

# 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:

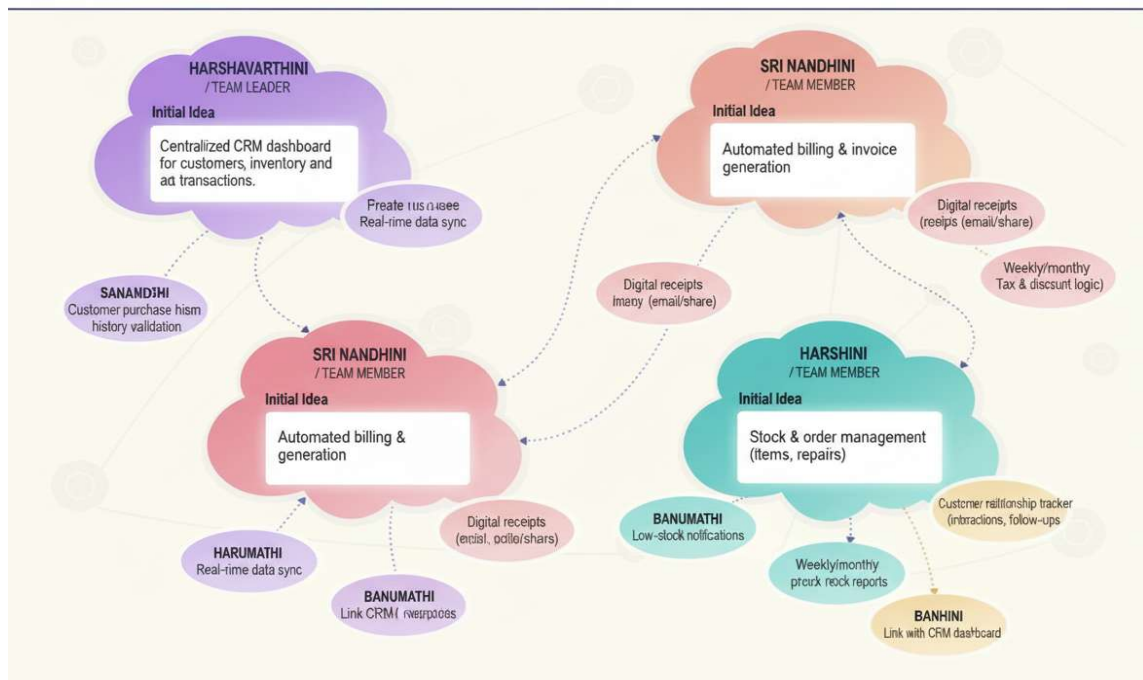
**“Develop a CRM-based Jewel Management System to automate jewelry sales, billing, and customer tracking using Salesforce.”**

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

The diagram illustrates the Design Thinking process through five interconnected stages arranged in a circle around a central figure. The central figure is a man in a green shirt and dark pants, standing on a blue circular platform and holding a magnifying glass over a large red puzzle piece. The puzzle pieces are arranged in a cross shape, with the central piece being a white cross. The stages are represented by colored speech bubbles with curved arrows indicating a clockwise flow between them.

- PROBLEM** (Orange bubble):
  - \*Time wasted in manual record-keeping and verification for jewelry inventory and customer data
- DISCUSSION** (Green bubble):
  - \*Team discussed automating data entry and creating a central digital database
- IDEAS** (Light green bubble):
  - \*Implement barcode scanning
  - \*Integrate with sales transactions
  - \*Build custom objects in CRM.
  - \*Use flows for validation
- SOLUTIONS** (Blue bubble):
  - \*Developed CRM with automated inventory sync.
  - \*Deployed mobile scanning feature
  - \*Provided staff training on digital system

## 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.

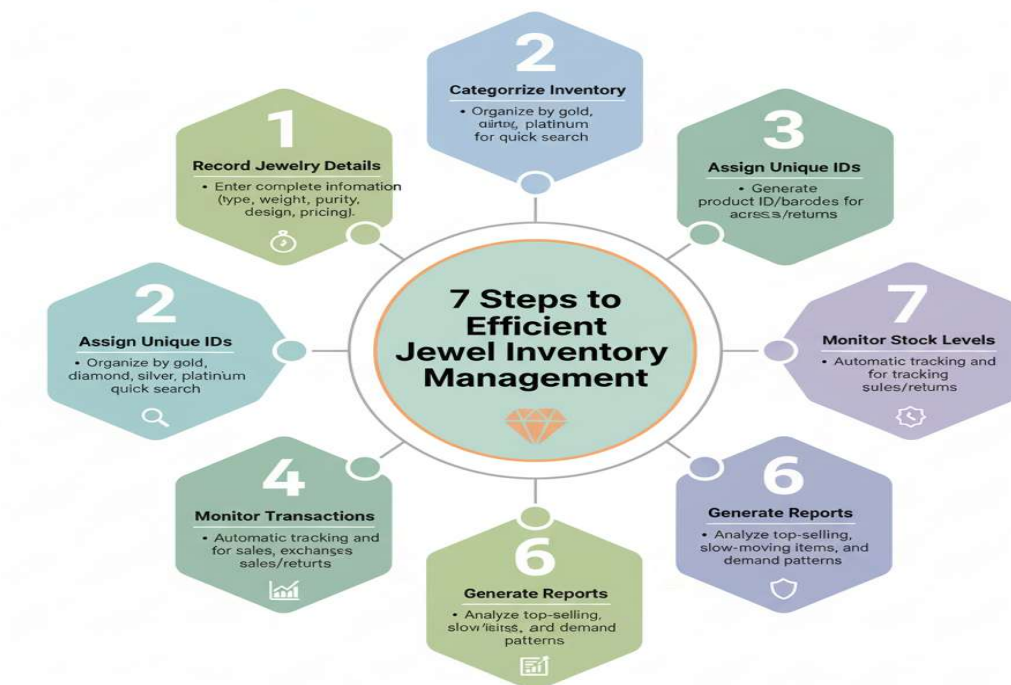
**Grouping:**

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.