

## 1. Agile Document: Definition of Done (DoD)

 **Project:** CRM Enhancement for Tax Filing Company

### Objective

Establish a common understanding among the Agile team of what "done" means for every user story, feature, or task in the CRM enhancement initiative to ensure consistent quality and delivery.

### Scope

Applies to all user stories, bug fixes, and enhancements related to the CRM used by sales, onboarding, support, and tax consultants in a tax filing company.

### Definition of Done Checklist

| Category              | Definition of Done Criteria                                                                         |
|-----------------------|-----------------------------------------------------------------------------------------------------|
| Requirement Clarity   | ✓ User story is clearly defined, understood, and has acceptance criteria.                           |
| Design & Analysis     | ✓ Functional impact assessed and documented.<br>✓ Wireframes or mockups (if applicable) reviewed.   |
| Development           | ✓ Code written, committed, and peer-reviewed.<br>✓ Follows coding standards and naming conventions. |
| Unit Testing          | ✓ Unit tests written and passed.<br>✓ Code coverage > 80% (if applicable).                          |
| Integration           | ✓ Integrated with CRM modules (e.g., client records, employee tax info, document uploads).          |
| Acceptance Testing    | ✓ QA verified against acceptance criteria.<br>✓ Logged bugs are fixed or documented for backlog.    |
| UAT                   | ✓ Business stakeholders or tax domain SMEs verified and signed off in UAT environment.              |
| Documentation         | ✓ Technical/functional documentation updated.<br>✓ Release notes prepared (if needed).              |
| Security & Compliance | ✓ GDPR or local data privacy requirements met.<br>✓ Access controls tested.                         |
| Deployment Readiness  | ✓ Code deployed to staging.<br>✓ Deployment checklist completed.                                    |
| Done-Done             | ✓ Product Owner reviews and accepts story.<br>✓ Jira ticket moved to "Done".                        |

### Notes on Iterative Application

- The Definition of Done is reviewed at the start of every release cycle.
- Updates are made collaboratively by the Product Owner, QA Lead, and Scrum Master.
- Exceptions (e.g., partial compliance) must be flagged and approved before deployment.

## DOCUMENT -2 Product Vision

### Vision Statement:

To transform our CRM system into a comprehensive, user-friendly, and intelligent platform that streamlines client management, tax document processing, and compliance tracking for our users.

### Business Objectives:

- ☐ ☐ Improve operational efficiency in client onboarding and tax documentation.
- ☐ ☐ Enhance user experience and reduce time spent navigating the CRM.
- ☐ ☐ Automate repetitive tasks such as reminders, form submissions, and status tracking.
- ☐ ☐ Ensure data accuracy and real-time reporting for compliance purposes.
- ☐ ☐ Support scalability for future tax seasons and increased client volume.

### Target Users:

- Internal staff including tax preparers, client success teams, and onboarding specialists
- Clients who use the portal to upload documents, track status, and communicate with tax consultants

### Key Features:

- ☐ ☐ Client profile management with secure document uploads
- ☐ ☐ Integrated task assignment and progress tracking
- ☐ ☐ Automated status notifications and document submission reminders
- ☐ ☐ Custom dashboard for tax preparers with workload metrics
- ☐ ☐ Real-time chat support and client communication history
- ☐ ☐ Compliance-ready data validation and logging

### Success Metrics:

- ☐ ☐ 30% reduction in onboarding time per client
- ☐ ☐ 25% fewer manual errors in data entry
- ☐ ☐ 50% faster resolution of client support tickets
- ☐ ☐ High user satisfaction score (>90%) from internal users
- ☐ ☐ Compliance issues logged reduced by 40% over two tax cycles

### Risks & Assumptions:

- Integration dependencies with legacy systems may require additional development effort.
- Assumes continued access to updated tax regulations and compliance frameworks.

- User training and adoption may take time initially but will improve over usage cycles.

## Document -3 User Stories

This document outlines key user stories for the CRM enhancement project to improve client management, document handling, and operational workflows in a tax filing company. Each user story is defined from the perspective of end users and stakeholders.

### User Stories:

| User Story ID | As a...                      | I want to...                                            | So that I can...                                      |
|---------------|------------------------------|---------------------------------------------------------|-------------------------------------------------------|
| US001         | Client Onboarding Specialist | input client data and upload documents                  | ensure accurate and timely client onboarding          |
| US002         | Tax Preparer                 | view assigned client documents and task deadlines       | complete tax filings efficiently                      |
| US003         | Client                       | receive notifications for document submission deadlines | avoid delays in my tax filing process                 |
| US004         | Admin                        | generate performance reports for staff activity         | track efficiency and manage workloads better          |
| US005         | Customer Support Agent       | communicate with clients via chat within CRM            | respond to queries faster without switching platforms |

### Example Acceptance Criteria:

- The system must allow document uploads in PDF or JPG format.
- Notifications should be sent via email and CRM dashboard.
- Chat messages must be stored and searchable by client ID.
- Reports should include filters for date, user, and client type.

## Document – 4 Agile PO Experience

### Agile Product Owner

Industry: Tax Filing / CRM Enhancement

Environment: Agile Scrum | Jira | Zephyr | Confluence | UAT | Stakeholder Collaboration

### Core Responsibilities

| Area               | Details                                                                                        |
|--------------------|------------------------------------------------------------------------------------------------|
| Vision & Roadmap   | Defined and maintained product vision aligned with strategic goals for CRM enhancement.        |
| Backlog Management | Created, refined, and prioritized product backlog in Jira ensuring transparency and alignment. |

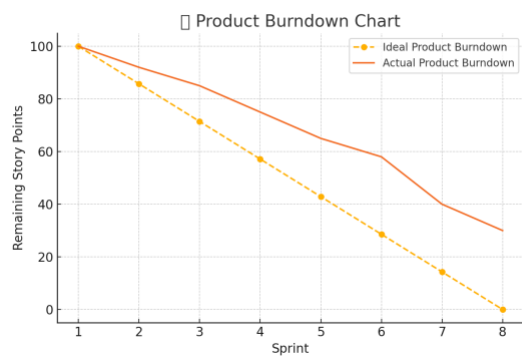
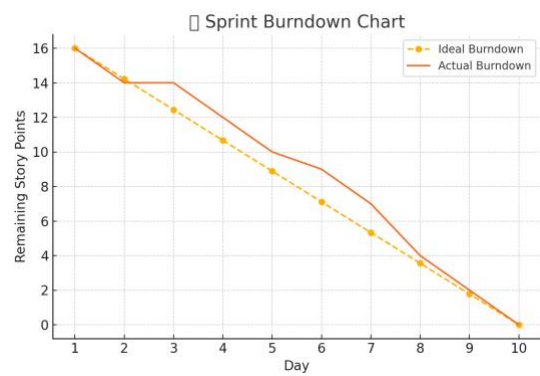
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|---------------------------|------------------------------------------------------------------------------------------------|
| User Story Creation       | Authored clear, testable user stories with detailed acceptance criteria and business value.    |
| Stakeholder Collaboration | Acted as the primary liaison between business, development, QA, and leadership teams.          |
| Sprint Planning           | Participated in sprint planning, backlog grooming, and daily stand-ups to ensure deliverables. |
| Release Management        | Coordinated CRM release cycles, UAT testing, and sign-offs with tax operations teams.          |
| User Acceptance Testing   | Defined UAT scope, test scenarios, and obtained stakeholder sign-off for production readiness. |
| Feedback Loop             | Gathered post-release feedback to drive continuous improvement and iterative development.      |

#### Tools & Techniques

- ☐☐ Jira: User story tracking, sprint planning, backlog refinement
- ☐☐ Zephyr for Jira: Test case and defect management integration
- ☐☐ Confluence: Product documentation, vision board, sprint goals
- ☐☐ MS Excel / Power BI: Reporting sprint velocity and user satisfaction
- ☐☐ User Personas / Journey Mapping: To validate user needs during prioritization
- ☐☐ Agile Ceremonies: Daily stand-ups, retrospectives, reviews, sprint demos

#### Impact Highlights

- ☐☐ Reduced manual entry by 40% through CRM automation enhancements
- ☐☐ Improved feature delivery timelines by 25% using refined backlog practices
- ☐☐ Increased stakeholder satisfaction with clear visibility via Jira dashboards
- ☐☐ Ensured regulatory readiness (e.g., 100% tax compliance logic traceable in CRM)



| Product Backlog |            |                         |          |             |
|-----------------|------------|-------------------------|----------|-------------|
| #               | Backlog ID | Title                   | Priority | Status      |
| 1               | PB001      | User Login              | High     | To Do       |
| 2               | PB002      | Client Dashboard        | High     | To Do       |
| 3               | PB003      | Document Upload         | Medium   | In Progress |
| 4               | PB004      | Tax Status Notification | Medium   | In Progress |
| 5               | PB005      | Admin Reporting         | Low      | Done        |
|                 |            |                         |          |             |
|                 |            |                         |          |             |
|                 |            |                         |          |             |

| Sprint Backlog |           |                  |              |             |
|----------------|-----------|------------------|--------------|-------------|
| #              | Sprint ID | Title            | Story Points | Status      |
| 1              | SB001     | User Login       | 5            | Done        |
| 2              | SB002     | Client Dashboard | 8            | In Progress |
| 3              | SB003     | Document Upload  | 3            | To Do       |

## Document -6 Sprint meetings

Sprint meetings are essential Agile ceremonies that facilitate planning, collaboration, review, and continuous improvement throughout the software development cycle. This document outlines the key sprint meetings, their purpose, participants, and best practices.

### Sprint Planning

Objective: Define the sprint goal and select user stories from the product backlog.

Participants: Product Owner, Scrum Master, Development Team

Key Activities:

- Discuss product backlog items
- Estimate effort and capacity
- Define sprint goal
- Commit to sprint backlog

### Daily Scrum (Stand-Up)

Objective: Synchronize team progress and identify blockers.

Participants: Development Team (optional: Scrum Master, Product Owner)

Timebox: 15 minutes

Each member answers:

- What did I do yesterday?
- What will I do today?
- Are there any impediments in my way?

### Sprint Review

Objective: Demonstrate completed work and gather feedback from stakeholders.

Participants: Scrum Team, Stakeholders

Key Activities:

- Present what was completed
- Review metrics and progress toward the goal
- Capture stakeholder feedback
- Update product backlog if needed

### Sprint Retrospective

Objective: Reflect on the sprint and identify improvements.

Participants: Scrum Team

Key Questions:

- What went well?
- What didn't go well?
- What can we improve in the next sprint?

### Best Practices for Sprint Meetings

- ☐ ☐ Timebox each meeting and start on time.
- ☐ ☐ Use a shared board (e.g., Jira, Trello) to visualize progress.
- ☐ ☐ Keep focus on goals and outcomes rather than task details.
- ☐ ☐ Document action items and follow-ups from each meeting.
- ☐ ☐ Promote psychological safety and open communication.