

Phase 1: Brainstorming, Idea Generation, and Prioritization

Project Title: CRM Application for Jewel Management - Developer

Date: November 01, 2025

Team ID: NM2025TMID02152

Maximum Marks: 4 Marks

Purpose and Approach

This phase involves ideation and strategic planning to build a Salesforce-based CRM application for jewel management that streamlines customer relationship management, inventory tracking, sales operations, and customer service for jewelry businesses. The objective is to identify challenges in the jewelry retail sector and brainstorm creative solutions that maximize customer satisfaction, operational efficiency, and business growth.

Team Collaboration & Problem Statement

- The project team collaborated to identify key challenges in jewelry business management: tracking high-value inventory, managing customer preferences and custom orders, maintaining customer relationships for repeat business, handling complex pricing and appraisals, and ensuring security and compliance.
- Each team member shared experiences from retail and CRM domains and reviewed industry-specific solutions for luxury goods and jewelry management.

Brainstorming & Idea Listing

Team Member	Initial Idea	Built-On Idea
Team Member 1	Create comprehensive customer profiles with purchase history and preferences	Add wish list tracking and anniversary/birthday reminders for personalized marketing
Team Member 2	Develop inventory management with real-time stock tracking and valuation	Integrate barcode/RFID scanning and automated reorder alerts
Team Member 3	Build custom order tracking system for bespoke jewelry	Add design approval workflows and progress notifications to customers
Team Member 4	Implement sales pipeline management with lead scoring	Create targeted campaigns based on customer segments and purchase patterns

- Team members freely shared ideas for customer engagement, inventory control, sales automation, and security features.
- Ideas were compiled to ensure comprehensive coverage of all jewelry business operations.

Grouping, Prioritization, and Action Planning

- Ideas were organized into categories: customer relationship management, inventory and asset tracking, custom order management, sales and marketing automation, reporting and analytics, and security and compliance.
- Prioritized for maximum business impact: customer profile management, inventory tracking with valuations, custom order workflows, automated marketing campaigns, and comprehensive dashboards.
- Visual workflow diagrams and data models were created to illustrate the system architecture and user journeys.

Action Plan & Next Steps

Chosen ideas were developed into actionable tasks:

- Design Salesforce data model for customers, inventory items (with certification tracking), custom orders, and sales opportunities.
- Build customer portal for order tracking and communication.
- Develop inventory management module with valuation and security features.
- Create automated marketing workflows for customer retention and upselling.
- Design executive dashboards for sales performance, inventory valuation, and customer insights.
- Schedule weekly sprints to iterate on features and gather stakeholder feedback.

Conclusion

This brainstorming and prioritization phase established a clear roadmap for developing a comprehensive Salesforce CRM solution for jewelry management. By organizing ideas systematically and assigning actionable tasks, the team is positioned to create a scalable, secure, and customer-centric platform that addresses the unique challenges of the jewelry retail industry.