PROJECT PLANNING & SCHEDULING

| **Date** | **25-06-2025** |
| --- | --- |
| **Team Id** | **LTVIP2025TMID31256** |
| **Project Name** | **CRM Application for Jewel Management** |
| **College Name** | **Ideal Institute Of Technology** |

**Team Planning**: **JewelCRM – Smart CRM for Jewel Businesses**

## 1. Team Structure

| **Role** | **Name** | **Responsibilities** |
| --- | --- | --- |
| **Project Manager** | **Dhanush** | **Oversees planning, sprint reviews, team coordination** |
| **CRM Admin** | **Dhanush** | **Creates customer database, roles, user profiles, schema design** |
| **CRM Developer** | **Dhanush** | **Implements core CRM modules, automations, and lead workflows** |
| **Business Analyst** | **Dhanush** | **Gathers client requirements, creates user stories, maps use cases** |
| **QA/Test Engineer** | **Dhanush** | **Tests CRM modules, data flow validation, UI consistency** |
| **UI/UX Designer** | **Dhanush** | **Designs responsive screens, dashboards, and customer interaction flows** |
| **Data Analyst** | **Dhanush** | **Configures reporting, trends, customer segmentation** |
| **Scrum Master** | **Dhanush** | **Manages agile practices, handles retrospectives, daily scrums** |

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## 2. Workload Estimation by Sprint

| **Sprint** | **Focus Area** | **Roles Involved** |
| --- | --- | --- |
| **Sprint 1** | **Customer Object Setup, Lead Capture Module** | **CRM Admin, BA, PM** |
| **Sprint 2** | **Loyalty Program, Offer Engine, UI Layout** | **Developer, Designer, QA, Scrum Master** |
| **Sprint 3** | **Sales Billing Integration, Promotions** | **Developer, QA, Data Analyst, PM** |
| **Sprint 4** | **CRM Reports, Dashboard, Final Testing & Review** | **Data Analyst, QA, Designer, Scrum Master** |

## 3. Workload Estimation by Role

| **Role** | **Total Estimated Hours** | **Key Tasks** |
| --- | --- | --- |
| **Project Manager** | **20–30 hrs** | **Sprint coordination, stakeholder meetings** |
| **CRM Admin** | **40–50 hrs** | **Object/field creation, access setup** |
| **CRM Developer** | **35–45 hrs** | **Automation, workflows, loyalty logic** |
| **Business Analyst** | **20 hrs** | **Requirement gathering, user stories** |
| **QA/Test Engineer** | **25–30 hrs** | **Test cases, regression, functional tests** |
| **UI/UX Designer** | **15–20 hrs** | **Page layouts, icons, visual consistency** |
| **Data Analyst** | **15–25 hrs** | **CRM dashboards, customer analytics** |
| **Scrum Master** | **15–20 hrs** | **Daily standups, sprint retrospectives** |

## 4. Tool Stack – CRM for Jewel Management

| **Category** | **Tools Used** |
| --- | --- |
| **CRM Platform** | **Salesforce Developer Edition / Zoho CRM** |
| **Communication** | **Slack, Email, Google Meet** |
| **Documentation** | **Google Docs, Notion, Confluence** |
| **Task Tracking** | **Jira, Trello** |
| **Testing** | **Manual testing, CRM validation rules** |
| **Version Control** | **GitHub for Apex, Flow backups** |
| **Analytics** | **CRM Reports, Dashboards, Excel/Sheets** |
| **SMS/Promotion** | **Twilio, WhatsApp Cloud API** |