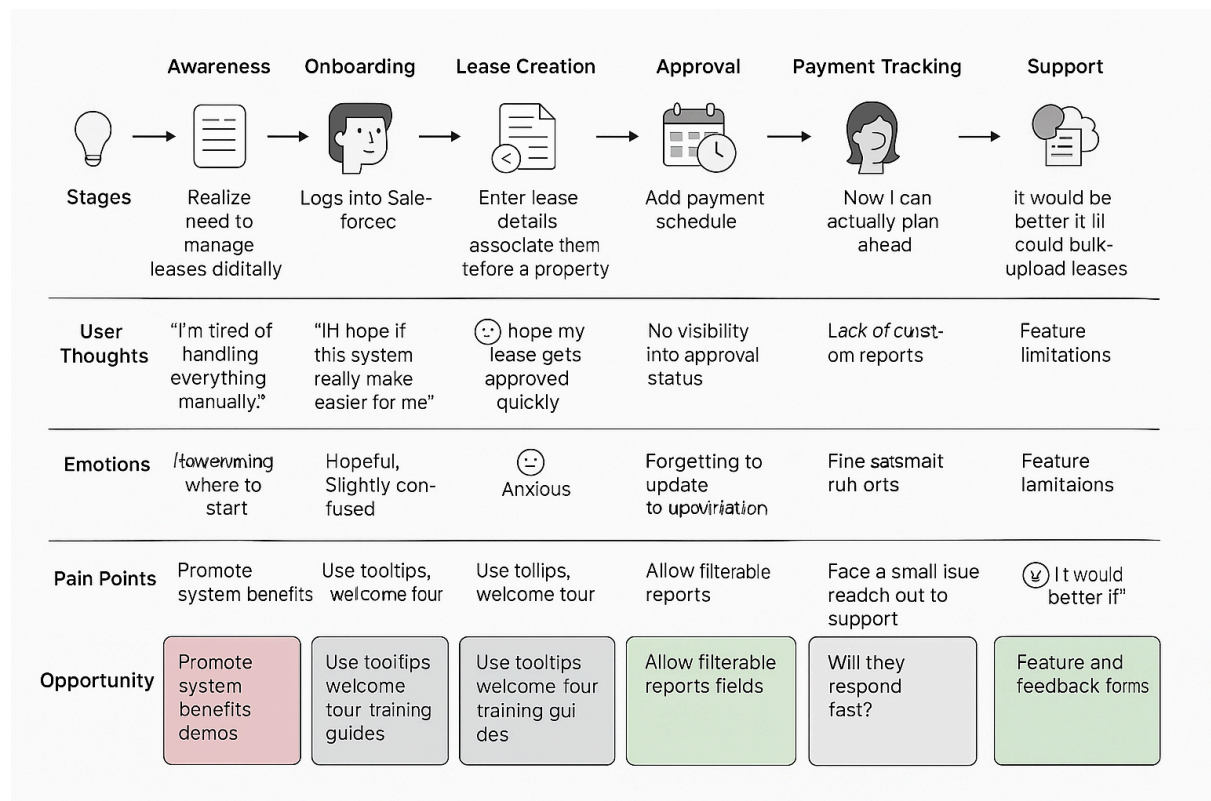


CUSTOMER JOURNEY MAP – Lease Management

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- The customer journey shows how the lease management tool can relieve pain points, increase confidence, and enhance productivity.
- Each stage shows opportunities to improve the user experience using Salesforce features like flows, validation rules, dashboards, and automation.



The customer journey for a property manager using the Lease Management System can be broken into eight key stages, each representing their experience, emotions, and challenges during the process.

1. Awareness

The property manager realizes the need for a digital solution due to the heavy burden of paperwork and scattered lease information. They feel frustrated and overwhelmed, thinking, "Manual work is taking too much time." This stage is where they start seeking better alternatives.

2. Onboarding

After being introduced to the Salesforce-based Lease Management System, the user logs in and begins entering basic data. While they feel hopeful, there's a bit of confusion as they think, "Will this make things easier or harder?" The UI is unfamiliar, and they require guidance to navigate effectively.

3. Lease Creation

The user begins creating lease records, filling in fields like tenant info, dates, and payments. They are focused but slightly anxious, wondering, "Did I enter everything correctly?" Errors or missing validations can make this step stressful, so clear instructions and field checks are helpful.

4. Approval Process

After creating a lease, the manager clicks "Submit for Approval." They feel a bit impatient or nervous, thinking, "I hope it gets approved quickly." One major pain point here is the lack of real-time feedback or notifications regarding the approval status.

5. Payment Tracking

Once the lease is active, the user adds a payment schedule and benefits from auto-reminders for due dates. This stage brings relief and satisfaction as they think, "Now I won't forget due dates anymore." However, they sometimes forget to manually mark payments as completed.

6. Monitoring

The manager regularly views dashboards and reports to track upcoming lease expirations and payment statuses. At this point, they feel empowered and confident, saying, "I finally have control over everything." Yet, they may still find filters or reports overwhelming if not customized well.

7. Support

When technical issues arise, the user reaches out to support. They might feel irritated or worried, especially if response times are slow. Quick help resources like FAQs, chatbots, or live support would improve this stage significantly.

8. Feedback

After using the system for a while, the user shares suggestions like adding bulk upload features or better layout options. This shows they're engaged and interested, thinking, "It would be great if I could do even more with this system."

