

2. IDEATION PHASE

The Ideation Phase serves as the foundation of any successful project. It blends creativity, user empathy, and structured thinking to identify the core challenges, generate meaningful ideas, and prioritize solutions that bring tangible value to all users involved. This dynamic phase combines imagination with insight to ensure every feature addresses real-world needs.

As our project titled: “A CRM Application for Banquet Hall Booking,” the ideation process was essential to tailor the system to the specific needs of venue managers, event organizers, service vendors, and customers. By deeply understanding their workflows and challenges, we focused on creating a solution that streamlines bookings, improves client communication, and enhances overall event planning efficiency

2.1 Brainstorming & Idea Prioritization Template

Step 1: Team Gathering, Collaboration, and Selecting the Problem Statement

Our team convened with the goal of identifying inefficiencies in the current banquet hall booking process and proposing a tech-enabled solution using Salesforce. Through collaborative brainstorming sessions, digital whiteboards, and real-world scenario mapping, we collectively analyzed the operational challenges faced by banquet hall managers, event organizers, and support staff. We examined existing workflows and discovered that most banquet halls still rely on fragmented and manual systems for managing:

- Booking and scheduling of halls
- Customer communications and inquiries
- Payment tracking and invoice generation
- Event coordination and vendor assignment

After several discussions and stakeholder reviews, we clearly articulated the core issue:

Problem Statement:

“Banquet hall operators lack a centralized digital platform to manage bookings,

customer data, payments, and vendor coordination in real time. The current manual processes are inefficient, prone to conflicts, and limit visibility into business performance.”

This statement became the cornerstone of our project scope and set the direction for developing a tailored, CRM-powered platform that would streamline operations and elevate the customer experience.

Step 2: Brainstorm, Idea Listing, and Grouping

We conducted a collaborative brainstorming session using a digital whiteboard where each team member contributed raw ideas based on industry research and user needs. The ideas were then reviewed and grouped into major themes:

- **Booking & Scheduling:** centralized calendar for multiple halls, real-time conflict detection
- **Customer Relationship Management:** client profiles, preferences, event history
- **Communication & Notifications:** automated email/SMS/WhatsApp reminders and confirmations
- **Analytics & Reporting:** dashboards showing revenue trends, hall utilization, peak booking seasons
- **Access Control & Security:** role-based permissions for managers, vendors, and staff

From a pool of 25–30 ideas, we clustered and shortlisted those that directly improved efficiency, reduced manual work, and elevated the customer experience. These formed the foundation for our product roadmap.

Step 3: Idea Prioritization

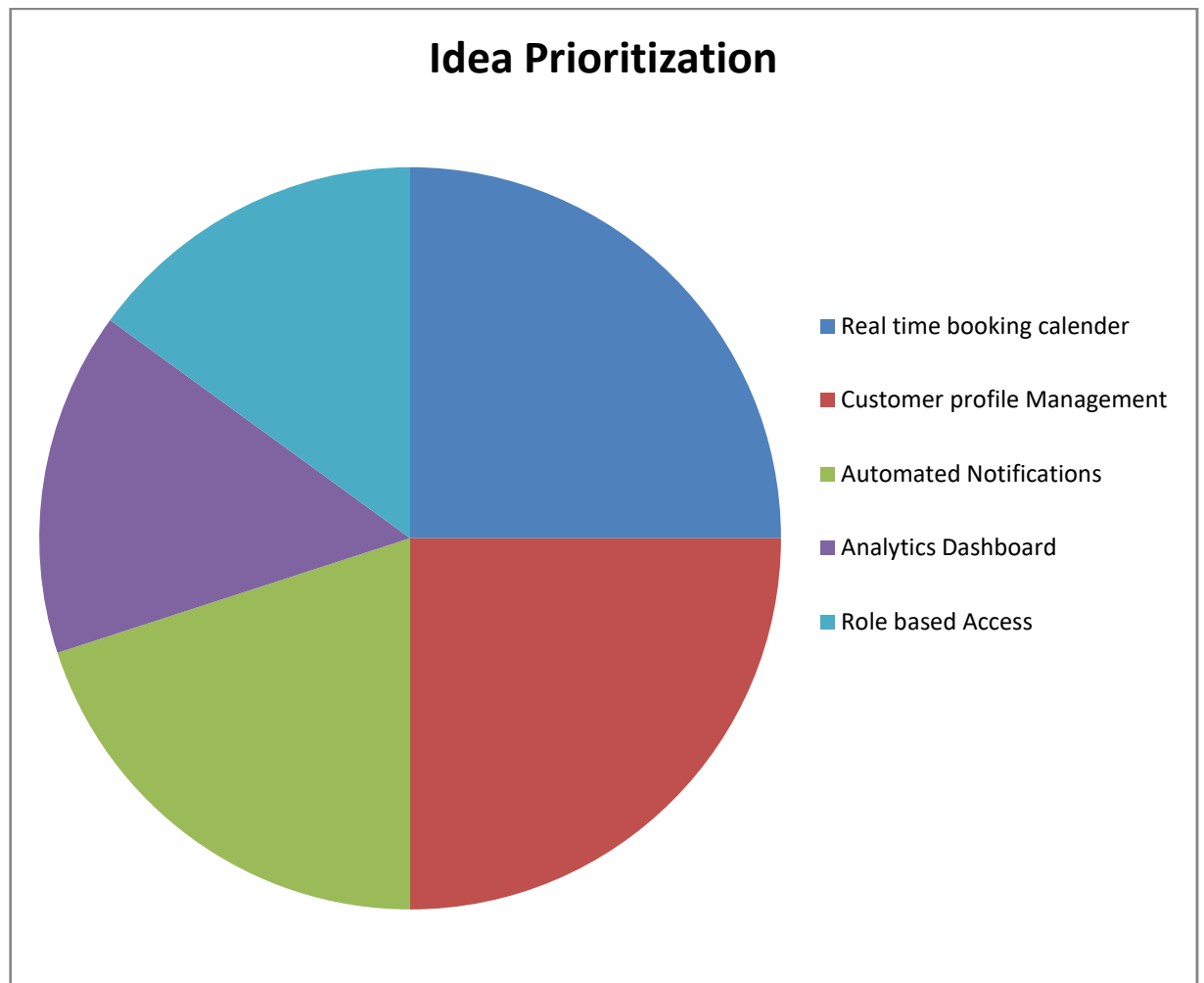
Each clustered idea was carefully evaluated against three key criteria:

- **Feasibility** – Ease of implementation using Salesforce’s capabilities
- **Impact** – How significantly the feature would improve venue operations
- **Urgency** – Whether the idea addressed an immediate operational or user-facing challenge

To narrow down the MVP (Minimum Viable Product) scope, we used a decision matrix that helped surface the highest-value features.

- **Top Priority Features:**
 - Real-time booking calendar with conflict prevention
 - Customer profile management and event history tracking
 - Automated reminders and confirmations (via SMS/Email/WhatsApp)
 - Interactive dashboards showing hall utilization, revenue, and peak demand times
 - Secure, role-based access for admins, coordinators, and vendors

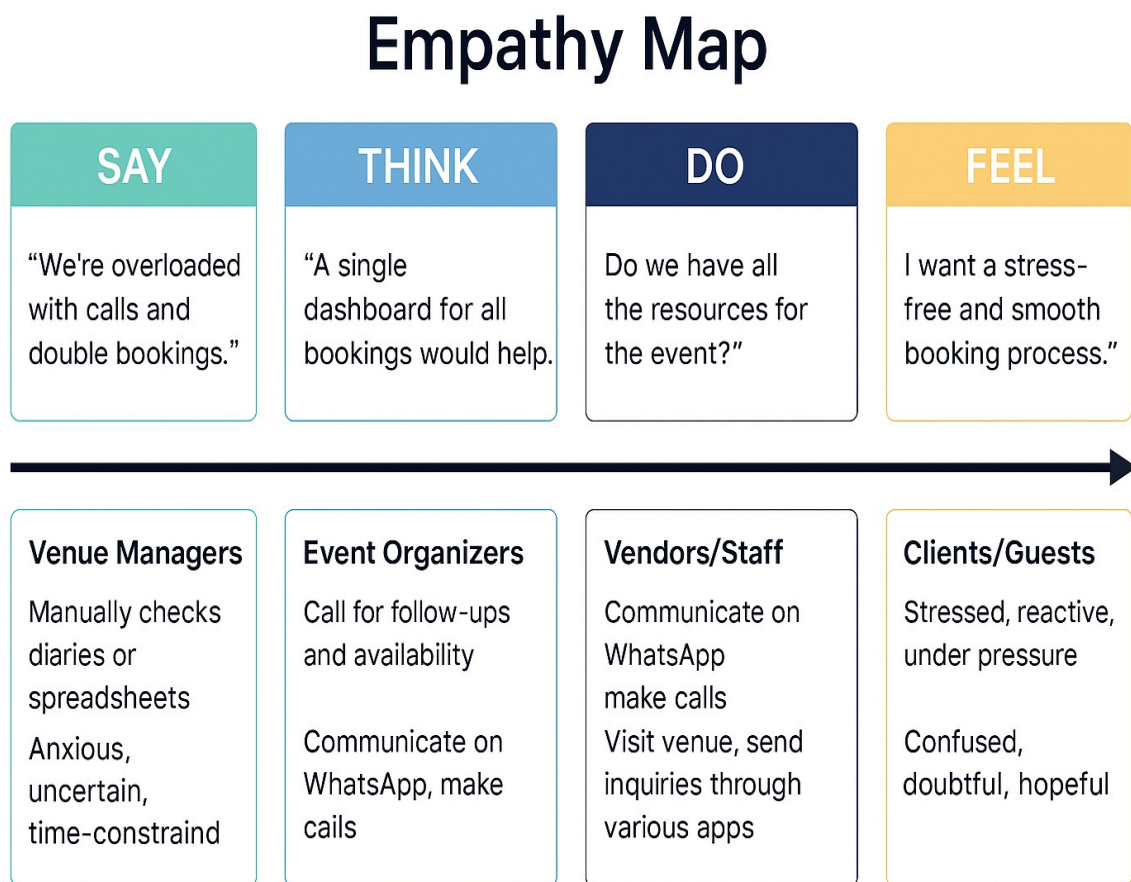
These features were prioritized for their direct impact on streamlining operations



2.2 Empathy Mapping- Empathize & Discover

Empathy Map Canvas

An **empathy map** is a visual tool that helps teams develop a deeper understanding of users' experiences, frustrations, and aspirations. We used this tool to map the daily journey of key banquet hall booking stakeholders—including **venue managers, event coordinators, vendors, and customers**—to surface the emotional and operational realities they face.



By stepping into the user's shoes, we ensured that our Salesforce CRM features (formulas, flows, triggers, dashboards) directly addressed their key frustrations.

2.3 Define the Problem Statements

Customer Problem Statement Template

Banquet hall operators and event managers currently manage bookings, customer interactions, and vendor coordination through fragmented and often manual processes. This results in scheduling conflicts, missed follow-ups, payment tracking errors, and lack of visibility into overall business performance. A centralized Salesforce CRM system can streamline booking workflows, manage customer data efficiently, automate communications, and provide real-time insights through dashboards, flows, and automation. This statement reflects the expectations of venue managers and clients and served as a guiding reference for our object models, data validations, process automations, and reporting configurations.

Centralized CRM for Banquet Hall Booking

