

Ideation Phase

Brainstorming – Idea Generation – Prioritization Template

CRM Jewel Management (Developer) – Concept Overview

This guided project focuses on building a **Customer Relationship Management (CRM) system** for the **Jewellery industry** using Salesforce.

The goal is to **streamline jewellery business operations** such as customer management, item tracking, billing automation, and reporting — all within one integrated application.

The idea began with identifying common issues faced by jewellery businesses, such as **manual billing errors, inconsistent customer data, and lack of automated reports**. To address these gaps, our team proposed a Salesforce-based CRM solution that automates customer interactions, manages item pricing, generates bills, and visualizes sales performance through dashboards.

This project ensures **data accuracy, real-time insights, and process efficiency** for jewellery sellers. The workflow also includes automation using **record-triggered flows** for billing and **dynamic dashboards** for management decisions.

Step 1: Team Gathering, Collaboration, and Problem Statement Selection

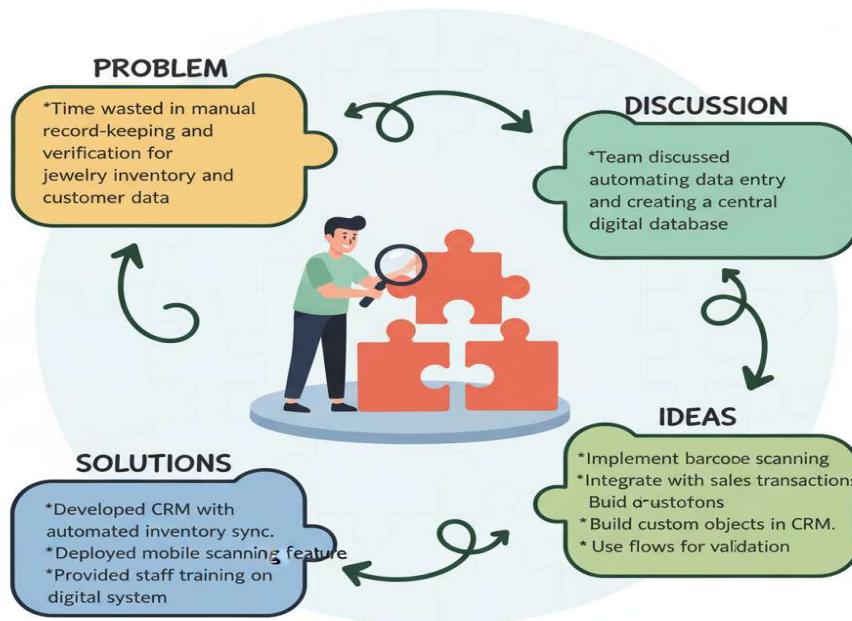
During the ideation session, the team collaborated to identify a **real-world problem statement** suitable for a Salesforce developer project.

After discussion, the chosen topic was:

“Develop a CRM-based Jewel Management System to automate jewelry sales, billing, and customer tracking using Salesforce.”

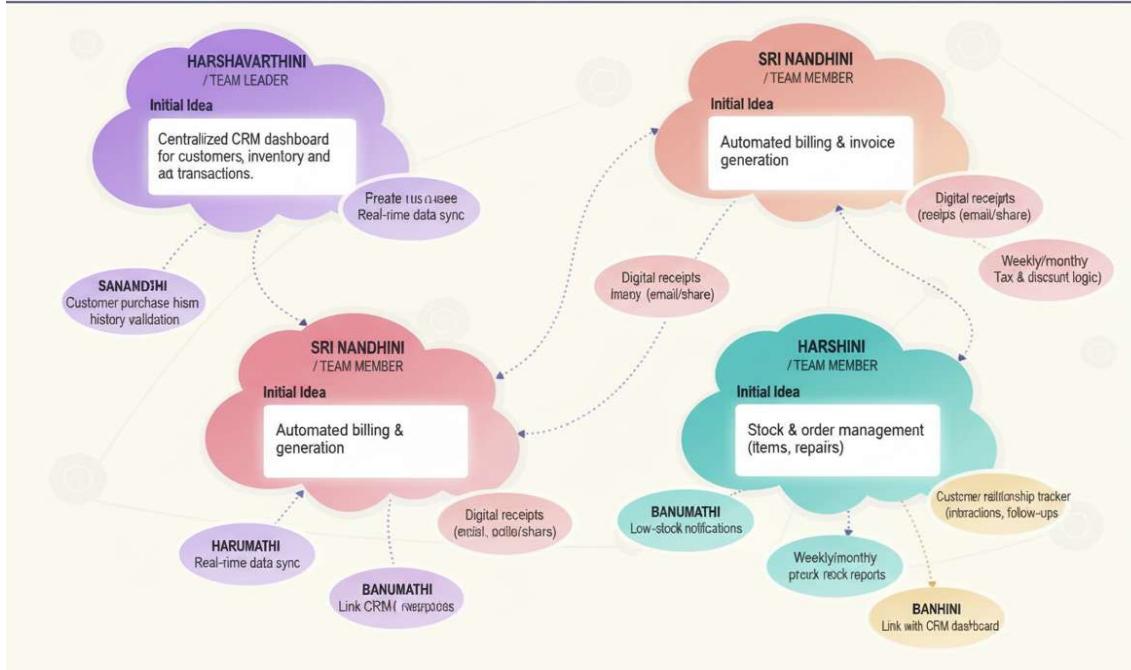
This idea focuses on improving how jewellery businesses handle sales operations, customer engagement, and billing accuracy.

Mind Mapping for PROBLEM SOLVING



Step 2: Brainstorm, Idea Listing, and Grouping

JEWEL MANAGEMENT CRM – IDEA LISTING



Brainstorm:

Team members proposed multiple ideas on how CRM can simplify jewelry operations — including modules for **Jewel Customer, Item, Price, Billing, and Reports**.

Idea Listing:

All ideas were documented systematically — covering customer record automation, email flow setup, and data visualization through dashboards.

Grouping:

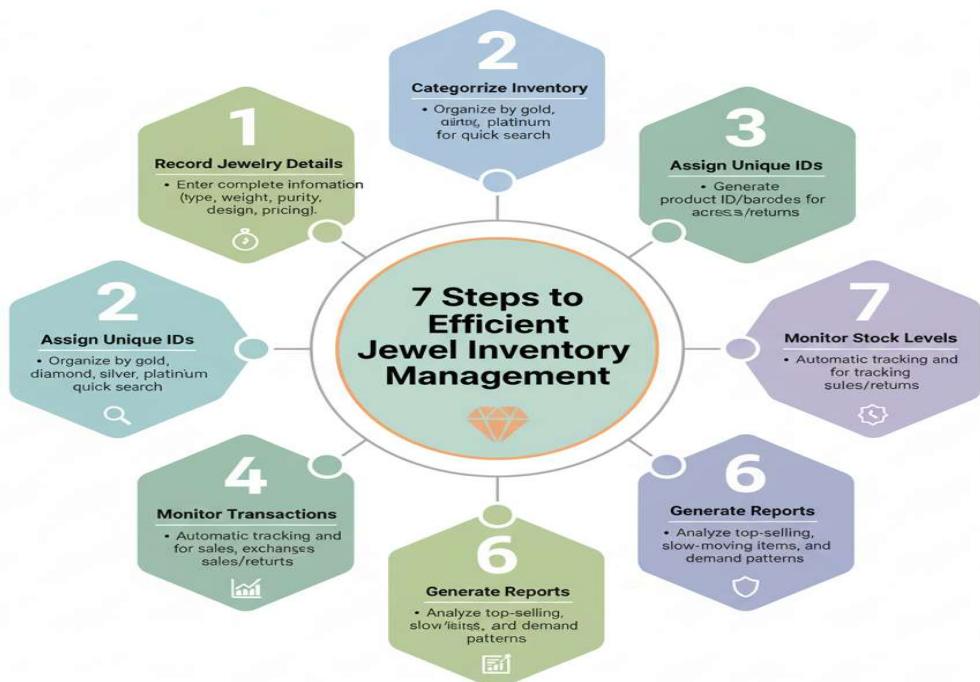
Similar ideas were grouped under functional areas like:

- Customer & Item Management
- Billing & Price Tracking
- Flow Automation & Email Notification
- Dashboard & Report Generation

Action Planning:

The most impactful ideas were selected for implementation with assigned responsibilities for design, testing, and validation phases.

Step 3: Idea Prioritization



Idea Prioritization:

The team prioritized features that provide the **maximum business value** and **simplify user experience**.

Top priorities included:

1. **Automated Billing System** using Salesforce Flow.
2. **Integrated Reports & Dashboards** for revenue tracking.
3. **Customer Data Management** with accurate linkage between objects.

This prioritization ensures the system is **efficient, scalable, and aligned** with real-world jewellery business workflows.

By visualizing ideas through flow diagrams and dashboards, the project roadmap became clear — allowing structured development and faster execution.