Project Planning Phase
Project Planning Template

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Name	Motapothu Hima Sai Sindhu
Project Name	HandsMen Threads – Elevating the Art of Sophistication in Men's Fashion

1.Project Goal:

To build a cloud-based Salesforce CRM application (HandsMen Threads) that centralizes customer management, order tracking, inventory control, and marketing campaign automation for fashion retailers, ensuring seamless operations and customer satisfaction.

2. Project Timeline:

Phase	Duration	Focus
Initiation & Planning	2 days	Requirement Gathering, team setup, tool selection
Sprint 1	7 days	CRM object creation, field definitions, tab setup, Automation with Flows, Email Alerts
Sprint 2	7 days	Validation Rules, Dashboard & Report setup, User profile configuration
Testing & Feedback	2 days	User Acceptance Testing (UAT), Bug Fixing
Final Deployment	1 day	Dashboard activation, app deployment, training

3. Sprint Breakdown:

Sprint 1: CRM Setup

- Epic: Object and Field Configuration

o Create custom objects (Customer, Order, Product, Inventory, Campaign) – 5 points
o Add necessary fields (email, phone, picklists) – 3 points
o Setup navigation tabs – 2 points
o Setup user roles and profiles – 3 points
o Create Dashborads – 2 points

- Total Story Points: 15

Sprint 2: Automation & Logic

- Epic: Flows, Validation & Notifications
- Create flows for order confirmation, loyalty updates – 5 points Validation
- rules (email format, quantity checks) – 3 points
- Setup email alerts – 2 points
- Create reports for managers – 5 points
- Total Story Points: 15

4. Velocity:

- Total Story Points: 30
- Number of Sprints: 2
- Velocity = 30 ÷ 2 = 52 Story Points per Sprint

5.Tools & Technologies:

- **Platform**: Salesforce Lightning
- **Automation**: Apex Triggers, Flows, Validation
- **Access Management:** Profiles, Roles, Premission Sets
- **Reports & Dashboards**: Salesforce Reporting Tools

6. Access Control

- **Profiles**: System Admin, Sales Manager, Inventory Manager, Marketing Executive
- **Roles**: Sales, Inventory, Marketing
- **Permission Sets**: HandsMen CRM Access

7. Reporting & Monitoring

- Create reports:
  - Product vs. Stock
  - Customer vs. Loyalty Tier
  - Orders by Status
- Dashboards:
  - Sales Dashboard
  - Inventory Status Dashboard

8. Testing & Feedback

- Unit Testing: For flows, triggers, and formulas
- UAT: User Acceptance Testing by assigned users
- Feedback: Collected and implemented before deployment

9. Final Deployment

- Activate dashboards and flows
- Assign user roles
- Conduct onboarding and training

Summary:

Phase	Output
Initiation	Scope, timelines, tools, and roles finalized
Sprint 1	Objects and fields created, navigation set up, Automation, validation,
Sprint 2	Email alerts configured, Reports, dashboards, and role access established
Testing	Workflows tested, feedback reviewed
Deployment	System live with assigned users