Project planning

Project Planning Template

Date	2 Nov 2025
Team ID	NM2025TMID00579
Project Name	CRM Application for Jewel Management System
Maximum Marks	5 Marks

Project Planning Template

A Project Planning Template for a Jewel Management System (JMS) is crucial for organizing tasks, assigning responsibilities, and tracking progress

Phase	Workstream	Task / Deliverable	Estimated Duration	Owner / Responsible Team	Completion Status
Phase 1: Discovery & Planning	**Project Kick-off**	Finalize Scope, Objectives, and Success Metrics	1 Week	Project Manager, Key Stakeholders	
	Requirements Gathering	Document detailed functional and non-functional requiremen	3 Weeks	Business Analyst, Subject Matter Experts (SMEs)	

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		ts (Inventory, Sales, CRM, Repairs)			
	Architecture Design	Design the Data Model (e.g., Inventory Object, Repair Object), system architecture, and integration points.	2 Weeks	Solution Architect	
	Tool Selection	Finalize platform choice (e.g., Salesforce, dedicated ERP, or custom solution).	1 Week	Project Manager, Technical Lead	

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Phase 2: Build & Configuration	System Setup	Configure the base system environment and security profiles.	1 Week	Technical Team	
	Inventory Module Build	Create custom fields for Carat, Metal Purity, Certification IDs, and Location Tracking.	3 Weeks	Developer / Configurator	
	Sales & Pricing Setup	Implement dynamic pricing rules (based on live metal rates) and configure the Point of	3 Weeks	Developer / Configurator	

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		Sale (POS) flow.			
	CRM & Service Build	Configure Customer Profiles, Purchase History tracking, and the Repair/Custom Order workflow.	2 Weeks	Developer / Configurator	
	Integrations	Build API integrations with Accounting /ERP system and E-commerce platform.	4 Weeks	Integration Team	
Phase 3: Data Migration & Testing	Data Preparation	Cleanse, map, and standardize existing	3 Weeks	Data Migration Team,	

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		inventory and customer data.		Inventory Manager	
	Data Migration	Load cleansed data into the new JMS environment.	1 Week	Data Migration Team	
	Unit Testing	Individual component testing (e.g., verifying a new inventory item can be created correctly).	2 Weeks	Development Team	
	User Acceptance Testing (UAT)	Business users test critical end-to-end	3 Weeks	Business Users (UAT Team)	

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		scenarios (e.g., Sale with a Trade-in, Repair Workflow).			
	Security Audit	Conduct security and performance testing on the live environment.	1 Week	QA/Security Team	
Phase 4: Deployment & Training	**Training Documentation**	Create user manuals and quick reference guides for all modules.	2 Weeks	Business Analyst, Trainers	
	User Training	Conduct role-specific training	1 Week	Training Team	

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		sessions for Sales, Inventory, and Service staff.			
	Final Go-Live Checklist	Complete all final checks, data reconciliation, and sign-off.	1 Day	Project Manager, Key Stakeholders	
	System Go-Live	Launch the JMS and transition all operations to the new system.	N/A	Project Team	
Phase 5: Post-Launch Support	**Hypercare Period**	Dedicated support for the first 2-4 weeks post-	4 Weeks	Technical Support Team	

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		launch to address immediate issues.			
	Project Review	Conduct a final review to assess project success against initial goals and document lessons learned.	1 Week	Project Manager, Stakeholders	