

Ideation Phase
Define the Problem Statements

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| Date | 01 November 2025 |
| Team ID | NM2025TMID01112 |
| Project Name | CRM Application for Jewel Management System |
| Maximum Marks | 2 Marks |

Customer Problem Statement Template

Jewelry business owners and managers face challenges in managing inventory, billing, and customer details using traditional manual methods. Due to the absence of a centralized system, they often experience **data loss, billing errors, and inefficiency** in maintaining sales and stock records. This leads to poor customer service, delayed reporting, and lack of business insights.

They need a **cloud-based CRM system** that can record jewelry item details, maintain customer information, and automate billing and reporting. Such a solution will help businesses streamline operations, reduce human errors, and gain better control over sales and inventory data.

Problem & Solution Table

CRM Application for Jewel Management Systems

| Problem | Description | Solution |
|-----------------------------|--|--|
| Manual keeping | Jewelry businesses use books spreadsheets to track customer and stock, leading to data duplication and errors. | Implement a Salesforce CRM system with automation and calculations to maintain accuracy . |
| Inefficient billing process | Admins may accidentally remove, backup relationships and on errors. | Automatically archive records and data to prevent errors. |
| Inefficient billing process | Billing is handled manually, making slow is-prone. | Automate billing using formula fields triggers that calculate cost instantly. |
| Lack a centralized data | Sales, customers, and inventory data not scattered. | Create custom objects and centralized Lightning App for all business owner. |
| Poor business insights | No visual reports or analytics delays or decision-making. | Develop dynamic reports and dashboards display sales, top-selling items, and customer trends accessible. |

| Problem Statement (PS) | I am (Customer) | I'm trying to | But | Because | Which makes me feel |
|-------------------------------|------------------------|---|--|--|---|
| PS-1 | a Jeweler/Owner | track customer preferences and purchase history | the manual records are incomplete | there's no centralized system to log all | frustrated and inefficient when trying to offer |
| PS-2 | a Sales Associate | generate a bill for a customer quickly | the billing process is manual and time-consuming | I have to manually calculate totals and taxes, leading to delays | stressed and rushed during busy periods |
| PS-3 | a Business Manager | understand which jewelry items are selling best | there are no easy-to-read reports or dashboards | I have to manually go through sales data to find trends | uninformed and unable to make data-driven decisions |
| PS-4 | an Administrator | add new inventory items efficiently | data entry is redundant and error-prone | I have to enter information into multiple spreadsheets, | annoyed and worried about data accuracy |

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| | | | | causing inconsistencies | |
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Problem Statement-Ps 1

As a Jewelry Store Owner, I want to maintain accurate records of all jewelry items and customers, but the current manual process often causes duplication and missing data. This makes it difficult to track which items are available or sold, leading to confusion and loss of sales opportunities.

Problem Statement-Ps 2

As a Sales Worker or Manager, I want to generate accurate bills and reports for customers, but manual calculations take time and often contain errors. This slows down the sales process and reduces customer satisfaction.