

Ideation Phase

Define the Problem Statements

Date	3 NOVEMBER 2025
Team ID	NM2025TMID06540
Project Name	CRM Application for Jewel Management (Developer)
Maximum Marks	2 Marks

Customer Problem Statement Template:

Jewelry businesses handle a large volume of customer data — including purchases, item specifications, pricing, payments, and return details.

Currently, most of these processes are **managed manually** or through basic software, which causes inefficiency, data duplication, and inconsistent customer experiences.

The lack of a **centralized CRM system** makes it difficult to track customer interactions, pricing updates, and payments in real-time.

This results in reduced operational accuracy, slower service response, and loss of valuable insights into sales performance.

Jewelry business owners need a reliable **CRM system** to automate their sales, customer management, billing, and reporting processes.

Without automation and integration, businesses face delays, data inconsistencies, and poor visibility into customer relations and performance metrics

Problem & Solution Table

Problem	Description	Solution
Data Integrity Risk	Managing customer and order information in isolated silos leads to inconsistent data and incomplete.	Implement a centralized CRM system to link customer, item, and order records.
User Confusion	Disconnected item pricing and order processes lead to complexities and inaccuracies in job calculations.	Unified modules for "Price" and "item" ensure accurate and consistent pricing.
Manual Billing Updates	Payments and billing information require manual data entry for every transaction.	Automatically archive paid amounts through trigger handlers and workflows.
Workflow Securition	Users can be deleted even when assigned to active customers or incidents.	Implement validation rules to prevent user deletion when linked to active records.
Limited Insights	Performance analytics and revenue tracking are unavailable.	Sales and performance dashboards are implemented.

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

Example:

Problem Statement (PS)	I am (Customer)	I'm trying to	But Because	Which makes me feel
PS- A Sales Admin	Update the paid amount in the billing record	The value doesn't change automatically	There's no automation or trigger to update payment after billing	Frustrated and overworked
PS- A Store Manager	Delete a staff user no longer in service	The system blocks deletion	The user is still linked to active orders or customer records	Stuck and confused

PS- A Customer	Manage and track order returns	It's difficult to find pending return requests	There's no automated reminder or return tracking	Disorganized workflow
3 Executive				

Problem Statement PS 1:

Highlights the **data integrity issue** caused when users assigned to active records can't be deleted safely.

→ **Solution:** Add a **Prevent User Deletion Trigger** to protect linked records.

Problem Statement PS 2:

Emphasizes the **manual workload** in updating gold/silver prices daily.

→ **Solution:** Introduce a **Price__c Object** with daily update automation.

Problem Statement PS 3:

- Focuses on **inaccurate billing calculations** due to missing formula updates.
→ **Solution:** Implement a **Billing Trigger Handler** to auto-update total and paid amounts.