

Ideation Phase

Define the Problem Statements

Date	27 OCT 2025
Team ID	NM2025TMID01965
Project Name	CRM Application for Jewel Management
Maximum Marks	2 Marks

Customer Problem Statement Template:

Jewellery store owners and managers face significant challenges in managing their inventory, customer interactions, and sales records efficiently. Manual tracking often results in data inaccuracy, stock mismatches, and delayed order processing.

Customers' preferences and purchase histories are not properly maintained, making personalized sales and marketing efforts difficult. The absence of automation and analytical tools also limits real-time decision-making and business insights.

They need a CRM-based Jewellery Inventory Management System that enables smooth integration of inventory control, sales tracking, and customer relationship management in one platform. Such a solution will ensure accurate records, seamless sales operations, timely communication, and better business intelligence using Salesforce.

Example:

Problem Statement (PS)	I am (Customer)	I'm trying to	But	Because	Which makes me feel
PS-1	Jewellery Store Manager	Manage daily sales and track inventory	Data is scattered across multiple spreadsheets	The system lacks centralized control for sales and stock updates	Confused and frustrated
PS-2	Sales Executive	Maintain accurate customer follow-ups	Customer details and purchase history are not easily accessible	There's no integrated CRM tool for managing leads and transactions	Inefficient and demotivated

Problem Statement PS-1:

As a Jewellery Store Manager, I am trying to manage sales, inventory, and customer records effectively, but the process becomes difficult because data is stored manually in multiple files. This limitation makes me feel frustrated and unproductive, as I cannot access accurate stock information or monitor real-time sales. It leads to errors in billing and poor customer service, especially during busy seasons.

I need a Salesforce-based CRM system that centralizes all records, tracks jewellery inventory, and automates updates to improve efficiency.

Problem Statement PS–2:

As a **Sales Executive**, I want to **record customer preferences and send timely offers**, but the current process is slow and manual.
The absence of an automated CRM workflow causes **missed opportunities and delayed communication** with customers.
This makes me feel **demotivated**, as it directly affects my performance and customer satisfaction.
A CRM application with **flows, email alerts, and dashboards** would help maintain consistent customer engagement and enhance sales performance.