

## Ideation Phase

### Empathize & Discover

Date	01 NOV 2025
Team ID	NM2025TMID04631
Title	CRM Application For Jewel Management
Maximum Marks	10 Marks

#### 1. Empathize Phase

The goal of empathizing is to **understand users' needs, pain points, and goals**. For a jewel management CRM, users could include jewellers, sales staff, inventory managers, and customers.

#### Objectives:

- Understand the workflow of jewellers and staff.
- Identify pain points in managing inventory, customer relationships, and billing.
- Gather insights about customer expectations and data management.

#### Methods/Activities:

##### 1. Interviews:

- Talk to jewellers about challenges in customer tracking, orders, and billing.
- Ask staff about difficulties in stock management, pricing updates, or alerts for pending orders.

##### 2. Surveys/Questionnaires:

- Send structured questions to store managers about frequency of stock-outs, customer follow-ups, and reporting requirements.

##### 3. Observation / Shadowing:

- Observe how staff currently handle customer interactions, billing, and inventory.

- Note any repetitive manual tasks that could be automated.

#### 4. Persona Creation:

- Create personas like:
  - *Jewel Store Owner* – needs quick insights on sales trends.
  - *Sales Executive* – needs easy access to customer history and follow-ups.
  - *Inventory Manager* – wants accurate stock levels and reorder alerts.

#### Insights Expected:

- Delays in customer follow-ups due to lack of reminders.
  - Difficulty tracking high-value items and their billing status.
  - Manual record keeping causing errors in inventory and pricing.
  - Customers often want personalized offers and notifications.
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## 2. Discover Phase

The discover phase is about **defining specific problems and opportunities** based on insights from Empathize.

#### Objectives:

- Identify pain points that a CRM can solve.
- Map out opportunities for automation and improved user experience.

#### Activities:

##### 1. Affinity Mapping:

- Group insights from interviews and observations into categories (Customer Management, Inventory, Billing, Reporting, Notifications).

##### 2. Customer Journey Mapping:

- Visualize the steps from customer inquiry → purchase → billing → follow-up.
- Identify friction points or gaps in the journey.

### **3. Problem Statement Formulation:**

- Convert insights into clear problem statements, e.g.:
  - “Sales executives spend too much time manually tracking customer orders, leading to missed follow-ups.”
  - “Inventory managers lack real-time alerts for low stock, causing delayed restocking.”

### **4. Opportunity Areas:**

- Automated customer follow-up reminders.
- Real-time inventory tracking with alerts.
- Integrated billing and pricing management.
- Personalized customer notifications/offers.

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### **Deliverables for Developer's Ideation Phase:**

- 1. User Personas** – for each key role.
- 2. Empathy Map** – documenting what users say, think, do, and feel.
- 3. Problem Statements** – focused on actionable CRM features.
- 4. Opportunity List** – potential features to prototype in later stages.