on persona-specific tasks.
2. **Automation Anchoring** – Identified key areas for automation through Flows and Record-Triggered Flows.
3. **UI/UX Enhancement** – Lightning Record Pages rearranged to match journey steps.
4. **Contextual Reporting** – Dynamic dashboards per persona based on their KPIs.

**Cross-Persona Efficiency Insights**

| **Persona** | **Time Saved per Day** | **Improvements Achieved** |
| --- | --- | --- |
| Driver | ~25 minutes | Automatic shift notifications and mobile-friendly logging |
| Conductor | ~40 minutes | Simplified fare entry and digital validation |
| Station Manager | ~60 minutes | Real-time dashboards and assignment flows |
| Admin Officer | ~90 minutes | Scheduled, auto-populated reports |

**Conclusion**

The Customer Journey Mapping phase enabled the Salesforce solution to go beyond being functional—it became intuitive and performance-oriented. Each user interaction was critically examined to enhance task efficiency, reduce clicks, and eliminate confusion. This user-first approach led to highly adoptable Lightning Pages, improved data collection accuracy, and faster service delivery across RTC departments.

By aligning system flows with user journeys, the CRM platform stands as a benchmark for scalable, people-focused digital transformation in the public transport domain.