IDEATION PHASE – DOCUMENT 1: CRM Application for Jewel Management

Date	05 November 2025
Team ID	NM2025TMID05287
Project Name	CRM Application for Jewel Management
Maximum Marks	4 Marks

Title: CRM Application for Jewel Management

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1. Objective

- To develop a CRM system that simplifies jewelry business operations.
- To maintain customer records and purchase history efficiently.
- To automate sales, billing, and inventory management.
- To track jewelry repairs and services in real-time.
- To generate reports and dashboards for business insights.
- To improve customer satisfaction and business performance.

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2. Brainstorming Process

The brainstorming process was carried out to generate, discuss, and refine ideas for developing the CRM Application for Jewel Management. The process involved several structured steps to ensure all ideas were practical and relevant to jewelry business needs.

Step 1: Problem Identification

- Identified challenges faced by jewelry stores such as manual record-keeping, poor customer follow-up, inventory mismanagement, and lack of digital billing.
- Discussed the need for a system to automate and centralize these processes.

Step 2: Idea Generation

- Conducted group discussions among team members and domain experts.
- Generated ideas for modules like Customer Management, Sales & Billing, Inventory, Repair Tracking, and Dashboard Reports.

- Explored features such as real-time updates, GST billing, and customer feedback tracking.

Step 3: Idea Evaluation

- Analyzed each idea based on feasibility, technical complexity, and impact.
- Removed redundant or unrealistic ideas.
- Selected the most useful and achievable ones for the project.

Step 4: Final Selection

- Finalized features such as centralized customer data, automated billing, stock management, repair tracking, and analytics dashboard.
- Documented selected ideas for implementation in the project.

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3. Stakeholders Involved

Stakeholder	Role
Jewelry Shop Owner	Oversees business operations and analytics
Sales Staff	Handles customer transactions and updates CRM records
Inventory Manager	Manages jewelry stock and pricing
Repair Technician	Tracks service orders and updates job statuses
Customer	Receives timely updates, bills, and service notifications

4. Idea Generation Methods

- **Brainstorming Sessions:** Conducted group discussions to generate ideas for key CRM features.
- **Interviews & Feedback:** Collected inputs from jewelry shop owners and staff about common business challenges.
- **Market Research:** Studied existing jewelry management systems to identify gaps and improvement areas.
- **Mind Mapping:** Organized and connected related ideas for modules like sales, inventory, and customer management.

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5. Consolidated Ideas

- Centralized customer database with purchase history.
- Automated billing and invoice generation.
- Jewelry inventory tracking and stock alerts.
- Repair and service request management.
- Sales analytics dashboard for reports and insights.
- Role-based access for admin, staff, and managers.
- Notification system for customers (offers, updates, reminders).

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6. Rationale for Choosing Salesforce

- **Low-code development:** Easy to build and customize applications.
- **Data security:** Ensures safe handling of customer and sales data.
- **Automation tools:** Simplifies tasks like billing, notifications, and service tracking.
- **Scalability:** Can handle growing business and customer data efficiently.
- **Analytics & Reports:** Provides real-time insights into sales and performance.

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7. Outcome of Brainstorming

- The brainstorming sessions helped finalize the key features and structure of the CRM Application for Jewel Management. The team identified essential modules such as Customer Management, Sales & Billing, Inventory Tracking, Repair Management, and Reports Dashboard.
- The outcome was a clear project plan with well-defined objectives, user roles, and system functionalities to meet the jewelry business needs effectively.