

IDEATION PHASE

Brainstorm & idea Prioritization Template

Date	
Team ID	NM2025TMID04983
Project Name	Prevent User Deletion if Assigned to an Incident.
Maximum Marks	4 Marks

Ideation Phase – Problem Definition and Prioritization

1. Problem Definition

In the jewelry retail industry, managing customer relationships, inventory, and sales transactions manually often leads to inefficiencies, errors, and delays in decision-making. Many jewelry businesses still rely on paper-based or spreadsheet systems, which are inadequate for handling dynamic business processes and real-time customer demands.

The primary challenge is the absence of a centralized Customer Relationship Management (CRM) system that integrates customer data, product inventory, sales orders, and reporting functionalities. Without an automated solution, jewelry stores face issues such as inconsistent customer records, stock discrepancies, delayed follow-ups, and limited visibility into business performance.

After analyzing the workflow of a typical jewelry business, the following key problems were identified:

1. Fragmented Customer Information – Customer data is often scattered across different files or systems, making it difficult to track purchase history and preferences.
2. Manual Inventory Management – Stock levels are updated manually, leading to frequent errors and mismanagement of jewelry items.
3. Inefficient Order Processing – Orders are handled manually without automation, resulting in delays and lack of accuracy in billing or delivery.
4. Limited Reporting and Insights – Managers cannot easily access sales analytics or inventory trends due to lack of real-time dashboards.
5. Lack of Role-Based Access – All staff members have equal data access, which poses security and privacy risks.

These challenges highlight the need for a Salesforce-based CRM application that can automate, centralize, and streamline jewelry management operations.

2. Proposed Solution

To address the identified problems, the proposed solution is to design and implement a Salesforce CRM Application for Jewel Management. This system will serve as a unified platform that automates critical business functions, provides better visibility into customer behavior, and enhances operational efficiency.

The Salesforce platform will be used to:

Manage customer information and interaction history.

Maintain inventory records with accurate quantity and pricing details.

Automate order processing and stock adjustments using Flows and Apex Triggers.

Implement role-based access control through Profiles and Permission Sets.

Generate reports and dashboards for real-time business insights.

The solution will empower the jewelry business to improve accuracy, customer satisfaction, and decision-making capabilities.

3. Problem Statement

“Traditional jewelry businesses face inefficiencies in managing customer data, sales transactions, and inventory due to the lack of an integrated CRM solution. The proposed Salesforce CRM for Jewel Management aims to centralize business operations, automate routine processes, and provide real-time visibility into sales and stock performance.”

This statement clearly defines the core issue, scope, and purpose of the project, aligning with the objectives of the Naan Mudhalvan Salesforce Developer program.

4. Idea Prioritization

After defining the problem, multiple solution ideas were generated during the brainstorming phase. To ensure effective implementation, each idea was evaluated based on feasibility, business impact, complexity, and alignment with the project goals.

The following table represents the 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

5. Prioritization Rationale

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

The Customer and Inventory modules were prioritized first as they represent the foundation of jewelry business operations. These modules are highly feasible to implement using Salesforce declarative tools such as custom objects, fields, and relationships.

2. Phase 2 – Process Automation (Medium Priority):

Order automation and role-based access features were assigned medium priority as they require additional logic through Apex triggers and permission configurations.

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

Dashboards, reports, and alert systems were prioritized later, as they enhance analytical capability once core business data is stabilized.

This prioritization ensures a logical, phase-wise development process — starting from basic data modeling to advanced automation and analytics.

6. Expected Outcome

By clearly defining the problem and prioritizing the ideas, the project ensures structured development and maximum business value. The Salesforce CRM for Jewel Management will result in:

Centralized and easily accessible customer and inventory data.

Automated workflows that reduce manual effort and human error.

Improved reporting accuracy and faster decision-making.

Secure, role-based access to sensitive business information.

A scalable CRM foundation adaptable to future jewelry business needs.