Ideation Phase

Brainstorm & Idea Prioritization

Date	01 NOV 2025
Team ID	NM2025TMID04631
Title	CRM application for jewel Management
Maximum Marks	4 marks

**CRM Application for Jewel Management – (Developer) Template:**

This guided project focuses on developing a CRM-based Jewel Management Application that simplifies customer handling, billing, pricing, and inventory tracking within the jewelry business. The system is designed to help store owners and staff manage Jewel Customers, Items, Customer Orders, Prices, and Billing records efficiently — all within a unified Salesforce CRM platform. The goal is to automate daily operations such as recording customer details, tracking items and purity, calculating billing amounts, and generating reports and dashboards for business insights. This ensures better decision-making, improved customer experience, and reduced manual errors. The project also introduces key CRM concepts such as object relationships, record-triggered flows, automation rules, and dashboards. Each of these enhances productivity while maintaining data integrity across modules.

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

Reference: https://www.mural.co/templates/brainstorm-and-idea-prioritization

 The team collaborated to identify common challenges faced by jewellery stores in managing customers, tracking items, and generating reports. Through multiple brainstorming sessions, the group concluded that a centralized CRM application could solve these problems by integrating all operations into one system. After analyzing various options, the

team selected "CRM Application for Jewel Management" as the final project due to its practical business relevance and clear scope for Salesforce automation implementation.
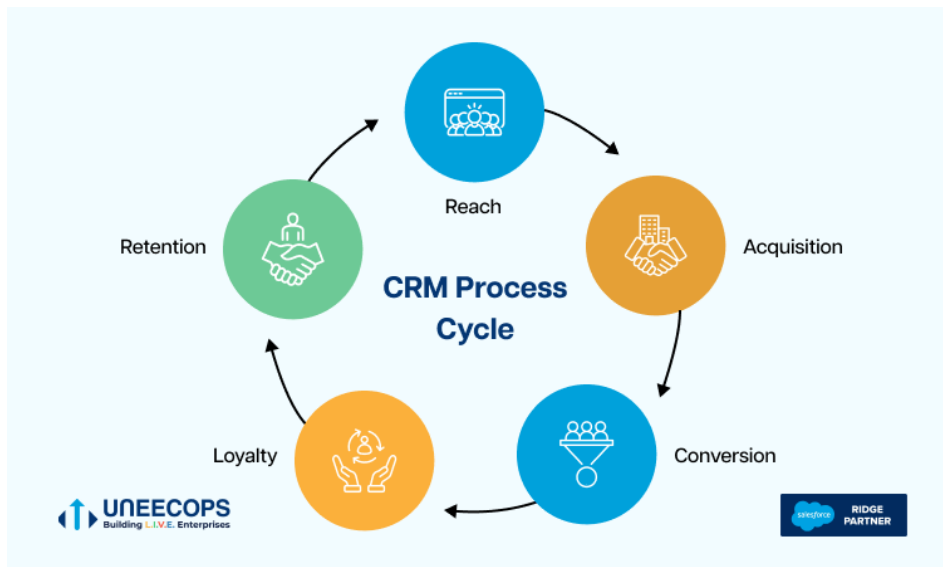
Step-2: Brainstorm, Idea Listing, and Grouping

Brainstorm: Team members openly shared ideas around features such as inventory tracking, billing automation, customer follow-up, and reporting. Each member contributed unique perspectives based on real-world jewellery business workflows. **Idea Listing:** All proposed ideas were listed, including: • Managing Jewel Customers with complete contact and address details. • Tracking Items with purity, weight, and type. • Creating Customer Orders linked to Billing and Items. • Generating automatic dashboards for sales performance. • Using record-triggered flows for automating billing and notifications.

Grouping: Ideas were grouped under main CRM modules: 1. Customer Management 2.

Inventory & Item Management 3. Order & Billing Automation 4. Analytics & Reporting

Action Planning: Each module was assigned to specific team members for development and testing. Timelines were planned for designing custom objects, creating relationships, and setting up automation flows.

Step-3: Idea Prioritization

Idea Prioritization: The prioritization focused on delivering core business functionality first, followed by advanced analytics: 1. Customer Module – To be implemented first for data foundation. 2. Item Module – To track stock and item details. 3. Billing & Order Modules – To automate business transactions. 4. Reports & Dashboards – To visualize business performance and trends. This prioritization ensured a systematic approach — starting with basic record creation and gradually building automation and insights. By dividing work into clear components, the team enhanced focus, efficiency, and accountability. Visual tools like ER diagrams and flowcharts were planned to represent relationships and automation clearly. Overall, this ideation phase established a strong foundation for the project — aligning goals, features, and responsibilities for successful execution.