

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.

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.