Project Planning Phase

Project Planning

Date	01 NOV 2025
Team ID	NM2025TMID04631
Title	CRM Application For Jewel Customer
Maximum Marks	4 Marks

1. Project Overview

- **Project Name:** CRM Application for Jewel Management

- **Objective:** Develop a centralized CRM system to manage customer relationships, orders, inventory, billing, communication, and reporting for jewellery businesses.

- **Stakeholders:**

  o Jewel Store Owners / Managers

  o Sales Staff

  o Inventory Managers

  o Customers

  o Development & IT Team

2. Project Goals

1. Centralize customer data for better service and engagement.

2. Automate order management and billing workflows.

3. Provide real-time inventory tracking and alerts.

4. Enhance customer communication with notifications and reminders.

5. Generate reports and analytics for business decisions.

3. Project Scope

In-Scope:

- Customer profile management (contact info, purchase history, preferences).

- Order tracking and management module (customized and standard items).

- Billing and payment tracking system.

- Inventory management with stock alerts.

- Communication module (SMS, email, notifications).

- Reporting and analytics dashboards.

Out-of-Scope:

- Manufacturing or design modules for jewelry production.

- Third-party e-commerce integrations (can be added in future phases).

- Physical store hardware integration (POS systems, sensors).

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4. Project Deliverables

Deliverable	Description	Timeline
Requirement Specification	Document detailing functional & technical requirements	Week 1-2
Solution Architecture	High-level system architecture & data flow	Week 2-3
Prototype / UI Design	Initial user interface mockups	Week 3-4
CRM Modules	Customer Management, Orders, Inventory, Billing, Communication	Week 4-10
Integration & Testing	Payment gateway, notifications, reports, data validation	Week 10-12

Deliverable	Description	Timeline
Deployment	Launch on web & mobile platforms	Week 12-13
Training & Documentation	User manuals and training sessions for staff	Week 13-14
Project Closure	Final report and sign-off	Week 14

5. Resource Planning

- **Human Resources:**
  - Project Manager
  - Business Analyst
  - UI/UX Designer
  - Frontend Developers (Web & Mobile)
  - Backend Developers
  - QA / Testing Team
  - Deployment / DevOps Engineer
- **Tools & Technologies:**
  - Database: MySQL / PostgreSQL
  - Backend: Node.js / Django / Java Spring
  - Frontend: React.js / Angular / Mobile SDKs
  - Cloud Hosting: AWS / Azure
  - Notification Services: Twilio, Email APIs
  - Project Management Tools: Jira, Trello, MS Project

6. Project Timeline (High-Level Gantt)

Phase	Duration
Planning & Requirement Gathering	Week 1-2
Design (UI/UX + Architecture)	Week 3-4
Development (CRM Modules)	Week 4-10
Testing & Quality Assurance	Week 10-12
Deployment & Training	Week 12-14
Project Closure	Week 14

7. Risk Management

Risk	Impact	Mitigation
Delay in requirement gathering	Medium	Schedule stakeholder meetings early; document all requirements clearly
Data migration errors	High	Test migration scripts in staging; backup existing data
Integration failures with payment or notification systems	High	Conduct integration testing; use sandbox accounts for external services
User adoption challenges	Medium	Provide training sessions and user manuals; get early feedback
Security breaches	High	Implement role-based access, encryption, and regular audits

8. Success Metrics

- 100% of customer and order data centralized in CRM.

- Reduced order processing time by at least 30%.

- Automated follow-ups and notifications functional for all customers.

- Real-time inventory accuracy > 95%.

- Positive feedback from staff within 1 month of deployment.