Ideation Phase

Empathize & Discover

Date	01 NOV 2025
Team ID	NM2025TMID02152
Title	CRM Application For Jewel Management
Maximum Marks	10 Marks

1. Empathy Phase

The main goal of the Empathy Phase is to deeply understand the users — their needs, pain points, motivations, and goals — to design a CRM system that genuinely solves their problems and enhances their daily operations.

Objectives:

- Understand the workflow of jewellers and staff.

- Identify pain points in managing inventory, customer relationships, and billing.

- Gather insights about customer expectations and data management.

Methods/Activities:

1. **Interviews**:

   o Talk to jewellers about challenges in customer tracking, orders, and billing. o Ask staff about difficulties in stock management, pricing updates, or alerts for pending orders.

2. **Surveys/Questionnaires**:

   o Send structured questions to store managers about frequency of stock-outs, customer follow-ups, and reporting requirements.

3. **Observation / Shadowing**:

   o Observe how staff currently handle customer interactions, billing, and inventory.

- o   Note any repetitive manual tasks that could be automated.

4. **Persona Creation**:

   - o Create personas like:

     + *Jewel Store Owner* – needs quick insights on sales trends.

     + *Sales Executive* – needs easy access to customer history and follow-ups.

     + *Inventory Manager* – wants accurate stock levels and reorder alerts.

Insights Expected:

- Delays in customer follow-ups due to lack of reminders.

- Difficulty tracking high-value items and their billing status.

- Manual record keeping causing errors in inventory and pricing.

- Customers often want personalized offers and notifications.

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2. **Discover Phase**

The discover phase is about **defining specific problems and opportunities** based on insights from Empathize.

Objectives:

- Identify pain points that a CRM can solve.

- Map out opportunities for automation and improved user experience.

Activities:

1. **Affinity Mapping**:

   - o   Group insights from interviews and observations into categories (Customer Management, Inventory, Billing, Reporting, Notifications).

2. **Customer Journey Mapping**:

- o Visualize the steps from customer inquiry → purchase → billing → follow-up.

- o Identify friction points or gaps in the journey.

3. **Problem Statement Formulation**:

 o Convert insights into clear problem statements, e.g.:

  + "Sales executives spend too much time manually tracking customer orders, leading to missed follow-ups."

  + "Inventory managers lack real-time alerts for low stock, causing delayed restocking."

4. **Opportunity Areas**:

- o Automated customer follow-up reminders. o Real-time inventory tracking with alerts. o Integrated billing and pricing management.

- o Personalized customer notifications/offers.

Deliverables for Developer's Ideation Phase:

1. **User Personas** – for each key role.

2. **Empathy Map** – documenting what users say, think, do, and feel.

3. **Problem Statements** – focused on actionable CRM features.

4. **Opportunity List** – potential features to prototype in later stages.