



Customer Journey Map

Customer Persona: RTC Transport Department Admin / Manager

Product: Salesforce CRM Public Transport Management

Goal: Efficiently manage buses, employees, trips, and fare data while gaining insights through reports and dashboards.



Overview Table Format

Stage	Touchpoints	Customer Actions	Experience	Pain Points	Opportunities for Improvement
Awareness	Trailhead, Internal IT Team, Salesforce onboarding	Gets introduced to Salesforce CRM	Curious but unsure	Overwhelmed with new platform	Provide in-app guided setup/tutorial videos
Consideration	Setup Wizard, App Manager, Object Manager	Explores available features and navigates setup	Gaining confidence	Confused by object-relationship mapping	Offer quick-start checklist for transport use
Onboarding	Lightning App Builder, Tabs, Page Layouts	Creates tabs, custom objects (Trip, Bus, Employee)	Productive	Time-consuming to configure every tab	Provide template apps and layouts for bus CRM
Usage	Flows, Validation Rules, Reports, Dashboards	Automates fare fetch, manages trips and bus stations	Empowered, efficient	Flow errors or misconfigured fields	Provide debug guide and test datasets
Monitoring	Reports, Dashboards	Views trip frequency, passenger count, route usage	Data-driven, insightful	Needs custom metrics	Allow dynamic dashboard filters and KPIs
Maintenance	Developer Console, Object Manager	Updates validation logic, manages employees	Confident admin	Complex for non-tech staff	Build a simplified admin panel UI
Support	Trailblazer Community, Salesforce Help, Internal IT	Seeks help during flow errors or trigger bugs	Supported but sometimes delayed	Not immediate answers	Add FAQ panel or AI chatbot to app
Feedback	Feedback form, Reporting issues to IT/Salesforce support	Shares issues like currency mismatch, lookup issues	Involved, invested	Hard to track resolved issues	Maintain internal feedback log dashboard



Admin Persona Snapshot

- **Role:** Admin / Manager of Transport Operations
- **Needs:** Automation, accuracy, real-time reports
- **Tech Skills:** Medium (can use setup, flows, triggers with guidance)
- **Pain Point:** Needs to ensure drivers/conductors are correctly assigned, avoid manual fare entries



Suggested Salesforce Features Used in Each Stage:

Stage	Key Salesforce Features
Awareness	Trailhead, Onboarding emails
Onboarding	Object Manager, App Manager, Tab creation
Usage	Flows, Validation Rules, Lookup Fields, Reports
Monitoring	Dashboards, Scheduled Reports
Maintenance	Apex Triggers, Page Layout Editor
Support	Salesforce Help, Developer Console