

Project Planning Phase

Project Planning

1. Introduction

The Project Planning Phase establishes a clear roadmap for implementing the Salesforce CRM for Jewel Management project. It defines objectives, scope, timelines, and responsibilities to ensure the project is executed efficiently, within scope, and aligned with business goals. This phase transforms conceptual ideas into a practical action plan for systematic execution.

2. Objectives

- The key objectives of project planning are to:
- Define the scope and deliverables.
- Allocate resources and roles effectively.
- Identify milestones and timelines.
- Mitigate risks through proactive planning.
- Ensure collaboration and timely completion.

3. Scope

The project focuses on developing a Salesforce-based CRM to manage jewelry customers, items, and transactions.

Core inclusions:

- Creation of custom objects and relationships.
- Implementation of automation using Flows, Triggers, and Validation Rules.
- Configuration of roles, profiles, and permissions for data security.
- Reports and dashboards for business insights.

Exclusions: external integrations and custom UI beyond standard Salesforce tools.

4. Project Timeline and Milestones

Phase	Key Activities	Duration
Initiation	Developer Account Setup	1 Day
Object & Field Setup	Create Objects, Fields, Relationships	3 Days
Configuration	Tabs, Layouts, Lightning App	2 Days
Access Control	Profiles, Roles, Users	2 Days
Automation	Validation Rules, Flows, Triggers	3 Days
Reports & Dashboards	Create Analytical Tools	2 Days

Phase	Key Activities	Duration
7. Testing & Submission	Review, Testing, Documentation	3 Days

Total Duration: 16 Days

5. Resources and Responsibilities

- **Platform:** Salesforce Developer Edition
- **Tools:** Flow Builder, Schema Builder, Report Builder
- **Developer:** Configures, tests, and documents the CRM
- **Mentor/Reviewer:** Validates and reviews deliverables

6. Risk and Quality Management

Risks: Misconfigured relationships, automation errors, or delays.

Mitigation: Regular schema validation, sandbox testing, and progress tracking.

Quality is ensured through unit testing, functional validation, and dashboard verification.

7. Communication and Monitoring

- **Updates:** Regular mentor reviews and progress reports.
- **Tracking:** Salesforce logs and milestone reviews.
- **Deliverables:** Project schedule, resource plan, QA report, and documentation.

8. Conclusion

The Project Planning Phase ensures structured development, risk mitigation, and timely delivery of the Salesforce CRM for Jewel Management. With clear goals and an organized schedule, it lays the foundation for a secure, efficient, and scalable CRM solution tailored for the jewelry business.