

CRM APPLICATION FOR JEWEL MANAGEMENT

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Title: CRM Application For Jewel Management

Maximum Marks: 10 Marks

Ideation Phase - Empathize & Discover

1. Empathize Phase

The empathize phase focuses on deeply understanding users' needs, pain points, challenges, and strategic goals. For a jewel management CRM, the key user groups include jewel store owners, sales staff members, inventory managers, financial analysts, and end customers. Understanding these diverse perspectives is critical for developing a solution that genuinely addresses real operational challenges.

Empathize Phase Objectives

- **Workflow Understanding:** Comprehensively understand the daily workflow and operational procedures of jewelers and store staff members
- **Pain Point Identification:** Identify specific pain points and challenges in managing inventory, customer relationships, billing operations, and reporting
- **Customer Insights:** Gather comprehensive insights about customer expectations, data privacy concerns, and preferences for communication and engagement
- **Operational Challenges:** Understand current manual processes, bottlenecks, and areas where automation could provide significant value
- **Business Goals Alignment:** Understand organizational objectives and how CRM implementation can support business growth and customer satisfaction

Methods & Activities for Empathize Phase

1. In-Depth Interviews:

- Conduct comprehensive interviews with store owners about challenges in customer tracking, order management, and billing accuracy
- Interview sales executives about difficulties in accessing customer history, managing follow-ups, and tracking commission-eligible transactions
- Speak with inventory managers about challenges in maintaining accurate stock levels, tracking high-value items, and managing reorder processes

- Gather customer feedback on their experience with the store, satisfaction with service, and preferences for communication

2. Structured Surveys & Questionnaires:

- Develop comprehensive surveys for store managers addressing frequency of stock-outs, complexity of customer follow-up processes, and reporting time requirements
- Create questionnaires for sales staff about time spent on administrative tasks versus customer engagement
- Distribute customer satisfaction surveys assessing service quality, communication effectiveness, and product recommendations

3. Direct Observation & Shadowing:

- Observe store staff handling customer interactions, documenting current processes and pain points
- Shadow inventory managers during stock checks and reorder activities
- Note repetitive manual tasks that could be automated and streamlined
- Document communication processes between store departments and with customers
- Identify information silos preventing cross-functional collaboration

4. Comprehensive Persona Creation:

- **Jewel Store Owner Persona:** Needs quick insights on sales trends, inventory valuations, profitability metrics, and strategic business decisions for growth
- **Sales Executive Persona:** Requires easy access to comprehensive customer history, purchase patterns, pending follow-ups, and commission calculations
- **Inventory Manager Persona:** Wants accurate real-time stock levels, intelligent reorder alerts, high-value item tracking, and location management
- **Customer Service Representative Persona:** Needs customer contact information, interaction history, service preferences, and quick access to order status information
- **End Customer Persona:** Values personalized offers, convenient order tracking, timely communication, and excellent service quality

Expected Key Insights from Empathize Phase

- **Communication Gaps:** Delays in customer follow-ups due to lack of automated reminders and systematic tracking mechanisms
- **Inventory Challenges:** Difficulty tracking high-value items effectively and maintaining accurate billing status for valuable jewelry
- **Manual Process Inefficiencies:** Manual record keeping causing errors in inventory tracking and pricing accuracy
- **Customer Expectations:** Customers desire personalized offers, timely notifications about new collections, and transparent communication throughout the sales process

- **Data Fragmentation:** Information scattered across multiple systems, spreadsheets, and manual records preventing holistic business visibility
- **Staff Burden:** Sales and support staff spending excessive time on administrative tasks rather than customer engagement
- **Reporting Needs:** Management lacking real-time business intelligence for data-driven decision making

2. Discover Phase

The discover phase involves defining specific problems and identifying opportunities based on comprehensive insights gathered during the empathize phase. This phase translates raw feedback into actionable problem statements and feature opportunities that the CRM solution can address.

Discover Phase Objectives

- **Problem Identification:** Identify specific pain points that a modern CRM solution can effectively solve
- **Opportunity Mapping:** Map out opportunities for automation, improved user experience, and operational efficiency gains
- **Solution Alignment:** Ensure identified opportunities align with business objectives and user needs
- **Prioritization Framework:** Establish priorities based on business impact and user need intensity
- **Feature Roadmap:** Develop a clear roadmap of features to implement in subsequent development phases

Discover Phase Activities

1. Affinity Mapping & Data Analysis:

- Systematically group insights from interviews, surveys, and observations into logical categories
- Create affinity maps organized around major themes: Customer Management, Inventory Operations, Billing & Pricing, Analytics & Reporting, Notifications & Alerts
- Identify common patterns and trends appearing across multiple user interviews and feedback sources
- Prioritize insights based on frequency of mention and business impact potential

2. Customer Journey Mapping:

- Visualize the complete customer journey from initial inquiry through purchase, billing, and post-sale follow-up
- Map current-state journey showing steps, touchpoints, decision points, and pain points
- Identify friction points where customers experience delays, confusion, or dissatisfaction
- Identify gaps where better communication or service could improve customer experience

- Highlight opportunities for proactive engagement and personalization

3. Problem Statement Formulation:

- Convert empathy insights into clear, actionable problem statements focused on real user needs:
 - **"Sales executives spend excessive time manually tracking customer orders and managing follow-ups, resulting in missed sales opportunities and reduced customer satisfaction."**
 - **"Inventory managers lack real-time stock level visibility and automated alerts, causing delayed restocking, potential stockouts, and lost sales revenue."**
 - **"Manual billing processes and pricing calculations lead to frequent errors, customer disputes, and administrative overhead."**
 - **"Store owners cannot access real-time business intelligence, making data-driven strategic decisions difficult and time-consuming."**
 - **"Customers experience inconsistent communication and lack transparency about order status, leading to dissatisfaction and reduced repeat business."**

4. Opportunity Areas & Feature Opportunities:

Opportunity Area	Specific Opportunities	Business Impact
Automated Customer Follow-up	Intelligent reminder systems for birthdays, anniversaries, and personalized product recommendations	Increased repeat sales and customer lifetime value
Real-time Inventory Tracking	Live inventory visibility across locations with automated low-stock alerts and intelligent reorder suggestions	Reduced stockouts, improved inventory turnover, lower carrying costs
Integrated Billing & Pricing	Centralized billing system with automated calculations, real-time pricing, and discount management	Reduced billing errors, improved accuracy, faster processing
Personalized Customer Notifications	Targeted offers based on customer preferences, purchase history, and behavioral patterns	Higher engagement rates, improved conversion, customer satisfaction
Executive Dashboards & Analytics	Real-time business intelligence dashboards showing sales trends, inventory status, and profitability metrics	Better decision-making, strategic insights, competitive advantage
Customer Self-Service Portal	Customers can track orders, view history, and communicate with store staff	Reduced support burden, improved customer satisfaction
Mobile Field Access	Sales staff can access customer information and inventory on mobile devices during customer consultations	Improved sales effectiveness, better customer service quality
Automated Workflow Orchestration	Business rules and automated workflows for order processing, approval, and notifications	Improved efficiency, reduced manual work, consistency

User Personas

Persona 1: Rajesh Sharma - Jewel Store Owner

- **Age/Background:** 45 years old, 15 years in jewelry retail business, operating 3 store locations
- **Goals:** Maximize profitability, increase customer retention, expand to new markets, maintain inventory quality standards
- **Pain Points:** Limited visibility into real-time sales performance, difficulty tracking inventory across locations, manual reporting processes consuming significant time
- **Technology Comfort:** Moderate – comfortable with business software but prefers intuitive interfaces
- **Priorities:** Real-time business dashboards, inventory valuation tracking, profitability analysis

Persona 2: Priya Patel - Sales Executive

- **Age/Background:** 32 years old, 8 years in jewelry sales, proven track record of customer relationships
- **Goals:** Achieve sales targets, build customer relationships, maximize commission earnings, improve customer satisfaction scores
- **Pain Points:** Time spent on administrative tasks reduces customer engagement time, difficulty accessing customer history during sales conversations, inconsistent follow-up
- **Technology Comfort:** High – experienced with CRM systems and digital tools
- **Priorities:** Customer history access, automated reminders, mobile accessibility, easy order creation

Persona 3: Arun Kumar - Inventory Manager

- **Age/Background:** 38 years old, 10 years in inventory management, detail-oriented and highly organized
- **Goals:** Maintain accurate inventory records, prevent stockouts, minimize shrinkage, optimize inventory valuation
- **Pain Points:** Manual inventory tracking prone to errors, difficulty identifying slow-moving items, lack of real-time stock alerts
- **Technology Comfort:** Moderate – prefers practical tools with clear functionality
- **Priorities:** Real-time stock visibility, automated reorder alerts, barcode scanning integration, loss prevention tracking

Persona 4: Meera Singh - Customer Service Representative

- **Age/Background:** 28 years old, 5 years in customer service, passionate about customer satisfaction
- **Goals:** Resolve customer issues quickly, provide excellent service, build long-term customer relationships

- **Pain Points:** Limited access to complete customer information, difficulty tracking order status, manual note-taking causing information loss
- **Technology Comfort:** High – quick learner, enthusiastic about digital solutions
- **Priorities:** Complete customer information, order tracking capability, communication history, quick resolution tools

Persona 5: Vikram Desai - Jewelry Retail Customer

- **Age/Background:** 42 years old, high-income professional, values quality and personalized service
- **Goals:** Purchase high-quality jewelry, receive personalized recommendations, be valued as a customer
- **Pain Points:** Difficult to track what he purchased previously, inconsistent service experiences, delayed communication about new collections
- **Technology Comfort:** High – active online user, expects digital convenience
- **Priorities:** Order tracking, personalized recommendations, easy communication channels, convenient purchasing

Empathy Maps

Empathy Map - Jewel Store Owner

What They Say	What They Think	What They Do	What They Feel
"I need better visibility into my inventory"	"Am I losing sales due to stockouts?"	Manually reviews inventory reports	Stressed about business growth
"Our billing processes are inefficient"	"We're making too many errors"	Spends hours reviewing transactions	Frustrated with manual processes
"Customer relationships are important"	"I wish we could personalize offers more"	Reviews customer files manually	Concerned about customer retention
"I want real-time business insights"	"Data-driven decisions would help growth"	Uses spreadsheets for analysis	Overwhelmed with information gathering

Empathy Map - Sales Executive

What They Say	What They Think	What They Do	What They Feel
"I waste time on paperwork"	"I should be spending time with customers"	Spends 3+ hours daily on admin tasks	Frustrated with lost selling time
"I need customer history readily available"	"Quick access would close more deals"	Struggles to recall customer details	Anxious during customer meetings
"Follow-ups are challenging"	"I miss some customer opportunities"	Relies on memory for follow-ups	Guilty about missed opportunities

What They Say	What They Think	What They Do	What They Feel
"Mobile access would be great"	"I could help customers on the floor"	Uses paper notes during consultations	Eager for technology enablement

Problem Statements (Developer Focus)

1. **Customer Management Challenge:** Sales executives spend excessive time manually searching for customer information and maintaining follow-up records, resulting in missed sales opportunities and reduced customer satisfaction scores.
2. **Inventory Visibility Gap:** Store managers lack real-time inventory visibility across multiple locations and cannot quickly identify low-stock situations, leading to stockouts and lost revenue.
3. **Billing Accuracy Issue:** Manual billing calculations and inconsistent pricing application cause frequent errors, customer disputes, and increased administrative overhead.
4. **Lack of Business Intelligence:** Store owners cannot access consolidated real-time business dashboards, making data-driven strategic decisions difficult and time-consuming.
5. **Customer Engagement Gap:** Customers receive inconsistent communication about orders, promotions, and new products, leading to lower engagement and repeat purchase rates.

Opportunity List for CRM Implementation

1. **Automated Customer Relationship Tracking System** – Centralized customer profiles with interaction history, purchase records, preferences, and communication logs
2. **Intelligent Inventory Management** – Real-time inventory tracking with automated low-stock alerts, barcode integration, and location tracking
3. **Automated Billing & Pricing System** – Centralized billing with automated calculations, discount management, and error-free invoicing
4. **Executive Business Dashboards** – Real-time visualization of sales metrics, inventory status, customer insights, and profitability analysis
5. **Customer Notification Engine** – Automated birthday/anniversary reminders, new product announcements, and personalized offers
6. **Mobile Sales Application** – Field-accessible customer information, inventory checking, and order creation for improved sales effectiveness
7. **Customer Self-Service Portal** – Order tracking, purchase history access, and communication channels for customer convenience
8. **Workflow Automation Framework** – Automated order processing, approval workflows, and business rule enforcement

Deliverables Summary

Deliverable	Purpose	Key Output
User Personas	Understand diverse user needs and expectations	5 comprehensive personas representing key stakeholder groups
Empathy Maps	Visualize user perspectives and emotional states	Maps showing user thoughts, feelings, actions, and pain points
Problem Statements	Define specific challenges to be addressed	5 clear problem statements focused on real user pain
Opportunity List	Identify potential CRM features and improvements	8 opportunity areas with business impact potential
Customer Journey Maps	Visualize end-to-end customer experience	Maps showing current state, friction points, and improvement opportunities

Conclusion

The empathize and discover process successfully established a comprehensive understanding of user needs, pain points, and business opportunities. Through in-depth interviews, surveys, observations, and persona development, the team identified critical challenges in customer management, inventory tracking, billing accuracy, and business intelligence. The resulting problem statements and opportunity list provide a clear foundation for developing CRM features that directly address real user needs and deliver measurable business value. This user-centric approach ensures that the subsequent design and development phases will create a solution that genuinely improves operations, enhances customer satisfaction, and drives business growth for jewelry retail organizations.