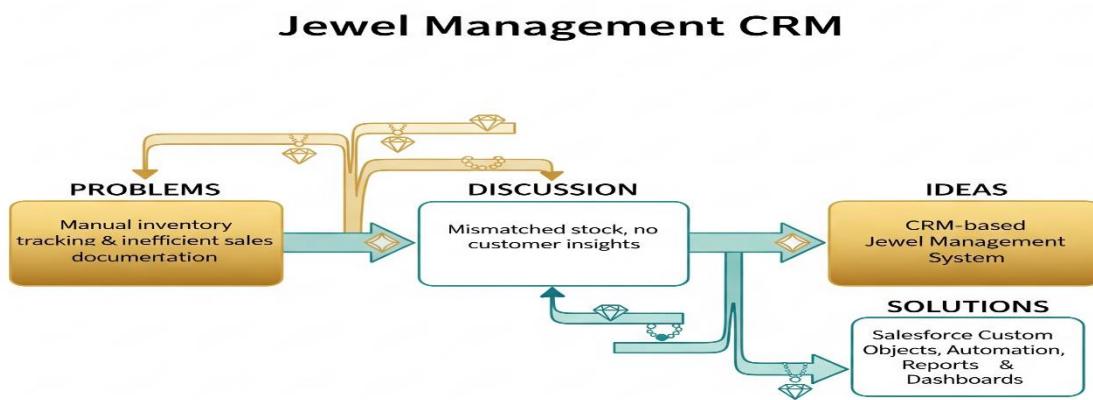


IDEATION PHASE

Brainstorm & Idea Prioritization Template

Date	1 November 2025
Team ID	NM2025TMID06045
Project Name	CRM Application for Jewel Management
Maximum Marks	4 Marks

Step-1: Team Gathering, Collaboration, and Problem Selection



The team collaboratively identified the problem faced by jewellery businesses—manual tracking of inventory and inefficient sales documentation. After brainstorming, the consensus was to develop a CRM-based Jewel Management System capable of handling product data, sales workflows, and automated reporting.

Step-2: Brainstorming, Idea Listing, and Grouping

Brainstorm:

Team members discussed pain points such as mismatched stock records, lack of customer insights, and time-consuming sales entries.

Idea Listing:

- Automated inventory tracking using custom Salesforce objects.
- Real-time stock updates after each transaction.

- Dashboard visualization of sales and stock levels.
- Alerts for low-stock and high-value items.
- Integrated customer relationship management module.

Grouping:

Ideas were grouped under three key categories:

1. Inventory Management
2. Sales Automation
3. Customer Relationship Management (CRM)

Action Planning:

Each feature was assigned specific milestones—from data modelling to report creation—using Salesforce tools such as flows, validation rules, and dashboards.

Step-3: Idea Prioritization

Idea prioritization was performed to focus on features that provide the greatest operational impact. The core priority areas included:

- **Data Modelling:** Creating custom objects for Jewellery Items, Categories, and Transactions.
- **Salesforce App Creation:** Developing a dedicated Jewel CRM app.
- **User Interface Customization:** Personalized UI for sales managers and inventory staff.
- **Automation:** Implementation of formula fields, validation rules, and field dependencies.
- **Flows and Email Alerts:** Automating item updates and purchase confirmations.
- **Reports & Dashboards:** Generating insights on stock valuation, top-selling items, and daily revenue.

This structured prioritization ensures that the system aligns with both business efficiency and customer satisfaction.