Ideation Phase

Define the Problem Statements

Customer Problem Statement Template:

Jewellery businesses face difficulties managing customer, item, and billing records efficiently.

Manual data entry and disconnected processes often lead to **billing mismatches**, **inventory tracking errors**, and **delayed updates** in customer information.
Without an integrated system, employees spend extra time managing repetitive tasks, and managers lack real-time insights into **sales performance** and **stock movement**.

They need a **centralized CRM system** that automates billing, manages jewellery items, and generates instant reports. This solution ensures accuracy, data consistency, and better customer relationship management improving operational productivity and business growth.

Jewel Management CRM - Problem & Solution Analysis

Problem	Description	Solution
Manual Inventory Tracking	Jewel shops often record stock stoik maually, which leadls which leadsls ee rording jewelrrg jewelry details (type, purity, aortrcbets counts price and updating stock levels in-retime.	
Lack of Customer Purchase History	Without digital tracking in srentor managent by dificully loyals identify loyal customes or werity, and price) and deating evels in rerteme.	
Lack of Customer History	The CRM stores complete customer profiles and and purchase histories, enabling personslized offers and relationship-based marketing.	
Inficient Order and Billing Management	The CRM billing and order tracking can lead ts bad to calculation to mistakes, missing receipts, and bie maintaning digital records.	
Difficulty in Handling Returns or Exchanges	The CRM integrates automated ordlen and billing, generating accurate accurate invotnilde s imstanly and to fraud il in manual systems.	
Lack of Data Security Backup	The CRM ensures every return iser exchange jewellry items is inventory autentry autmaticaly valleiates and validdes aguanst the product's uroduct's unique ID or barcode.	
Lack of Data Security and Backup	The CRM implements secure, role-based access with automatic data aaskups tha bascl Sackups and encrnyption to protect sensitive business information.	

Example :

Problem Statement (PS)	I am	I'm trying to	But	Because	Which makes me feel
PS-1	A Jewellery Store Manager	Manage all customer and billing records in one place	The current process is manual and disconnected	Each transaction and item record is maintained separately	Frustrated and overwhelmed due to lack of automation
PS-2	A Sales Executive	Generate accurate bills and reports quickly	Errors occur while entering customer and item details	There is no linked database between items, customers, and prices	Stressed and uncertain about data accuracy
PS-3	A Business Owner	Track sales and performance trends	Reports are not auto-generated or visualized	The system does not provide real-time dashboards	Disappointed because decision-making becomes slow and unclear

Problem Statement PS 1:

As a **Jewellery Store Manager**, I am trying to manage all customer and billing details in one place.
However, the process is manual and time-consuming because customer records, price lists, and billing data are stored separately.
This causes **inconsistencies in sales tracking** and **billing errors** during transactions, making me feel frustrated and inefficient.
I need an automated system that links all jewellery operations into a single

CRM platform to **ensure accuracy**, **save time**, and **improve customer satisfaction**.

Problem Statement PS 2:

As a **Sales Executive**, I want to generate bills accurately and instantly after each jewellery sale.
But due to disconnected item and price records, I often need to recheck or manually update data, leading to mistakes.
This slows down the billing process and affects the customer experience.
A **Salesforce-based automated billing system** would eliminate manual errors and enhance workflow efficiency.

Problem Statement PS 3:

As a **Business Owner**, I need to view daily sales reports and analyze performance easily.
Currently, I have to collect data manually from multiple sources, which is tedious and error-prone.
This makes it hard to make timely decisions or track business growth effectively.
Having a **real-time dashboard and report generation module** within the CRM would make monitoring fast, visual, and reliable.