Phase 3: Project Design Phase - Proposed Solution

Project Title: CRM Application for Jewel Management - Developer

Date: November 01, 2025

Team ID: NM2025TMID02152

Maximum Marks: 2 Marks

Proposed Solution Template

S.No.	Parameter	Description
1	**Problem Statement** (Problem to be solved)	Jewelry businesses face unique challenges including managing high-value inventory with detailed specifications, tracking custom orders through complex production workflows, maintaining personalized customer relationships for repeat business, handling multiple pricing tiers and appraisals, ensuring security and compliance, and lacking integrated systems that connect sales, inventory, and customer service operations.
2	**Idea / Solution description**	A comprehensive Salesforce CRM application tailored for jewelry management that integrates customer relationship management, inventory tracking with certifications and valuations, custom order workflows, sales pipeline management, automated marketing, and business analytics. The system includes customer portals for order tracking, mobile access for sales staff, role-based security, and automated business rules that prevent data loss and ensure compliance.
3	**Novelty / Uniqueness**	The solution addresses jewelry-specific requirements that generic CRM systems cannot handle: tracking gemstone certifications, managing custom design workflows, handling consignment inventory, supporting trade-in valuations, maintaining detailed provenance records, and automating personalized marketing based on customer jewelry preferences and life events. Built entirely on native Salesforce platform without custom coding.
4	**Social Impact / Customer Satisfaction**	The solution enhances customer satisfaction through personalized service, transparent order tracking, and proactive communication. It builds long-term customer relationships by remembering preferences and celebrating milestones. For business owners, it reduces inventory shrinkage, improves cash flow management, and increases sales through targeted marketing. Employees benefit from streamlined workflows and reduced administrative burden.
5	**Business Model (Revenue Model) / Sustainability**	The platform serves jewelry retailers from independent boutiques to multi-location chains. Revenue model includes: subscription-based licensing (tiered by store size and features), implementation and customization services, training programs, ongoing support and maintenance contracts. The system reduces operational costs through automation and improves revenue through better inventory management and customer retention.

S.No.	Parameter	Description
6	**Scalability of the Solution**	The solution scales from single-location boutiques to multi-store chains with centralized inventory management. It can expand to include: online sales integration (e-commerce), supplier and vendor management, repair and maintenance tracking, rental programs for special occasions, auction management, and franchise operations with independent inventory control.

Solution Description

System Architecture

The Salesforce CRM platform connects key jewelry business operations:

1. **Customer Management:** Comprehensive customer profiles with purchase history, preferences (metal type, style, occasions), wish lists, sizing information, and communication preferences.

2. **Inventory & Asset Management:** Detailed tracking of jewelry items including SKU, description, metal type and purity, gemstones (type, carat, cut, clarity, color), weight, certification numbers, supplier, acquisition cost, retail price, current location, and status (available, reserved, sold, consignment).

3. **Custom Order & Production:** Design consultation records, custom specifications, design approvals, production milestones, artisan assignments, quality checks, and delivery scheduling.

4. **Sales & Opportunities:** Lead capture from walk-ins and online inquiries, opportunity tracking with probability scoring, quote generation, financing options, trade-in processing, and sales order management.

5. **Marketing Automation:** Segmented campaigns based on customer preferences, automated birthday/anniversary reminders, new collection announcements, VIP customer programs, and referral tracking.

Key Features & Workflow

- **Customer Portal:** Customers can view order status, browse their purchase history, update preferences, schedule appointments, and communicate securely with store staff.

- **Inventory Management:** Real-time stock visibility across locations, barcode/RFID scanning for check-in/check-out, automated reorder alerts, valuation updates based on market prices, and loss prevention tracking.

- **Custom Order Workflow:** Structured process from initial consultation → design approval → production tracking → quality inspection → delivery → follow-up. Automated notifications at each milestone keep customers informed.

- **Sales Pipeline:** Visual pipeline showing opportunities by stage, automated lead scoring based on engagement and budget, integrated quoting with configurable pricing rules, and conversion analytics.

- **Mobile Access:** Sales staff can access customer profiles, check inventory availability, and process transactions from mobile devices during floor consultations.
- **Business Intelligence:** Dashboards showing sales performance by category/time period, inventory turnover and valuation, customer lifetime value, marketing campaign effectiveness, and profit margins.
- **Security & Compliance:** Role-based access control (sales staff, managers, owners), audit trails for all high-value transactions, encryption for sensitive data, and compliance reporting for tax and insurance purposes.

Implementation Approach

- **Phase 1:** Configure Salesforce Sales Cloud with custom objects for jewelry-specific data (Inventory_Item, Custom_Order, Appraisal, Certification).
- **Phase 2:** Build customer-facing portal using Experience Cloud for order tracking and communication.
- **Phase 3:** Implement automated workflows using Flow Builder for order processing, inventory alerts, and marketing campaigns.
- **Phase 4:** Create dashboards and reports using Salesforce Analytics for business intelligence.
- **Phase 5:** Deploy mobile app using Salesforce Mobile and train staff on system usage.
- **Phase 6:** Pilot with one store location, gather feedback, refine processes, then roll out to additional locations.

Benefits

Stakeholder	Benefit
Customers	Personalized service, transparent order tracking, convenient online access, memorable milestone recognition
Sales Staff	Complete customer history at fingertips, streamlined order entry, mobile access during consultations, reduced administrative tasks
Store Managers	Real-time inventory visibility, sales performance analytics, automated marketing campaigns, reduced shrinkage
Business Owners	Improved cash flow management, data-driven decision making, scalable multi-location operations, increased customer lifetime value

Conclusion

The proposed Salesforce CRM solution for jewelry management addresses the unique operational challenges of jewelry retail through specialized customer relationship management, inventory tracking, custom order workflows, and business analytics. By leveraging native Salesforce capabilities, the platform provides a secure, scalable, and cost-effective solution that enhances customer satisfaction while improving operational efficiency and profitability for jewelry businesses.