Ideation Phase

# Brainstorm & Idea Prioritization Template

|  |  |  |
| --- | --- | --- |
| Date | Team ID | Project Name |
| 22 June 2025 | LTVIP2025TMID31088 | CRM Application for Banquet Hall Booking |

Maximum Marks: 4 Marks

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.  
  
Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

## Step-1: Team Gathering, Collaboration and Select the Problem Statement

Selected Problem Statement:  
"Manual banquet hall booking processes are inefficient, leading to double bookings, missed leads, and poor customer follow-up. There is a need for a centralized, automated system that manages bookings and customer relationships."

## Step-2: Brainstorm, Idea Listing and Grouping

Raw Ideas:

- Real-time availability calendar

- Customer profile with history

- Auto email/SMS notifications

- Payment gateway integration

- Event feedback collection

- Booking confirmation receipt

- Dashboard for hall analytics

- Search and filter halls by features

- Loyalty/reward system for frequent users

Grouped Ideas:

- Communication & Follow-Up: Email/SMS, confirmation receipts, reminders

- Customer Management: Profile, history, feedback

- Admin Features: Analytics, dashboard, listings control

- Transaction Tools: Payment system, booking receipt

- User Convenience: Filters, real-time slots, mobile app

## Step-3: Idea Prioritization

|  |  |  |
| --- | --- | --- |
|  | High Impact | Low Impact |
| High Feasibility | Booking calendar, CRM profile, auto notifications | Feedback system, admin dashboard |
| Low Feasibility | Loyalty/reward system, mobile app | AI-based suggestions, chat assistant |

Final Selected Features:

- Booking with real-time availability

- Customer CRM profile (history + contact info)

- Email/SMS confirmations and reminders

- Payment integration (UPI/Cards)

- Post-event feedback option

**Brainstorming, Idea Generation & Prioritization Document**

**Date:** 22 June 2025  
**Project Title:** CRM Application for Banquet Hall Booking  
**Team Members:** [Kanigalla Santhosh,Geetha laxmi M,G susheel kumar,G Bhanu Pravallika]  
**Team ID:** [LTVIP2025TMID31088]

### **Step 1 – Team Gathering, Collaboration, and Problem Statement Selection**

**Selected Problem Statement:**  
Manual banquet hall booking processes are inefficient and lead to customer dissatisfaction due to the lack of automation, centralized customer data management, and real-time communication features. There is a clear need for a CRM system that enables digital booking, automated communication, customer profiling, and analytics.

### **Step 2 – Brainstorming, Idea Listing, and Grouping**

**Raw Ideas Generated:** - Online booking system with calendar - Email and SMS confirmations - Customer profile and CRM database - Secure payment gateway - Customer feedback and rating system - Analytics dashboard for managers - Event reminders and follow-ups - Admin panel to manage halls and bookings - AI-based recommendations for halls - Loyalty rewards program

**Grouped Idea Categories:** - **Communication:** Email/SMS confirmations, reminders - **Core CRM Features:** Customer database, history, profiles - **User Experience:** Online booking, feedback, search/filter - **Business Insights:** Analytics, dashboards - **Advanced Features:** AI recommendations, loyalty program

### **Step 3 – Idea Prioritization**

**Prioritization Matrix:**

|  | High Impact | Low Impact |
| --- | --- | --- |
| **High Feasibility** | Booking system, CRM database, SMS/email notifications | Feedback system, Admin panel |
| **Low Feasibility** | AI-based recommendations, real-time chat | Loyalty rewards program |

**Top Priority Features for MVP (Minimum Viable Product):** - Real-time booking calendar - Centralized CRM for customers - Auto email/SMS confirmations and reminders - Secure payment integration - Basic analytics and reporting tools - Feedback and rating module

**Conclusion:**  
The brainstorming session led to a clear identification of key modules required to build an effective CRM application for banquet hall bookings. Ideas were filtered based on impact and feasibility to focus on features that offer high value with achievable implementation in the short term.

Building a CRM Application for Banquet Hall Booking

# Building a CRM Application for Banquet Hall Booking

This document outlines the systematic development of a Customer Relationship Management (CRM) application tailored specifically for banquet hall booking. The application aims to streamline operations, enhance customer interactions, and improve overall efficiency for banquet hall businesses. We will navigate through essential milestones, from initial setup to advanced automation and reporting, ensuring a robust and user-friendly system.

## Milestone 1: Creation of Developer Account

The foundational step in developing any CRM application, especially on platforms like Salesforce, is the creation of a developer account. This account provides a dedicated environment, often referred to as a "Developer Org," where you can build, customize, and test your application without impacting live production data. It grants access to all necessary tools, features, and resources required for development, including administrative privileges to configure objects, fields, and automation. This isolated sandbox is crucial for iterative development and ensures a stable environment for learning and experimentation.

## Milestone 2: Object Creation

At the core of any CRM are its objects, which represent the various types of data the system will store and manage. For a banquet hall booking application, key custom objects would include:

**Banquet Hall:** To store details about each hall (e.g., capacity, location, amenities).

**Client:** To manage customer information (e.g., contact details, preferences).

**Event:** To detail each specific event booking (e.g., event type, date, time, guest count).

**Booking:** To link a client, an event, and a specific banquet hall, managing booking status and financial details.

**Service/Menu Item:** To list available catering options, decorations, or other add-on services.

These objects form the relational database structure, enabling the system to connect related pieces of information efficiently.

## Milestone 3: Tabs

Once custom objects are defined, creating custom tabs provides a user-friendly interface for navigation. Each tab serves as a direct link to a specific object's data, allowing users to easily access lists of records and create new ones. For instance, a "Banquet Halls" tab would display all available halls, a "Bookings" tab would show all current and past reservations, and a "Clients" tab would list all customer profiles. Tabs are essential for intuitive navigation within the CRM, organizing the data logically and improving user adoption.

## Milestone 4: The Lightning App

To consolidate all the components of our banquet hall booking CRM into a cohesive and easily accessible platform, we will build a Lightning App. A Lightning App is a container that brings together custom objects, tabs, reports, dashboards, and other functionalities into a single, branded application. This provides users with a tailored experience, centralizing all relevant tools and information in one place. It streamlines workflows, reduces clicks, and enhances productivity by presenting a unified interface specific to the banquet hall booking process.

## Milestone 5: Fields

Fields are the individual data points stored within each object. Designing comprehensive custom fields is critical for capturing all necessary information. For the "Event" object, fields might include "Event Date," "Start Time," "End Time," "Number of Guests," "Event Type" (e.g., Wedding, Corporate, Birthday), "Menu Selection," and "Special Requests." For the "Client" object, fields like "Phone Number," "Email," and "Company Name" would be essential. "Booking" object fields would cover "Booking Status" (e.g., Pending, Confirmed, Cancelled), "Deposit Amount," and "Total Price." Properly defined fields ensure data integrity and completeness, which are vital for reporting and process automation.

## Milestone 6: Creation of Page Layout

Page layouts dictate how records for a particular object are displayed to users. This milestone involves arranging fields, related lists, and custom buttons on a record detail page in a logical and user-friendly manner. For a "Booking" record, for example, the page layout would display essential booking details prominently at the top, followed by client information, event specifics, and related lists like payments or tasks. A well-designed page layout improves data entry efficiency, reduces errors, and ensures that critical information is easily accessible, enhancing the overall user experience.

## Milestone 7: Creation of Record Types

Record types allow for different business processes, picklist values, and page layouts to be associated with different types of records within the same object. For the "Event" object, one might create record types for "Wedding Events," "Corporate Events," and "Social Gatherings." Each record type could have its own specific set of fields, required information, and a distinct page layout to streamline data entry based on the event's unique requirements. This enhances data relevance and simplifies the user interface by presenting only pertinent information for a given scenario.

## Milestone 8: Validation Rules

Validation rules enforce data quality and consistency by preventing users from saving records that do not meet specified criteria. For instance, a validation rule could ensure that the "Event Date" cannot be in the past, or that the "Number of Guests" field is always a positive integer. Another rule might ensure that a "Deposit Amount" is entered before a "Booking Status" can be set to "Confirmed." These rules are critical for maintaining the accuracy and reliability of the data within the CRM, reducing manual errors and improving data integrity.

## Milestone 9: Flows

Salesforce Flows are powerful automation tools that enable the automation of complex business processes without writing code. For our banquet hall CRM, flows can automate tasks such as:

**Booking Confirmation:** Automatically send an email confirmation to the client upon booking.

**Payment Reminders:** Schedule automated email reminders for upcoming payment due dates.

**Task Creation:** Automatically create follow-up tasks for sales or event coordination teams after a booking is confirmed.

**Availability Check:** Guide users through a guided screen flow to check hall availability based on event date and time.

Flows significantly enhance operational efficiency by automating repetitive tasks, improving responsiveness, and ensuring consistent execution of business rules.

## Milestone 10: Triggers

While Flows handle many automation needs, Apex Triggers are used for more complex, programmatic automation logic that cannot be achieved with standard declarative tools. Triggers execute before or after records are inserted, updated, or deleted. Examples in a banquet hall CRM could include:

**Complex Availability Management:** Automatically update the availability calendar of a hall when a booking is created or cancelled, considering multiple concurrent events.

**Revenue Roll-up:** Automatically calculate and update total revenue on the Banquet Hall record whenever a related booking's price is adjusted.

**Cross-object Data Synchronization:** Synchronize specific data points between related objects that require complex conditional logic.

Triggers provide the flexibility to implement highly customized and intricate business logic, ensuring data consistency and process integrity.

## Milestone 11: Reports

Reports are essential for gaining insights into the business operations. This milestone involves creating various types of reports to track key metrics and performance. Useful reports for a banquet hall CRM would include:

**Bookings by Month/Quarter:** To track booking trends over time.

**Revenue by Banquet Hall:** To identify top-performing halls.

**Client Acquisition Report:** To monitor new client sign-ups.

**Event Type Analysis:** To understand the most popular event types.

**Upcoming Events:** A list of all confirmed events for the next week/month.

Reports provide actionable data, helping management make informed decisions regarding marketing, resource allocation, and strategy.

## Milestone 12: Dashboards

Dashboards provide a visual representation of key business metrics, drawing data from multiple reports. They offer a high-level, at-a-glance overview of the banquet hall's performance. Examples of dashboard components include:

A gauge showing current booking occupancy percentage.

A chart illustrating revenue breakdown by event type.

A component displaying the number of new client leads this month.

A chart tracking the conversion rate of inquiries to confirmed bookings.

Dashboards are invaluable tools for real-time monitoring of business health, enabling quick identification of trends, opportunities, and areas requiring attention, thereby supporting proactive management decisions.

## Milestone 13: Conclusion

The development of a CRM application for banquet hall booking, following these comprehensive milestones, culminates in a powerful and efficient system. From establishing the foundational developer environment and defining core data objects to implementing advanced automation with Flows and Triggers, and finally enabling insightful reporting and dashboards, each step contributes to a robust solution. This CRM will empower banquet hall businesses to manage their bookings, clients, and events more effectively, automate repetitive tasks, improve communication, and leverage data-driven insights to enhance customer satisfaction and drive growth. The application serves as a central hub for all operational activities, transforming the way banquet hall services are managed and delivered.

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