

# IDEATION PHASE

## Definethe Problem Statements

Date	1 November 2025
Team ID	NM2025TMID08998
Project Name	CRM Application for Jewel Management
Maximum Marks	4 Marks

### Customer Problem Statement Template:

Jewelry merchants and producers frequently encounter obstacles in controlling stock, monitoring transactions, and preserving precise documentation of numerous products spanning various classifications including gold items, silver pieces, diamond products, and precious stones. Hand-operated frameworks or elementary data sheets demonstrate inefficiency, susceptibility to manual mistakes, and inability to deliver instant insight into inventory and client details.

These obstacles result in inventory inconsistencies, postponed purchase completion, insufficient customer understanding, and financial losses. A CRM-driven Jewel Management Solution is necessary to optimize inventory functions, mechanize processes, and consolidate client information for enhanced sales prediction and strategic planning.

Through creating this Salesforce-driven platform, jewelry enterprises can guarantee instant inventory monitoring, mechanized alerts, and strengthened customer interaction — ultimately elevating productivity and financial performance.

### Jewel Management CRM: Problem & Solution Analysis



#### PROBLEM Discrepancy

#### Inventory Discrepancy

##### DESCRIPTION:

Manual records are inconsistent and delayed, leading to errors in stock availability and missed sales opportunities

##### SOLUTION:

Implement Real-Time inventory using custom Salesforce objects and Automated Stock Updates after every transaction



#### PROBLEM Insight

#### Poor Customer Insight

##### DESCRIPTION:

Absence of an integrated CRM system forces data compilation manually, which is time-consuming and hinders personalized offers

##### SOLUTION:

Develop an integrated CRM Module to centralize customer data, track purchase history and enable personalized communication and follow-ups

**Example:**

Problem Statement (PS)	I am	I'm trying to	But	Because	Which makes me feel
PS-1	A Jewellery Store Owner	Manage stock levels efficiently	I can't track real-time inventory	manual records are inconsistent and delayed	frustrated and uncertain about stock accuracy
PS-2	A Sales Executive	Generate customer-specific sales reports	I have to gather data manually	there is no automated CRM system	overwhelmed and less productive

**Problem Statement PS-1:**

As a jewelry shop proprietor, I am attempting to preserve an updated register of accessible inventory, transactions, and fresh merchandise. Nevertheless, I am unable to monitor stock in real-time due to my existing framework depending on hand-operated documentation and data sheets.

This causes inaccuracies in product accessibility, excessive stocking, or lost transaction possibilities. I require a unified platform that mechanically refreshes inventory quantities and delivers precise intelligence throughout all product classifications. This would assist in enhancing sales prediction and guaranteeing efficient purchase handling.

**Problem Statement PS-2:**

As a sales representative, I wish to proficiently oversee client connections, monitor their buying patterns, and deliver tailored promotions. Nevertheless, owing to the lack of an integrated CRM platform, I must assemble information manually from various origins, which consumes time and introduces errors.

This impacts client interaction and postpones correspondence. A Salesforce-driven CRM solution would enable me to mechanize client information processing, configure alerts for subsequent contacts, and transmit email notifications immediately — enhancing productivity and client contentment.