Phase 2: Project Planning Phase

Project Title: CRM Application for Jewellery Management

Introduction

Project planning is an essential step that defines how the project will be executed, monitored, and completed. It ensures that every activity in the project is properly scheduled and managed. For the **CRM Application for Jewellery Management**, careful planning is done to organize the development process, allocate tasks, and set a clear timeline for successful project delivery.

Project Overview

The Jewellery CRM Application is designed to help jewellery businesses manage customer details, jewellery inventory, and sales operations efficiently using Salesforce. The planning phase outlines the goals, activities, tools, roles, and schedule that will guide the project from start to finish.

Project Goals

1. To develop a Salesforce-based CRM for managing jewellery and customer details.
2. To automate the jewellery sales and service tracking process.
3. To design dashboards and reports for data-driven decision-making.
4. To improve communication between customers and store staff.
5. To deliver a user-friendly and efficient jewellery management system.

Tools and Technologies Used

The project is developed using the **Salesforce CRM platform**, which provides various built-in tools for automation, data management, and analytics. The main tools include:

- **Salesforce Developer Edition:** For creating and testing the CRM application.

- **Objects and Relationships:** To store jewellery, customer, and order details.

- **Flows and Automation Tools:** For automating tasks like notifications and data updates.

- **Dashboards and Reports:** To analyze performance and monitor sales.

- **SmartInternz Portal:** To track progress and submit project deliverables.

- **GitHub:** For maintaining project documentation and video links.

Team Structure and Roles

A clear division of roles helps in smooth progress and accountability. The roles for this project include:

- **Project Lead:** Oversees the entire project and ensures all phases are completed on time.

- **Salesforce Developer:** Develops and configures objects, fields, workflows, and dashboards in Salesforce.

- **Document Specialist:** Prepares all project phase documents and maintains proper formatting.

- **Tester:** Tests the CRM functions such as record creation, update, and report generation.

- **Video Presenter:** Records and explains the demo video of the completed project.

(If you are doing it individually, you can mention that you are performing all the above roles.)

Risk Management

Every project can face risks such as technical issues, data loss, or time delays. To minimize these risks:

- Regularly back up project data in Salesforce and GitHub.

- Divide tasks clearly to avoid confusion.

- Maintain regular communication within the team.

- Test each feature after development to ensure proper functionality.

Monitoring and Evaluation

Project progress will be monitored through:

- Regular review of milestones in SmartInternz.

- Tracking completion of each phase document.

- Evaluating the performance of the CRM features such as workflows, automation, and reports.

Project Timeline

The project is divided into specific tasks with expected completion periods:

Phase	Task Description	Duration
Phase 1	Ideation and topic selection	2 days
Phase 2	Planning and team setup	2 days
Phase 3	Design and development in Salesforce	5 days
Phase 4	Requirement analysis and document preparation	3 days
Phase 5	Testing and demo video creation	3 days
Final Submission	Upload to GitHub and Smart Internz	1 day

Conclusion

The Project Planning Phase provides a structured roadmap for the successful execution of the CRM Application for Jewellery Management. With proper planning, defined roles, and clear timelines, the project will be implemented effectively, ensuring timely completion and a high-quality final product.