Project Planning Phase

Project Planning Template (Product Backlog, Sprint Planning, Stories, Story points)

Date	06 NOV 2025
Team ID	NM2025TMID07115
Project Name	CRM Application for Jewel Management - (Developer)
Maximum Marks	5 Marks

Foundation & Customer Management

This phase focuses on setting up the core CRM structure and managing customer-related data.

Key Activities:

- Configure Salesforce environment and user profiles.
- Import and categorize customer data (new, returning, VIP, corporate).
- Define lead and contact management workflows.
- Establish communication logs, reminders, and follow-ups.

Outcome:

A complete customer database with structured communication pathways to enhance customer engagement.

Customer Enhancement & Inventory Setup

This phase refines customer experience and prepares product catalogs.

Key Activities:

- Enable loyalty programs, preferred customer tagging, and purchase history views.
- Create jewelry product categories (Gold, Silver, Diamonds, Custom Designs).
- Define SKU codes, weight details, purity levels, style descriptions, and images.
- Set reorder alerts to avoid stock-outs.

Outcome:

Customers receive personalized service and the inventory becomes searchable, organized, and accurate.

Inventory & POS Integration

This phase syncs CRM inventory with the store POS for real-time stock accuracy.

Key Activities:

- Integrate POS sales data with CRM product stock levels.
- Automate stock update after every sale or product return.
- Provide store staff with real-time visibility to stock availability.
- Configure barcode/QR-based product scanning.

Outcome:

Eliminates mismatch between physical and digital inventory and supports smooth billing operations.

Sales Pipeline & Opportunities

This phase streamlines the sales journey from inquiry to purchase.

Key Activities:

- Define lead stages (Inquiry → Interested → Negotiation → Closed).
- Track follow-ups, quotations, showroom visits, and product trials.
- Enable alerts for hot leads and pending conversions.

Outcome:

Improved sales forecasting, better lead nurturing, and faster deal closure.

Commission & Custom Orders

This phase supports custom jewelry design workflows and salesperson commissions.

Key Activities:

- Configure custom order forms capturing design, materials, size, and due date.
- Automate workflow for internal designers and goldsmith workshops.

- Set commission rules based on product category, sale value, and employee role.

Outcome:

Transparent processing of custom orders and fair commission allocation.

Pricing, Payments & Order Management

This phase ensures seamless handling of invoicing and financial transactions.

Key Activities:

- Enable dynamic pricing based on gold rate fluctuations.
- Configure installment, partial payment, and hold order options.
- Integrate digital wallets, UPI, card transactions, and gold exchange.
- Generate invoices and delivery slips automatically.

Outcome:

Faster checkout experiences and accurate billing with flexible payment options.

Repair Management & Security

This phase manages jewelry repair workflows and ensures data and asset protection.

Key Activities:

- Create repair intake forms noting weight, defects, stones, and expected completion date.
- Enable tracking of jewelry while under repair with accountability checkpoints.
- Apply permission-based access to inventory, orders, and customer data.
- Enable audit logs and fraud prevention measures.

Outcome:

Secure repair operations with full transparency and trust-building between customer and store.

Analytics, Reporting & Data Protection

This phase focuses on business insights and system compliance.

Key Activities:

- Create dashboards for sales trends, customer behavior, and employee performance.
- Generate ABC product analysis, stock turnover ratio, and profit margin reports.
- Implement data backups, encryption, and GDPR/IT Act–aligned security measures.

Product Backlog, Sprint Schedule, and Estimation (4 Marks)

Sprint	Functional Requirement (Epic)	User Story Number	Story Points
Sprint 1	Foundation & Customer Management	USN-1	3
Sprint 2	Customer Enhancement & Inventory Setup	USN-2	3
Sprint 3	Inventory & POS Integration	USN-3	2
Sprint 4	Sales Pipeline & Opportunities	USN-4	2
Sprint 5	Commission & Custom Orders	USN-5	3
Sprint 6	Pricing, Payments & Order Management	USN-6	3
Sprint 7	Repair Management & Security	USN-7	3
Sprint 8	Analytics, Reporting & Data Protection	USN-8	4