Ideation Phase

Brainstorming, Idea Generation, and Prioritization

1. Brainstorming

The ideation phase began with a focused brainstorming session to identify key challenges faced by jewelry businesses in managing their customer and inventory operations. The primary goal was to explore how Salesforce CRM could streamline jewelry management by providing a centralized and automated platform.

During the brainstorming process, various aspects of jewelry business operations were discussed, including sales tracking, customer relationship management, order handling, and inventory control. The team analyzed traditional methods used in jewelry stores—such as manual registers and spreadsheets—and identified inefficiencies like data duplication, delayed communication, and lack of sales insights.

From this brainstorming activity, the following problem statements were identified:

Difficulty in maintaining accurate inventory records.

Lack of centralized customer information and purchase history.

Manual and error-prone billing and order processes.

Limited reporting capabilities for business insights.

These insights formed the foundation for conceptualizing a Salesforce-based solution that would address these challenges effectively.

2. Idea Generation

Following the brainstorming session, multiple solution ideas were generated to address the identified business challenges. The focus was on leveraging Salesforce's declarative and programmatic capabilities to develop a scalable, user-friendly CRM application tailored for jewelry management.

Some of the proposed ideas included:

1. Jewelry Inventory Management System – Track jewelry items, stock availability, and pricing.

2. Customer Relationship Management Module – Maintain detailed customer profiles, preferences, and purchase history.

3. Sales and Order Management Automation – Automate order creation, stock updates, and billing processes using Flows and Triggers.

4. Role-Based Access Control – Define roles such as Goldsmith and Worker to ensure appropriate data access and operational hierarchy.

5. Analytical Dashboards and Reports – Provide visual insights into top-selling items, customer trends, and revenue growth.

6. Notification and Alerts System – Send alerts when stock levels fall below a defined threshold or when an order is ready for delivery.

Each idea was evaluated based on its feasibility within Salesforce, its potential impact on operational efficiency, and alignment with the project's learning objectives.

3. Idea Prioritization

To ensure systematic implementation, the generated ideas were prioritized using key criteria such as feasibility, impact, complexity, and business value.

Idea	Feasibility	Impact on Business	Complexity Level	Priority Level
Jewelry Inventory Management	High	High	Medium	1
Customer Relationship Module	High	High	Low	1
Automated Order Processing	Medium	High	Medium	2
Role-Based Security Setup	Medium	Medium	Low	2
Reports and Dashboards	High	High	Medium	3
Notification and Alerts System	Medium	Medium	Medium	3

Based on this prioritization, the project development plan was structured into phases:

Phase 1: Core setup – objects, fields, relationships, and app creation.

Phase 2: Business logic – validation rules, triggers, and flows.

Phase 3: User experience – layouts, record types, and permissions.

Phase 4: Analytics – reports and dashboards.

This prioritization ensured that critical business functionalities were addressed first, followed by enhancements and analytics for better decision-making.

4. Finalized Project Concept

After evaluating and prioritizing the ideas, the final project concept was defined as:

"A Salesforce-based CRM Application for Jewelry Management that centralizes customer data, manages jewelry inventory, automates order processes, and provides insightful business dashboards."

This concept aligns with the objectives of the Naan Mudhalvan Salesforce Developer program by integrating both declarative tools (App Builder, Flow, Validation Rules) and programmatic capabilities (Apex Triggers, Handler Classes) to deliver a comprehensive, real-world business solution.

5. Expected Outcomes

Enhanced efficiency in jewelry inventory management.

Centralized access to customer and sales data.

Automation of repetitive business processes.

Improved visibility into sales and operational performance.

Strengthened understanding of Salesforce CRM customization and automation tools.