PROJECT PLANNING

Date	23 october 2025
Team ID	NM2025TMID02837
Project Name	Crm Application for Jewel Management
Maximum Marks	5 Marks

Introduction :

The primary goal for this project is to develop a highly specialized **Jewel Management CRM application** engineered to enhance customer engagement and streamline complex operational workflows unique to the jewelry industry, whether for a retail store, manufacturer, or wholesaler. The system's core function is to centralize and optimize customer relationship management, moving beyond generic sales tracking to incorporate industry-specific data points such as ring sizes, metal preferences, and detailed GIA/IGI certifications, providing a true **360-degree view** of the client. By integrating real-time with inventory and potentially ERP systems, the CRM will allow sales teams to accurately generate quotes, manage temporary stock reservations for high-value items, and forecast demand effectively..

Product Backlog :

The **product backlog** for this project includes several user stories that define the system's core functionalities. High-priority items include allowing sales representatives to add and manage customer profiles for tracking purchase history, enabling managers to view dashboards that display sales and lead performance, and providing administrators with the ability to manage jewelry inventory to prevent stock shortages. Other features include customer service representatives logging complaints and resolutions, marketing users segmenting customers based on buying patterns, and accountants generating automated invoices from order data.

Sprint Schedule :

The project is divided into short, iterative sprints of one to two weeks. Each sprint focuses on a specific module of the system to ensure incremental development, continuous feedback, and quality improvement throughout the process.

Sprint 1: Setup of the Salesforce environment and creation of Customer and Product modules.
Sprint 2: Development of Lead and Opportunity Management features.
Sprint 3: Implementation of Inventory and Order Management modules.
Sprint 4: Creation of Reports, Dashboards, and Role-Based Access Control.
Sprint 5: Integration with E-commerce systems, final testing, and deployment.

At the end of each sprint, progress will be reviewed, and necessary adjustments will be made based on testing results and stakeholder feedback to ensure the final CRM system meets all business requirements.

.**Effort Estimation**

The total estimated effort for developing the CRM Application for Jewel Management is approximately **160 hours**. The project involves several key phases, including requirement analysis and design, Salesforce environment setup, module development, testing, and deployment. Around **20 hours** are allocated for requirement gathering and design, while **10 hours** are estimated for environment setup. Development of customer, product, lead, opportunity, inventory, and order modules will require about **60 hours** in total. Report and dashboard creation, along with role-based security setup, will take approximately **25 hours**, followed by **20 hours** for integration with the e-commerce system. The remaining **25 hours** are distributed among testing, user training, and documentation. Overall, the effort is spread across the Salesforce Developer, Administrator, Business Analyst, QA Engineer, and Integration Specialist roles to ensure efficient project completion within the planned timeline.

Conclusion

The **CRM Application for Jewel Management** provides a comprehensive solution for managing customer relationships, sales processes, and jewelry inventory within a single Salesforce-based platform. By automating key business operations such as lead tracking, order management, and reporting, the system enhances efficiency and supports data-driven decision-making. The iterative sprint-based development approach ensures that each module is thoroughly tested and refined based on stakeholder feedback. Overall, the project successfully meets its objectives of improving customer engagement, streamlining internal workflows, and delivering valuable insights for business growth. This CRM system lays a strong foundation for future scalability and integration with advanced tools, enabling the jewelry business to maintain a competitive edge in the digital marketplace.