

Ideation Phase

Define the Problem Statements

Date	Team ID	Project Name	Maximum Marks
02 NOV 2025	NM2025TMID05622	CRM Application for Jewel Management	2 Marks

Customer Problem Statement Template:

Jewelry businesses face issues when manually managing customers, sales, and billing data. Inaccurate or duplicate entries lead to confusion, missing records, and errors in billing. Manual processes also cause delays in tracking high-value items and understanding customer purchase history. This reduces customer satisfaction and makes management decisions less data-driven.

The business needs a cloud-based CRM solution that ensures accurate and secure data handling. Automated billing, real-time dashboards, and customer engagement tracking can help avoid operational delays. This will improve efficiency, maintain data integrity, and enhance user confidence in the system.

Problem & Solution Table:

Problem	Description	Solution
Data Duplication	Duplicate customer and billing records cause confusion and revenue mismatches.	Automate data entry and use validation rules to avoid duplication.
Billing Errors	Manual billing leads to incorrect totals and missing entries.	Implement automated billing through Salesforce Flows.

Inventory Tracking	Manual updates cause mismatched stock records.	Use real-time dashboards for inventory and sales updates.
Customer Management	Difficult to track customer history and preferences.	Create custom objects to store complete customer purchase details.
Access Control	All users have similar access, risking data security.	Use Profiles and Permission Sets to restrict user roles.

(Insert Screenshot of Problem & Solution Diagram Here)

Example:

Problem Statement (PS)	I am (Customer)	I'm trying to	But	Because	Which makes me feel
PS-1	A Sales Staff	Generate a bill	the system is slow	manual entry takes more time	frustrated and delayed
PS-2	A Store Manager	Track stock details	data is inconsistent	inventory records are not updated	worried about stock mismatch

- Problem Statement PS1:

As a sales staff, I am trying to generate customer bills efficiently, but the system requires multiple manual steps and repeated data entry. This causes delay and sometimes leads to errors. I need a faster automated billing system that saves customer details for future transactions.

- Problem Statement PS2:

As a store manager, I want to monitor inventory in real-time, but due to inconsistent updates, the available stock data is unreliable. A Salesforce-based dashboard will help visualize live stock and prevent mismatch errors during billing and purchase planning.

Reference:

<https://miro.com/templates/customer-problem-statement/>