PROJECT PLANNING

Date	2 November 2025
Team ID	NM2025TMID00606
Project Name	CRM Application for Jewel Management - (Developer)
Maximum Marks	5 Marks

Introduction

The Project Planning phase lays the foundation for developing the CRM Application for Jewel Management using Salesforce. It defines the project's objectives, scope, and workflow structure while aligning team efforts with available resources and deadlines.

This phase ensures that all stakeholders clearly understand project deliverables, responsibilities, and expected results. Following an Agile methodology, the project is divided into iterative sprints that promote continuous improvement, frequent testing, and stakeholder feedback. This approach enhances collaboration, transparency, and adaptability throughout the CRM development lifecycle.

Product Backlog

The Product Backlog contains all the essential features required to build the CRM Application for Jewel Management. It serves as a prioritized list guiding the development process in alignment with business objectives.

Key backlog items include:

- Customer Management (profile creation and loyalty tracking)

- Jewelry Inventory and Stock Management

- Order and Appointment Booking System

- Billing, Payments, and Feedback Management

- Dashboard and Analytics for sales performance

Each feature is broken into smaller, manageable user stories in Salesforce to ensure systematic implementation and testing. Regular backlog refinement ensures that high-priority features like sales tracking and billing are developed first, followed by secondary modules such as supplier management and employee performance tracking.

Sprint Schedule

The project is divided into four iterative sprints, each lasting one to two weeks, focusing on specific CRM modules for steady progress and ongoing evaluation.

Sprint 1: Customer and Inventory Management Modules

Sprint 2: Order Booking and Appointment Scheduling

Sprint 3: Billing Automation and Feedback Collection

Sprint 4: Dashboard Creation, Testing, and Final Deployment

At the end of each sprint, the team conducts reviews to assess progress, integrate feedback, and make necessary refinements to meet evolving business needs.

Effort Estimation

- Effort estimation is done using the story point method, where each backlog item is assigned a complexity score based on development effort, time, and resources.
- Simple configurations such as object and field creation are assigned fewer points.
- Complex automation, workflows, and validation rules are given higher estimates.
- This approach ensures efficient time management, workload balance, and risk mitigation, enabling realistic scheduling and effective sprint planning for all modules.

Conclusion

Through structured backlog management, sprint planning, and precise effort estimation, the Project Planning phase ensures the smooth and efficient execution of the CRM Application for Jewel Management.

This organized approach enables faster delivery, higher-quality outputs, and adaptability to dynamic requirements within the Salesforce development ecosystem.