Ideation Phase

Empathy Map Canvas and Prioritization Template

1. Empathy Map Canvas

The Empathy Map Canvas is a strategic tool used to understand the emotions, needs, and pain points of the key stakeholders involved in the jewelry business. It enables the project team to view the system from the users' perspective and design a Salesforce CRM application that directly addresses their real-world challenges.

For this project, the primary stakeholder is the Jewelry Store Owner and Staff (Goldsmith, Sales Representatives, and Inventory Managers) who will be using the CRM system daily.

a. User Persona:

Name: Mr. Arjun Mehta

Role: Jewelry Store Owner

Background: Owns a mid-sized jewelry business managing both retail and custom orders.

Goal: To streamline customer management, automate sales tracking, and maintain accurate inventory data within a single system.

Empathy Map Breakdown

Category

Description:

What the User Says   "Managing customer details manually is time-consuming."
"I often lose track of orders and stock levels."
"I need quick reports on daily sales and inventory."

What the User Thinks Thinks that digitization will improve efficiency and profitability.
Feels that automating routine operations can reduce human errors.
Believes that using Salesforce CRM will enhance decision-making.

What the User Does   Keeps track of jewelry items and sales in spreadsheets.
Communicates with customers via phone or in-person visits.
Relies on staff to manually calculate prices and generate bills.

What the User Feels   Feels frustrated by repeated data entry and lack of integration.
Feels uncertain about real-time stock levels.
Feels motivated to adopt technology for better management.

b. User's Pains

- Difficulty in maintaining accurate customer and product records.
- Time wasted in manually generating sales and stock reports.
- Lack of system-driven alerts for low inventory or pending orders.
- Risk of data loss due to manual record keeping.

c. User's Gains

- Centralized database for customers, orders, and inventory.
- Automated stock adjustments after each sale or order.
- Real-time sales insights and inventory visibility through dashboards.
- Role-based access ensuring secure handling of business data.

d. Insights from the Empathy Map

From the empathy mapping exercise, it is evident that jewelry business users seek a simplified, automated, and reliable CRM system. They need a tool that minimizes manual effort, provides instant visibility into inventory and customer transactions, and enhances business productivity.

By understanding these emotions and behaviors, the Salesforce CRM for Jewel Management is designed with user-centric features such as automated Flows, validation rules, dashboards, and intuitive record layouts to make operations seamless.

2. Idea Prioritization Template

After analyzing user needs through the Empathy Map, various solution ideas were generated and prioritized based on feasibility, business impact, and complexity. This ensures that development begins with high-value, achievable goals before addressing more advanced features.

a. Identified Solution Ideas

1. Jewelry Inventory Management
2. Customer Relationship Tracking
3. Automated Order Processing and Stock Adjustment
4. Role-Based Security Configuration
5. Reports and Dashboards for Analytics
6. Notifications and Alerts System

b. Prioritization Criteria and Description

Criteria	Description
Feasibility	The ease of implementation within Salesforce using available tools.
Impact	The degree to which the feature improves business operations and efficiency.
Complexity	The level of technical difficulty and time required to implement the feature.
Priority Level	Determines the order of execution based on feasibility and business importance.

c. Prioritization Matrix

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

3. Prioritization Rationale

1. Phase 1 – Foundational Modules (High Priority):

The Inventory and Customer Relationship modules are implemented first as they form the foundation of the jewelry CRM. These are critical for daily business operations and can be developed using declarative Salesforce tools such as Custom Objects, Fields, and Relationships.

2. Phase 2 – Automation and Security (Medium Priority):

The next phase focuses on automating business logic through Flows and Apex Triggers, along with implementing Profiles, Roles, and Permission Sets for secure data access.

3. Phase 3 – Insights and Enhancements (Low Priority):

Finally, Reports, Dashboards, and Notification Systems are built to enhance business insights and user engagement after the core system is operational.

This prioritization approach ensures a phased, structured development process, minimizing risks and ensuring high business value delivery at each stage.

4. Expected Outcomes

- Better understanding of user needs through empathy-driven design.
- Structured development roadmap aligned with user priorities.
- Seamless integration of customer, sales, and inventory data within Salesforce.
- Automated workflows that reduce manual operations.
- Enhanced business visibility through dashboards and reports.

5. Summary

The Empathy Map Canvas helped capture the real challenges, motivations, and aspirations of jewelry business users. Combined with the Idea Prioritization Template, it provided a clear roadmap for building a Salesforce-based CRM system that is both technically feasible and business-relevant.

This user-centered and strategically prioritized approach ensures that the Salesforce CRM for Jewel Management project delivers meaningful results, improves operational efficiency, and reflects a complete understanding of modern CRM design principles.