Phase 2: Project Planning Phase

Project Title: CRM Application for Jewellery Management

Introduction

Project planning is an **CRM Application for Jewellery Management** aims to streamline customer relationship management, inventory tracking, and sales processes for jewellery businesses. This application is designed to help jewellery stores maintain detailed records of customers, sales transactions, product details, and service history in a single, centralized platform. It enhances operational efficiency and improves customer satisfaction through personalized engagement and automation.

Project Overview

In traditional jewellery stores, managing customer data, purchase records, and product inventory is often done manually, which leads to inefficiency, errors, and data loss. The proposed CRM system overcomes these challenges by offering a digital platform that records every transaction, customer interaction, and product detail in real time. It allows businesses to maintain detailed profiles of customers, track purchase histories, and analyze buying patterns to improve marketing and service strategies.

Project Goals

1. Fully functional CRM application (web or desktop).

2. Customer and product database with CRUD operations.

3. Interactive dashboard with charts and analytics.

4. Report generation module (PDF/Excel exports).

5. Authentication and role-based access control.

6. System documentation and user manual.

Tools and Technologies Used

- **Salesforce Developer Edition:** For creating and testing the CRM application.

- **Objects and Relationships:** To store jewellery, customer, and order details.

- **Flows and Automation Tools:** For automating tasks like notifications and data updates.

- **Dashboards and Reports:** To analyze performance and monitor sales.

- **SmartInternz Portal:** To track progress and submit project deliverables.

- **GitHub:** For maintaining project documentation and video links.

Team Structure and Roles

A clear division of roles helps in smooth progress and accountability. The roles for this project include:

- **Project Lead:** Oversees the entire project and ensures all phases are completed on time.

- **System Analyst:** Designs the system flow and ensures that all functions meet business needs.

- **Document Specialist:** □ Designs and maintains the database structure.

- **Tester:** Tests the CRM functions such as record creation, update, and report generation.

- **Video Presenter:** Records and explains the demo video of the completed project.

Risk Management

- Regularly back up project data in Salesforce and GitHub.

- Divide tasks clearly to avoid confusion.

- Maintain regular communication within the team.

- Test each feature after development to ensure proper functionality.

Monitoring and Evaluation

Project progress will be monitored through:

- Regular review of milestones in SmartInternz.

- Tracking completion of each phase document.

- Evaluating the performance of the CRM features such as workflows, automation, and reports.

Project Timeline

The project is divided into specific tasks with expected completion periods:

Phase	Task Description	Duration
Phase 1	Ideation and topic selection	2 days
Phase 2	Planning and team setup	2 days
Phase 3	Design and development in Salesforce	5 days
Phase 4	Requirement analysis and document preparation	3 days
Phase 5	Testing and demo video creation	3 days
Final Submission	Upload to GitHub and Smart Internz	1 day

Conclusion

The **CRM Application for Jewellery Management** will significantly improve operational efficiency and customer engagement in jewellery businesses. With automated data handling, secure storage, and insightful analytics, the system ensures smooth day-to-day management and long-term business growth. The project's structured planning and systematic development approach ensure timely delivery and performance