Project Title: Golden Era Enterprises CRM

Problem Statement:

Jewelry stores like Golden Era Enterprises face challenges in managing customer relationships, tracking sales, and offering personalized services. Customers often do not receive timely updates on new collections, exclusive offers, or important services such as repairs and maintenance. Sales staff may not have access to complete customer profiles or purchase history, making it difficult to deliver personalized recommendations or upsell effectively. Inventory tracking and post-sale services like resizing or repair updates are often handled manually, resulting in inefficiencies and delays. There is no single system that connects customer preferences, sales data, inventory, and marketing efforts—making it harder to deliver a seamless and memorable shopping experience.

Proposed Salesforce Solution:

- Customers create profiles with their preferences, past purchases, anniversaries, and style interests.
- Sales team records interactions and purchase history directly in the CRM.
- Salesforce sends automated notifications to customers about:
    - New arrivals
    - Personalized offers
    - Service reminders (e.g., maintenance, cleaning, or repair updates)
- Inventory is tracked in real-time, showing availability across collections and categories.
- Appointments for in-store visits or virtual consultations can be scheduled and tracked inside Salesforce.
- Dashboards provide real-time insights to store managers showing:
    - Top-selling products and collections
    - Customer buying trends
    - Inventory levels and reorder alerts
    - Customer engagement and service history

PHASE 1: PROBLEM UNDERSTANDING & INDUSTRY ANALYSIS

Project Title: Golden Era Enterprises CRM – Elevating Jewelry Retail with Smart Customer Engagement

1. REQUIREMENT GATHERING

Goal: Understand the business needs and pain points.

- Talk to store managers, sales staff, marketing, and inventory teams.
- Identify current issues like manual tracking, poor customer communication, and lack of personalization.
- Gather real examples of what users want Salesforce to do.

2. STAKEHOLDER ANALYSIS

Goal: Identify who will use or benefit from the CRM.

Internal Users:

- Sales Team: Needs customer history and inventory info.
- Managers: Want reports and dashboards.
- Marketing Team: Needs customer data for targeted campaigns.
- Inventory Staff: Needs live stock updates and alerts.

External Users:

- Customers: Want timely updates, offers, and personalized service.

3. BUSINESS PROCESS MAPPING

Goal: Understand how work is currently done and where Salesforce can help.

Key Areas:

- Customer onboarding is manual.
- No system to track customer purchases.
- Inventory is tracked separately, often manually.
- No proper tracking of post-sale services like repairs or resizing.
- Marketing messages are not personalized.

How Salesforce Helps:

- Automates data entry and updates.
- Centralizes sales and customer info.
- Tracks inventory in real-time.
- Sends automatic reminders and personalized offers.

4. INDUSTRY USE CASE ANALYSIS

Goal: Understand jewelry industry needs to design a better CRM.

Jewelry Retail Needs:

- Personalized customer service (preferences, occasions).
- Follow-ups for high-value purchases.
- Regular reminders for cleaning or repairs.
- Building long-term customer loyalty.

Salesforce Solutions:

- Custom fields for preferences, ring size, etc.
- Service Cloud for tracking repairs.
- Marketing automation for events like birthdays or anniversaries.
- Dashboards to track trends and performance.

5. APPEXCHANGE EXPLORATION

Goal: Find ready-to-use Salesforce apps that add value.

Helpful App Types:

- Appointment booking
- Loyalty and rewards management
- Inventory and repair tracking

Action Steps:

- Explore top-rated apps on AppExchange.
- Check for compatibility with Sales or Service Cloud.
- Choose between using apps or custom development.