# Document 1: Definition of Done (DoD)

The *Definition of Done (DoD)* ensures that all tasks, features, or enhancements in the Sales CRM project meet a set of predefined criteria before being considered completed.

The goal is to ensure the CRM is functional, user-friendly, secure, and ready for deployment.

**Definition of Done (DoD) Checklist for Sales CRM-**

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| **Parameter** | **Description** | **Status** |
| Functional Completion | All Acceptance Criteria for the user story are met and fully implemented. | [ In Progress] |
| UI Elements Implementation | All UI elements (buttons, text fields, forms) are implemented correctly and match the design specification. | [Not Done / In Progress / Done] |
| Error Handling | All possible errors are caught, and clear error messages are displayed to guide the user. | [Not Done / In Progress / Done] |
| Data Validation | All inputs are validated (e.g., email addresses, phone numbers) before they are processed. | [Not Done / In Progress / Done] |
| Business Logic | The CRM correctly applies business rules (e.g., lead scoring, sales process stages) according to the organization’s needs. | [Not Done / In Progress / Done] |
| Data Correctness | The CRM displays up-to-date and accurate data (e.g., sales forecasts, customer details). | [Not Done / In Progress / Done] |
| Performance (Load Time) | The application loads pages within an acceptable time frame, ensuring minimal waiting for users. | [Not Done / In Progress / Done] |
| Performance (Response Time) | Actions like searching for leads or saving data should respond within a reasonable timeframe. | [Not Done / In Progress / Done] |
| Load Handling | The system can support a high number of simultaneous users without crashing. | [Not Done / In Progress / Done] |
| Concurrency | The system can handle multiple users interacting with the same data simultaneously. | [Not Done / In Progress / Done] |
| Security | All sensitive data (e.g., customer details) is securely stored, and access is restricted by user roles. | [Not Done / In Progress / Done] |
| Data Encryption | Sensitive data, such as personal customer info, is encrypted both during storage and transmission. | [Not Done / In Progress / Done] |
| Session Management | User sessions are properly managed, with automatic logouts after inactivity. | [Not Done / In Progress / Done] |
| Compliance | The CRM meets relevant legal standards (e.g., GDPR, CCPA) for storing and processing data. | [Not Done / In Progress / Done] |
| Usability | The system is easy to navigate, and common tasks (e.g., adding a contact or creating a task) are intuitive. | [Not Done / In Progress / Done] |
| Cross-Browser Compatibility | The CRM should work seamlessly across different web browsers (e.g., Chrome, Firefox, Edge). | [Not Done / In Progress / Done] |
| Mobile Responsiveness | The user interface works well across different screen sizes (e.g., desktop, tablet, mobile). | [Not Done / In Progress / Done] |
| Unit Testing | Each component or module has been tested individually to ensure it functions correctly. | [Not Done / In Progress / Done] |
| Integration Testing | Tests confirm that different parts of the CRM (e.g., leads, contacts, and deals) work together properly | [Not Done / In Progress / Done] |
| End-to-End Testing | The entire CRM system is tested from start to finish to ensure all features work as intended. | [Not Done / In Progress / Done] |
| Regression Testing | Regression testing is done to ensure new features don’t break existing functionality. | [Not Done / In Progress / Done] |
| API Testing | Tests confirm that the APIs used to connect external systems (e.g., email integrations) work as expected. | [Not Done / In Progress / Done] |
| Deployment to Staging | The system has been deployed to a staging environment where it can be further tested. | [Not Done / In Progress / Done] |
| Code Review | Code has been reviewed by peers for quality, maintainability, and best practices. | [Not Done / In Progress / Done] |
| Documentation | Proper documentation is provided for the CRM (e.g., how to use new features, code comments). | [Not Done / In Progress / Done] |
| Product Owner Validation | Feature is reviewed and validated by the Product Owner to ensure it meets business goals and requirements. | [Not Done / In Progress / Done] |
| Release Notes | Release notes are created, summarizing the changes, bug fixes, and new features in the latest release. | [Not Done / In Progress / Done] |
| Post-Deployment Monitoring | Monitoring is set up to track performance and issues after deployment. | [Not Done / In Progress / Done] |
| User Acceptance Testing (UAT) | The feature has passed UAT, confirming that it meets the needs of the end-users and stakeholders. | [Not Done / In Progress / Done] |
| Issue Resolution | Any issues identified during UAT or post-deployment are logged, addressed, and resolved. | [Not Done / In Progress / Done] |

# Document 2- Product Vision

# A Product Vision document is an essential part of defining the project's overall goals, direction, and purpose. It aligns the team and stakeholders on what the final product should look like and what value it will deliver.

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| **Scrum Project Name:** | **Sales CRM BY ICICI Bank** |
| **Venue:** | ICICI Bank, Navi Mumbai RO |
| **Date**: 04-02-25 | **Start time**: 9:15 AM | **End time**: 5:30 PM | **Duration**: 12 MONTHS |
| **Client:** | ICICI BANK |  |  |
| **Stakeholder list:** | Mr. Sandeep Bakshi-MD CEO | Mr. Sandeep Batra- Sponserer | Mr. Pravin Dudhe-Tech Head |
|  | Mr. Prasanna-Compliance | Mrs. Venu-Security |  |
| **Scrum Team** |
| **Scrum Master** | Dhaval Bonde |  |  |
| **Product owner:** | Akanksha |  |  |
| **Scrum Developer 1:** | Dilip Sankpal |  |  |
| **Scrum Developer 2:** | Pawandeep Singh |  |  |
| **Scrum Developer 3:** | Ajinkya R |  |  |
| **Scrum Developer 4:** | Neha Kumari |  |  |
| **Scrum Developer 5:** | Debasmita Das |  |  |
| **Target Group** | **Needs** | **Product** | **Value** |
| **Market Segment:** | **What problem does the product solve?** | **What product is it?** | **How is the product going to benefit the company?** |
| **Small and Medium Enterprises (SMEs) and Large Organizations, banks and other financial institutes** | **Manual data entry is time Consuming Processes and hampering productivity of the sales team.** | The product is an enhanced version of the Sales CRM. | By automating and streamlining tasks like call logging, customer profiling, and data entry, the CRM helps sales teams focus more on selling and less on administrative work. And eventually leading to increased sales. |
|  | System lacks real time insights. Managers need more visibility into team performance, forecasting, and customer data to make informed decisions. | Enhanced features include-Cloud Calling Integration, Integration with Customer Servicing Software, One-Click Customer Profiling. | - Improved Customer Interactions: Instant access to a customer's comprehensive profile (including TRV,PA offers) enables sales reps to have more personalized, relevant conversations, increasing the chances of conversion. |
|  | Sales reps need to switch between multiple platforms (CRM, customer service software) to gather customer data, resulting in a fragmented experience. | The product is desirable because it is compatible on mobile phone and the sales representative can get access to the system as and when needed, mostly when interacting with customer on customer visits.  | - Boosts customer satisfaction by ensuring personalized, accurate, and timely responses. |
| **Target Users:** | **Which benefit does it provide?** | **What makes it desirable and special?** | **What are the business goals?** |
| Sales Representatives ,Sales Managers, Business Development Teams, IT and Admin Users |  Cloud Calling Integration: Automatic call logging means sales reps no longer need to manually enter call data, reducing administrative overhead and improving accuracy. | Centralizes and integrates customer data from multiple sources.With just a single click, sales reps can access a full customer profile, including TRV (Total Relationship Value), ongoing loans with other banks, and pre-approved offers, enabling them to make better-informed decisions.. | Increase Sales Efficiency: Enable sales teams to reduce manual work, allowing them to close more deals faster.Boost Adoption Rates: Ensure that the CRM is user-friendly and mobile-responsive, leading to higher adoption rates among sales teams. |
| Compliance officers, business analysts. |  Reduces time spent searching for information across disparate systems and improves operational speed. | The platform is scalable, with cloud-based architecture, and can integrate with existing systems and external tools. | Enhance Customer Experience: Empower sales reps with the tools they need to provide timely, personalized service to customers, ultimately driving customer satisfaction and loyalty. |
| **Target Customers:** | Ensures data consistency and accuracy across various departments and user interactions. | User-friendly interface that works across web and mobile platforms, allowing employees to be productive anywhere. | Support Organizational Growth: Design a scalable CRM system that can handle increasing numbers of leads, users, and data as the company grows. |
| - Internal users (e.g., employees handling customer data and CRM). | A more efficient and intuitive platform to manage leads, track opportunities, and improve overall productivity with automated call logging and comprehensive customer profiles. | Secure with encryption, robust authentication, and role-based access control to protect sensitive data. | Achieve higher customer retention by providing personalized experiences and resolving issues faster. |
|  | Real-time visibility into the sales pipeline, team performance, and customer data for sales Manager/ Leaders. | Provides actionable insights and analytics based on customer data, supporting business growth and customer service. | Align with regulatory compliance requirements, particularly for data privacy and KYC regulations. |
|  | Streamlined processes to quickly identify high-quality leads, track their engagement, and convert them into opportunities for the Business Development Team. |  | Improve Data-Driven Decisions: Provide sales managers with real-time insights to optimize strategies and achieve better sales outcomes. |

 **Document 3: User stories**

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| User Story No: 1 | Tasks: 03 | Priority: High |
| **AS A SALES REPRESENTATIVE****I WANT TO VIEW A CUSTOMER’S PAST INTERACTIONS ACROSS ALL CHANNELS****SO THAT I CAN HAVE INFORMED AND CONTEXTUAL SALES CONVERSATIONS** |
| BV: 500 | CP: 02 |
| **Acceptance Criteria:**# Display customer interaction history (calls, emails, meetings, chats) in CRM.# Show timestamps, interaction types, and key conversation details.# Ensure real-time updates for newly logged interactions. |

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| User Story No: 2 | Tasks: 02 | Priority: Medium |
| **AS A SALES MANAGER****I WANT TO TRACK INTERACTIONS OF MY SALES TEAM WITH PROSPECTS****SO THAT I CAN MONITOR ENGAGEMENT AND PROVIDE COACHING IF NEEDED** |
| BV: 200 | CP: 03 |
| **Acceptance Criteria:**#Display a summary of interactions per sales representative.# Allow filtering interactions by sales team member, prospect, or deal stage.# Provide engagement metrics (e.g., response time, interaction frequency). |

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| User Story No: 3 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE****I WANT TO LOG MY CUSTOMER INTERACTIONS AUTOMATICALLY****SO THAT I DON’T HAVE TO ENTER THEM MANUALLY** |
| BV: 500 | CP: 05 |
| **Acceptance Criteria:**# Automatically capture interactions from emails, calls, and calendar events.#Provide an option to edit or delete incorrect entries. |

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| User Story No: 4 | Tasks: 02 | Priority: Medium |
| **AS A SALES TEAM LEAD****I WANT TO RECEIVE NOTIFICATIONS FOR KEY CUSTOMER INTERACTIONS****SO THAT I CAN TAKE ACTION AT CRITICAL MOMENTS** |
| BV: 200 | CP: 03 |
| **Acceptance Criteria**# Set up alerts for important customer interactions (e.g., deal discussions, high-value prospects).# Receive notifications via email or CRM dashboard.# Provide an option to set notification preferences. |

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| User Story No: 5 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE****I WANT TO SEE INTERACTION HISTORY WITHIN THE CRM SALES PIPELINE****SO THAT I CAN UNDERSTAND A LEAD’S ENGAGEMENT BEFORE FOLLOWING UP** |
| BV: 500 | CP: 08 |
| **Acceptance Criteria:**# Display interaction history on each lead/opportunity record.# Allow filtering by interaction type (e.g., meetings, calls, emails).# Integrate with CRM sales pipeline to show engagement levels. |

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| User Story No: 6 | Tasks: 02 | Priority: Medium |
| **AS A SALES MANAGER****I WANT TO ANALYZE INTERACTION PATTERNS FOR TOP-PERFORMING SALES REPS****SO THAT I CAN IDENTIFY SUCCESSFUL ENGAGEMENT STRATEGIES** |
| BV: 200 | CP: 05 |
| **Acceptance Criteria:**# Generate reports on interactions by top sales performers.# Identify common engagement strategies that lead to conversions.# Provide insights into best practices for the sales team. |

1. **Campaign Management user stories :**

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| User Story No: 7 | Tasks: 02 | Priority: High |
| **AS A SALES MANAGER****I WANT TO CREATE AUTOMATED CAMPAIGN WORKFLOWS BASED ON CUSTOMER SEGMENTS****SO THAT I CAN TARGET THE RIGHT AUDIENCE WITH RELEVANT OFFERS** |
| BV: 500 | CP: 03 |
| **Acceptance Criteria:**# Ability to define dynamic customer segments based on demographics, behavior, and past interactions.# Set up automated workflows for personalized email, SMS, and social media campaigns.# Trigger actions based on customer engagement (e.g., open rate, clicks, and responses). |

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| User Story No: 8 | Tasks: 02 | Priority: Medium |
| **AS A SALES REPRESENTATIVE****I WANT TO RECEIVE AUTOMATED NOTIFICATIONS ABOUT HIGHLY ENGAGED CAMPAIGN LEADS****SO THAT I CAN FOLLOW UP PROMPTLY AND INCREASE CONVERSIONS** |
| BV: 200 | CP: 05 |
| **Acceptance Criteria:**# Generate real-time notifications when leads show high engagement (e.g., multiple email opens, website visits).# Provide lead scoring based on campaign interactions.# Allow sales reps to prioritize follow-ups within the CRM dashboard. |

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| User Story No: 9 | Tasks: 02 | Priority: High |
| **AS A CRM ADMINISTRATOR****I WANT TO AUTOMATE THE SCHEDULING AND EXECUTION OF MULTI-CHANNEL CAMPAIGNS****SO THAT CAMPAIGNS RUN EFFICIENTLY WITH MINIMAL MANUAL INTERVENTION** |
| BV: 500 | CP: 08 |
| **Acceptance Criteria:**# Enable scheduling of campaigns across email, SMS, and social media.# Provide a visual workflow builder to set up campaign sequences.#Automate drip campaigns based on predefined rules and customer behavior. |

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| User Story No: 10 | Tasks: 02 | Priority: Medium |
| **AS A SALES TEAM LEAD****I WANT TO TRACK THE PERFORMANCE OF MY TEAM’S CAMPAIGN FOLLOW-UPS****SO THAT I CAN IDENTIFY GAPS AND OPTIMIZE SALES STRATEGIES** |
| BV: 200 | CP: 03 |
| **Acceptance Criteria:**# Track campaign-driven leads and their progression through the sales pipeline.# Generate reports on follow-up activities and conversion rates.# Identify trends in customer responses to optimize future campaigns. |

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| User Story No: 11 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE****I WANT TO PERSONALIZE CAMPAIGN MESSAGES BASED ON CUSTOMER INTERACTIONS****SO THAT I CAN IMPROVE ENGAGEMENT AND RESPONSE RATES** |
| BV: 500 | CP: 03 |
| **Acceptance Criteria:**# Dynamically insert customer details into campaign messages (e.g., name, past purchases, preferences).# Use AI-driven recommendations to tailor messaging.# Track and adjust messaging based on customer engagement levels. |

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| User Story No: 12 | Tasks: 02 | Priority: Medium |
| **AS A SALES TEAM MEMBER****I WANT TO INTEGRATE AUTOMATED CAMPAIGNS WITH MY CRM SALES PIPELINE****SO THAT I CAN DIRECTLY ENGAGE WITH LEADS GENERATED FROM CAMPAIGNS** |
| BV: 200 | CP: 05 |
| **Acceptance Criteria:**# Automatically sync campaign leads with CRM opportunities.#Assign leads to the appropriate sales team members based on workflow rules.#Track campaign effectiveness by linking lead interactions to closed deals. |

1. **Activity tracking User Stories:**

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| User Story No: 13 | Tasks: 02 | Priority: High |
| **AS A SALES MANAGER****I WANT TO MONITOR ALL SALES ACTIVITIES IN A CENTRALIZED DASHBOARD****SO THAT I CAN TRACK TEAM PERFORMANCE AND IDENTIFY AREAS FOR IMPROVEMENT** |
| BV: 500 | CP: 05 |
| **Acceptance Criteria:**#Sales activities (calls, emails, meetings, demos) are automatically logged in the CRM.#Dashboard displays activity metrics (number of interactions, response times, conversion rates).# Ability to filter and view activity logs for individual sales reps or teams. |

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| User Story No: 14 | Tasks: 02 | Priority: Medium |
| **AS A SALES REPRESENTATIVE****I WANT MY SALES CALLS AND EMAILS TO BE AUTOMATICALLY TRACKED****SO THAT I CAN REVIEW MY INTERACTIONS WITH CUSTOMERS WITHOUT MANUAL DATA ENTRY** |
| BV: 200 | CP: 03 |
| **Acceptance Criteria:**# System automatically logs emails, calls, and meetings in the CRM.# Sales reps can manually add notes for key customer interactions.# Search and filter options for reviewing past interactions with customers. |

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| User Story No: 15 | Tasks: 02 | Priority: High |
| **AS A SALES TEAM LEAD****I WANT TO ANALYZE SALES ACTIVITY DATA ACROSS MY TEAM****SO THAT I CAN IDENTIFY TOP PERFORMERS AND COACH UNDERPERFORMING REPS** |
| BV: 500 | CP: 05 |
| **Acceptance Criteria:**# Generate reports on sales activities per team member.# Compare activity trends over time (daily, weekly, monthly).# Identify correlations between sales activities and conversion rates. |

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| User Story No: 16 | Tasks: 02 | Priority: Medium |
| **AS A CRM ADMINISTRATOR****I WANT TO ENSURE SALES ACTIVITIES ARE LOGGED IN REAL-TIME****SO THAT THERE IS NO LOSS OF DATA OR DUPLICATE ENTRIES** |
| BV: 200 | CP: 03 |
| **Acceptance Criteria:**#Sales activities sync instantly with CRM without manual intervention.#Duplicate detection prevents redundant activity logs.# Activity logs are securely stored and accessible for audits. |

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| User Story No: 17 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE****I WANT TO RECEIVE REMINDERS FOR FOLLOW-UPS BASED ON PAST ACTIVITIES****SO THAT I CAN ENGAGE CUSTOMERS AT THE RIGHT TIME TO CLOSE MORE DEALS** |
| BV: 500 | CP: 03 |
| **Acceptance Criteria:**#System automatically generates follow-up reminders based on customer interactions.#Notifications for upcoming follow-ups appear in the CRM dashboard.#Ability to customize follow-up schedules based on sales rep preferences. |

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| User Story No: 18 | Tasks: 02 | Priority: Medium |
| **AS A SALES TEAM MEMBER****I WANT TO EXPORT SALES ACTIVITY DATA INTO REPORTS****SO THAT I CAN SHARE PERFORMANCE INSIGHTS WITH STAKEHOLDERS** |
| BV: 200 | CP: 05 |
| **Acceptance Criteria:**#Ability to export activity tracking data in Excel, CSV, and PDF formats.#Customizable report templates for sales meetings and performance reviews.#Secure access control for report generation based on user roles. |

1. **Workflow and Approvals user Stories:**

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| User Story No: 19 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE****I WANT TO AUTOMATE LEAD APPROVALS BASED ON PREDEFINED CRITERIA****SO THAT I CAN QUICKLY MOVE QUALIFIED LEADS INTO THE SALES PIPELINE** |
| BV: 500 | CP: 08 |
| **Acceptance Criteria:**#Leads are automatically assigned to sales reps based on region, industry, or priority.#System triggers an approval request for high-value leads requiring manager approval.#Notifications sent to managers for pending lead approvals. |

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| User Story No: 20 | Tasks: 02 | Priority: Medium |
| **AS A SALES MANAGER****I WANT TO AUTOMATE DISCOUNT APPROVALS BASED ON SET RULES****SO THAT I CAN ENSURE PRICING CONSISTENCY AND REDUCE APPROVAL DELAYS** |
| BV: 200 | CP: 05 |
| **Acceptance Criteria:**#Discount requests below a set threshold auto-approved.#Discounts exceeding the threshold trigger an approval request.#Managers receive instant notifications for pending discount approvals. |

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| User Story No: 21 | Tasks: 02 | Priority: High |
| **AS A CRM ADMINISTRATOR****I WANT TO CONFIGURE CUSTOM APPROVAL WORKFLOWS****SO THAT I CAN ADAPT THE SYSTEM TO BUSINESS REQUIREMENTS WITHOUT DEPENDING ON IT TEAMS** |
| BV: 500 | CP: 05 |
| **Acceptance Criteria:**#Users can create and modify approval workflows without coding.#Predefined templates for common sales processes (discounts, deal approvals, contract sign-offs).#Role-based permissions to restrict workflow modifications. |

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| User Story No: 22 | Tasks: 02 | Priority: medium |
| **AS A FINANCE TEAM MEMBER****I WANT AUTOMATED VALIDATION OF SALES CONTRACTS****SO THAT I CAN REDUCE ERRORS AND SPEED UP THE APPROVAL PROCESS** |
| BV: 200 | CP: 08 |
| **Acceptance Criteria:**#Sales contracts auto-validated against pre-set compliance rules.#Contracts missing required fields trigger an error and cannot proceed.#Approved contracts are auto-forwarded to the legal team. |

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| User Story No: 23 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE****I WANT TO TRACK THE STATUS OF MY PENDING APPROVAL REQUESTS IN REAL TIME****SO THAT I CAN FOLLOW UP AND EXPEDITE CLOSURE OF DEALS** |
| BV: 500 | CP: 05 |
| **Acceptance Criteria:**#A dashboard displays the real-time status of approval requests.#Automated reminders for pending approvals beyond a set time frame.#Email and in-app notifications when an approval is completed or rejected. |

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| User Story No: 24 | Tasks: 02 | Priority: Medium |
| **AS A SALES MANAGER****I WANT TO GENERATE REPORTS ON APPROVAL WORKFLOW PERFORMANCE****SO THAT I CAN IDENTIFY BOTTLENECKS AND IMPROVE EFFICIENCY** |
| BV: 200 | CP: 03 |
| **Acceptance Criteria:**#Reports show average approval times per workflow.#System identifies frequent rejection reasons to refine approval criteria.#Performance tracking of team members involved in approvals. |

5. **Customer Service Automation user stories:**

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| User Story No: 25 | Tasks: 02 | Priority: High |
| **AS A CUSTOMER SUPPORT AGENT****I WANT AUTOMATED CASE ASSIGNMENT BASED ON CUSTOMER PRIORITY AND ISSUE TYPE****SO THAT I CAN ENSURE QUICK AND RELEVANT RESPONSES TO CUSTOMER QUERIES** |
| BV: 500 | CP: 05 |
| **Acceptance Criteria:**#Cases are automatically assigned to the most suitable agent based on issue type and urgency.#VIP customers’ issues are escalated to senior agents automatically.#Agents receive instant notifications when a new case is assigned. |

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| User Story No: 26 | Tasks: 02 | Priority: High |
| **AS A CUSTOMER****I WANT AN AUTOMATED RESPONSE SYSTEM FOR COMMON QUERIES****SO THAT I CAN GET QUICK SOLUTIONS WITHOUT WAITING FOR AN AGENT** |
| BV: 500 | CP: 03 |
| **Acceptance Criteria:**# AI-powered chatbot or knowledge base provides instant answers to FAQs.#Customers can escalate unresolved queries to live agents.#Chatbot learns from previous interactions to improve future responses. |

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| User Story No: 27 | Tasks: 02 | Priority: Medium |
| **AS A CUSTOMER SUPPORT MANAGER****I WANT AUTOMATED FOLLOW-UP REMINDERS FOR PENDING CUSTOMER CASES****SO THAT I CAN ENSURE TIMELY ISSUE RESOLUTION AND IMPROVE CUSTOMER SATISFACTION** |
| BV: 200 | CP: 05 |
| **Acceptance Criteria:**#System sends automated reminders to agents for unresolved cases nearing SLAs.#Escalation notifications are triggered if a case remains open beyond a set timeframe.#Customers receive progress updates on their case status. |

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| User Story No: 28 | Tasks: 02 | Priority: Medium |
| **AS A CUSTOMER SUPPORT AGENT****I WANT A PRE-BUILT RESPONSE TEMPLATES FEATURE****SO THAT I CAN QUICKLY RESPOND TO COMMON CUSTOMER ISSUES WITHOUT TYPING MANUALLY** |
| BV: 200 | CP: 08 |
| **Acceptance Criteria:**#Agents can select pre-written response templates for different case categories.#Templates can be customized before sending to ensure personalized communication.#System suggests relevant response templates based on customer queries. |

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| User Story No: 29 | Tasks: 02 | Priority: High |
| **AS A CUSTOMER SUPPORT MANAGER****I WANT TO AUTOMATE CUSTOMER FEEDBACK COLLECTION AFTER ISSUE RESOLUTION****SO THAT I CAN MEASURE CUSTOMER SATISFACTION AND IMPROVE SERVICE QUALITY** |
| BV: 500 | CP: 05 |
| **Acceptance Criteria:**#Automated surveys are sent to customers after case closure.#Feedback is categorized and analyzed to identify areas of improvement.#Low satisfaction scores trigger follow-up actions from customer support teams. |

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| User Story No: 30 | Tasks: 02 | Priority: Medium |
| **AS A CUSTOMER SUPPORT ANALYST****I WANT REPORTING AND ANALYTICS ON AUTOMATED CUSTOMER SERVICE PROCESSES****SO THAT I CAN IDENTIFY TRENDS, BOTTLENECKS, AND IMPROVEMENT OPPORTUNITIES** |
| BV: 200 | CP: 03 |
| **Acceptance Criteria:**#Reports display resolution time, response quality, and customer feedback.#System identifies recurring issues to improve knowledge base articles.#Data-driven insights help refine automation rules for better efficiency. |

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| User Story No: 31 | Tasks: 03 | Priority: Medium |
| **AS A SALES REPRESENTATIVE** **I WANT TO GET CUSTOMER SEGMENTATION RECOMMENDATIONS BASED ON BEHAVIORAL DATASO THAT I CAN TARGET THE RIGHT AUDIENCES FOR MY SALES EFFORTS** |
| BV: 200 | CP: 03 |
| **Acceptance Criteria:**# System automatically segments customers based on behaviour (e.g., purchase history, website interactions).# Recommendations are displayed on the CRM dashboard. # Sales reps can modify or exclude segments based on insights. |

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| User Story No: 32 | Tasks: 03 | Priority: High |
| **AS A SALES MANAGER****I WANT TO EAISLY TRACK THE SALES FUNNEL FOR MY TEAM SO THAT I CAN IDENTIFY STAGES THAT NEED ATTENTION AND IMPROVE CONVERSIONS** |
| BV: 500 | CP: 03 |
| **Acceptance Criteria:**# Visual representation of the sales funnel for all opportunities.# Clear indicators for each lead’s stage in the funnel#Ability to filter funnel data by sales rep, deal size, and industry. |

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| User Story No: 33 | Tasks: 02 | Priority: Medium |
| **AS A SALES REPRESENTATIVE****I WANT TO RECEIVE AI-DRIVEN PREDICTIONS ABOUT LEAD CONVERSIONSSO THAT I CAN FOCUS ON HIGH-PRIORITY LEADS** |
| BV: 200 | CP: 03 |
| **Acceptance Criteria:**# AI system generates a probability score for lead conversion based on historical data.# Sales reps can view the predicted conversion likelihood for each lead.# System recommends actions to increase the likelihood of conversion. |

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| User Story No: 34 | Tasks: 02 | Priority: Medium |
| **AS A CRM ADMINISTRATOR****I WANT TO ENABLE LEAD SCORING BASED ON MULTIPLE DATA POINTSSO THAT SALES REPS CAN PRIORITIZE LEADS MORE EFFECTIVELY** |
| BV: 200 | CP: 02 |
| **Acceptance Criteria:**# Lead score calculation includes multiple factors (e.g., engagement level, company size, budget).# Sales reps can see scores displayed on lead records.# Scoring system is configurable based on business needs. |

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| User Story No: 35 | Tasks: 03 | Priority: High |
| **AS A SALES REPRESENTATIVE****I WANT TO BE ABLE TO LOG AND MANAGE MY MEETINGS WITH CUSTOMERS IN THE CRMSO THAT I CAN KEEP TRACK OF MEETING NOTES AND FOLLOW-UP TASKS** |
| BV: 500 | CP: 04 |
| **Acceptance Criteria:**# Ability to log meetings, including date, time, and notes.#Integrate meeting scheduling with the CRM calendar.#Set follow-up tasks based on meeting discussions and track their completion. |

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| User Story No: 36 | Tasks: 02 | Priority: High |
| **AS A CUSTOMER SUPPORT AGENT****I WANT TO HAVE A COMPLETE CUSTOMER PROFILE AVAILABLE DURING CASE HANDLINGSO THAT I CAN PROVIDE MORE PERSONALIZED SUPPORT** |
| BV: 500 | CP: 04 |
| **Acceptance Criteria:**# Complete customer profile with past interactions, purchases, and preferences.# Display relevant details for faster case resolution.# Option to add notes or special instructions based on case handling. |

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| User Story No: 37 | Tasks: 03 | Priority: Medium |
| **AS A SALES MANAGER****I WANT TO RECEIVE PERIODIC SALES PERFORMANCE REPORTS****SO THAT I CAN EVALUATE MY TEAM’S PROGRESS AND ADJUST STRATEGIES** |
| BV: 200 | CP: 04 |
| **Acceptance Criteria:**# Reports generated weekly or monthly for team performance (e.g., conversion rates, sales volume).# Ability to filter reports by individual reps or sales segments.# Insights into performance trends and areas for improvement. |

|  |  |  |
| --- | --- | --- |
| User Story No: 38 | Tasks: 02 | Priority: High |
| **AS A SALES TEAM LEADER****I WANT TO RECEIVE REAL TIME ALERTS FOR ANY POTENTIAL DEAL LOSSES****SO THAT I CAN INTERVENE AND AVOID LOSSES** |
| BV: 500 | CP: 03 |
| **Acceptance Criteria:**# Alerts triggered by actions that suggest deal loss (e.g., long periods of inactivity, dropped lead scores).# Notifications sent to sales lead with detailed information about the potential loss.# Option to escalate the alert for manager intervention. |

|  |  |  |
| --- | --- | --- |
| User Story No: 39 | Tasks: 02 | Priority: Medium |
| **AS A CRM ADMINISTRATOR****I WANT TO UPLOAD THE REAL TIME GOOGLE LEADS****SO THAT SALES REPRESENTATIVE CAN QUICKLY CLOSE THE DEAL** |
| BV: 500 | CP: 03 |
| **Acceptance Criteria:**# Real time google leads along with customer requirement should reflect in CRM dashboard# Notifications sent to CRM administrator with detailed information of the enquiry of product requirement by the customer.# Task should be assigned to concerned sales rep with triggered as high priority. |

|  |  |  |
| --- | --- | --- |
| User Story No: 40 | Tasks: 02 | Priority: Medium |
| **AS A CRM ADMINISTRATOR****I WANT TO ENABLE ROLE-BASED ACCESS CONTROL FOR CRM FEATURES****SO THAT I CAN ENSURE USERS ONLY HAVE ACCESS TO RELEVANT DATA AND FUNCTIONALITY** |
| BV: 500 | CP: 03 |
| ***Acceptance Criteria:***# CRM permissions can be configured for different user roles (e.g., Sales Rep, Sales Manager, Admin).# Customizable access settings for different CRM modules (leads, reports, settings).# Role changes are logged for audit purposes. |

**Document 4: Agile PO Experience**

### **Product Owner Experience in Enhancement Project via Scrum Methodology**

### In my role as a **Product Owner (PO)** during an enhancementproject of sales CRM, I was responsible for driving the product vision, aligning it with market needs, and ensuring a seamless transition of features and functionalities from the legacy platform to the new platform. I worked closely with various stakeholders, including business teams, development teams, and end-users, ensuring alignment with both business goals and customer needs.

### Below are the key responsibilities and learnings from this migration project.

### **Responsibilities as Product Owner in the Enhancement Project:**

#### **1. Market Analysis**

* **Analysis of Market Need/Demand**: I conducted thorough market research to understand the current pain points, the demands for new features, and what the current sales CRM was lacking. This helped define the vision for the enhancements.
* **Availability of Similar Products in the Market**: Most of the banks and financial institutes were using this platform but all were using the old version of the same.

**2. Enterprise Analysis**

* **Due Diligence on the Opportunity**: I worked closely with business analysts and senior stakeholders to assess the financial, technical, and operational feasibility of the enhancements. This involved risk assessment and ensuring the enhancement would align with the company’s long-term strategic goals.

#### **3. Product Vision and Roadmap**

* **Product Vision**: I developed a clear product vision that balanced the need with the business goals, focusing on improving performance, scalability, and user experience on the sales CRM system.
* **Product Roadmap**: I created a high-level product roadmap with key features, milestones, and timelines for the enhancement, taking into consideration dependencies and resource availability.

#### **4. Managing Product Features**

* **Managing Stakeholder Expectations**: I kept stakeholders informed and aligned on the progress of the migration and made sure their needs were prioritized in the backlog.
* **Prioritization of Epics, Stories, and Features**: I prioritize epics, user stories, and features based on criticality, return on investment (ROI), and business value. Ensuring the most important features were addressed first to ensure a smooth migration.

#### **5. Managing Product Backlog**

* **Prioritization of User Stories**: I maintained a well-prioritized product backlog, working with stakeholders and Scrum teams to continuously adjust priorities as new information surfaced or needs evolved.
* **Reprioritization Based on Stakeholder Needs**: Throughout the migration, I ensured the backlog was continuously adjusted based on stakeholder feedback and any new regulatory or business requirements.
* **Epics Planning**: I collaborated with the Scrum Master and team to break down larger epics into smaller, actionable user stories, making sure each sprint delivered measurable value.

#### **6. Managing Overall Iteration Progress**

* **Sprint Progress Review**: I reviewed sprint progress and ensured alignment with the overall product goals. During each sprint, I actively engaged with the development team to identify blockers and ensure timely delivery.
* **Reprioritization of Sprints and Epics**: I adjusted sprint goals and epics as needed, based on progress, risk mitigation, or new information that came to light during the migration.
* **Sprint Retrospectives**: I participated in sprint retrospectives with the Scrum Master and business analysts, discussing what went well and what could be improved in future iterations to ensure the enhancement process was as smooth as possible.

### **Key Scrum Ceremonies Handled:**

* **Sprint Planning Meeting**: In each sprint planning session, I collaborated with the team to set clear goals, define the scope of work, and ensure everyone had a clear understanding of the migration tasks. This included breaking down the complex enhancement tasks into manageable stories.
* **Daily Scrum Meeting**: I attended daily stand-up meetings, where I ensured that any blockers related to the enhancement were identified and addressed in a timely manner. I was also able to re-prioritize tasks based on daily progress.
* **Sprint Review Meeting**: At the end of each sprint, I reviewed the completed features and functionalities with the stakeholders, demonstrating the progress made in enhancement to the sales CRM system and ensured it met the business requirements.
* **Sprint Retrospective Meeting**: During retrospectives, I worked with the team to reflect on the sprint, understand what went well, and discuss improvements. This feedback loop allowed us to continuously optimize our approach to enhancement.
* **Backlog Refinement Meeting**: I held regular backlog refinement sessions to ensure that the user stories were clear, concise, and aligned with the overall product vision. I worked closely with the development team to ensure that stories were well-defined and ready for future sprints.

### **User Stories Creation:**

In this project, I was deeply involved in **user story creation**, ensuring they were detailed, actionable, and aligned with both business objectives and technical feasibility. Key elements included:

* **Story No**: Unique identification for tracking.
* **Tasks**: Specific actions required to complete the story.
* **Priority**: Prioritization based on business needs and dependencies.
* **Acceptance Criteria**: Clear and concise conditions that needed to be met for the story to be considered done.
* **BV & CP Value**: Business value (BV) and complexity point (CP) were always included to ensure that each user story contributed directly to the business goals of the migration.

As the **Product Owner**, I served as the key **liaison** between various stakeholders, including business users, technical teams, and leadership. I communicated the product vision to both the Scrum team and stakeholders, ensuring everyone was informed of the product’s development, progress, and any changes in priorities.

### **Conclusion:**

The enhancement project allowed me to gain a deeper understanding of how to manage product vision, prioritize features, and collaborate with cross-functional teams using **Scrum methodology**. Through managing the product backlog, sprint progress, and stakeholder expectations, I successfully guided the project towards delivering a high-quality, scalable solution on the new platform.

**Document 5: Product and sprint backlog and product and sprint burndown charts**

**Product backlog:**

The **Product Backlog** is a prioritized list of all the work that needs to be done to improve or develop the product. It consists of **epics**, **features**, and **user stories** that describe what needs to be built, fixed, or enhanced.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Priority** | **BV** | **CP** | **Sprint** |
| 1 | AS A SALES REPRESENTATIVEI WANT TO VIEW A CUSTOMER’S PAST INTERACTIONS ACROSS ALL CHANNELSSO THAT I CAN HAVE INFORMED AND CONTEXTUAL SALES CONVERSATIONS | 3 | High | 500 | 2 | Sprint 1 |
| 2 | AS A SALES MANAGERI WANT TO TRACK INTERACTIONS OF MY SALES TEAM WITH PROSPECTSSO THAT I CAN MONITOR ENGAGEMENT AND PROVIDE COACHING IF NEEDED | 2 | High | 500 | 3 | Sprint 1 |
| 3 | AS A SALES REPRESENTATIVEI WANT TO LOG MY CUSTOMER INTERACTIONS AUTOMATICALLYSO THAT I DON’T HAVE TO ENTER THEM MANUALLY | 2 | High | 500 | 5 | Sprint 1 |
| 4 | AS A SALES TEAM LEADI WANT TO RECEIVE NOTIFICATIONS FOR KEY CUSTOMER INTERACTIONSSO THAT I CAN TAKE ACTION AT CRITICAL MOMENTS | 2 | Medium | 200 | 3 | Sprint 1 |
| 5 | AS A SALES REPRESENTATIVEI WANT TO SEE INTERACTION HISTORY WITHIN THE CRM SALES PIPELINESO THAT I CAN UNDERSTAND A LEAD’S ENGAGEMENT BEFORE FOLLOWING UP | 2 | Medium | 200 | 8 | Sprint 1 |
| 6 | AS A SALES MANAGERI WANT TO ANALYZE INTERACTION PATTERNS FOR TOP-PERFORMING SALES REPSSO THAT I CAN IDENTIFY SUCCESSFUL ENGAGEMENT STRATEGIES | 2 | Medium | 200 | 5 | Sprint 2 |
| 7 | AS A SALES MANAGERI WANT TO CREATE AUTOMATED CAMPAIGN WORKFLOWS BASED ON CUSTOMER SEGMENTSSO THAT I CAN TARGET THE RIGHT AUDIENCE WITH RELEVANT OFFERS | 2 | High | 500 | 3 | Sprint 2 |
| 8 | AS A SALES REPRESENTATIVEI WANT TO RECEIVE AUTOMATED NOTIFICATIONS ABOUT HIGHLY ENGAGED CAMPAIGN LEADSSO THAT I CAN FOLLOW UP PROMPTLY AND INCREASE CONVERSIONS | 2 | High | 500 | 5 | Sprint 2 |
| 9 | AS A CRM ADMINISTRATORI WANT TO AUTOMATE THE SCHEDULING AND EXECUTION OF MULTI-CHANNEL CAMPAIGNSSO THAT CAMPAIGNS RUN EFFICIENTLY WITH MINIMAL MANUAL INTERVENTION | 2 | High | 500 | 8 | Sprint 2 |
| 10 | AS A SALES TEAM LEADI WANT TO TRACK THE PERFORMANCE OF MY TEAM’S CAMPAIGN FOLLOW-UPSSO THAT I CAN IDENTIFY GAPS AND OPTIMIZE SALES STRATEGIES | 2 | Medium | 200 | 3 | Sprint 3 |
| 11 | AS A SALES REPRESENTATIVEI WANT TO PERSONALIZE CAMPAIGN MESSAGES BASED ON CUSTOMER INTERACTIONSSO THAT I CAN IMPROVE ENGAGEMENT AND RESPONSE RATES | 2 | Medium | 200 | 3 | Sprint 4 |
| 12 | AS A SALES TEAM MEMBERI WANT TO INTEGRATE AUTOMATED CAMPAIGNS WITH MY CRM SALES PIPELINESO THAT I CAN DIRECTLY ENGAGE WITH LEADS GENERATED FROM CAMPAIGNS | 2 | Medium | 200 | 5 | Sprint 5 |
| 13 | AS A SALES MANAGERI WANT TO MONITOR ALL SALES ACTIVITIES IN A CENTRALIZED DASHBOARDSO THAT I CAN TRACK TEAM PERFORMANCE AND IDENTIFY AREAS FOR IMPROVEMENT | 2 | High | 500 | 5 | Sprint 3 |
| 14 | AS A SALES REPRESENTATIVEI WANT MY SALES CALLS AND EMAILS TO BE AUTOMATICALLY TRACKEDSO THAT I CAN REVIEW MY INTERACTIONS WITH CUSTOMERS WITHOUT MANUAL DATA ENTRY | 2 | High | 500 | 3 | Sprint 3 |
| 15 | AS A SALES TEAM LEADI WANT TO ANALYZE SALES ACTIVITY DATA ACROSS MY TEAMSO THAT I CAN IDENTIFY TOP PERFORMERS AND COACH UNDERPERFORMING REPS | 2 | High | 500 | 5 | Sprint 3 |
| 16 | AS A CRM ADMINISTRATORI WANT TO ENSURE SALES ACTIVITIES ARE LOGGED IN REAL-TIMESO THAT THERE IS NO LOSS OF DATA OR DUPLICATE ENTRIES | 2 | Medium | 200 | 3 | Sprint 4 |
| 17 | AS A SALES REPRESENTATIVEI WANT TO RECEIVE REMINDERS FOR FOLLOW-UPS BASED ON PAST ACTIVITIESSO THAT I CAN ENGAGE CUSTOMERS AT THE RIGHT TIME TO CLOSE MORE DEALS | 2 | Medium | 200 | 3 | Sprint 5 |
| 18 | AS A SALES TEAM MEMBERI WANT TO EXPORT SALES ACTIVITY DATA INTO REPORTSSO THAT I CAN SHARE PERFORMANCE INSIGHTS WITH STAKEHOLDERS | 2 | Medium | 200 | 5 | Sprint 5 |
| 19 | AS A SALES REPRESENTATIVEI WANT TO AUTOMATE LEAD APPROVALS BASED ON PREDEFINED CRITERIASO THAT I CAN QUICKLY MOVE QUALIFIED LEADS INTO THE SALES PIPELINE | 2 | High | 500 | 8 | Sprint 4 |
| 20 | AS A SALES MANAGERI WANT TO AUTOMATE DISCOUNT APPROVALS BASED ON SET RULESSO THAT I CAN ENSURE PRICING CONSISTENCY AND REDUCE APPROVAL DELAYS | 2 | High | 500 | 5 | Sprint 4 |
| 21 | AS A CRM ADMINISTRATORI WANT TO CONFIGURE CUSTOM APPROVAL WORKFLOWSSO THAT I CAN ADAPT THE SYSTEM TO BUSINESS REQUIREMENTS WITHOUT DEPENDING ON IT TEAMS | 2 | High | 500 | 5 | Sprint 4 |
| 22 | AS A FINANCE TEAM MEMBERI WANT AUTOMATED VALIDATION OF SALES CONTRACTSSO THAT I CAN REDUCE ERRORS AND SPEED UP THE APPROVAL PROCESS | 2 | Medium | 200 | 8 | Sprint 5 |
| 23 | AS A SALES REPRESENTATIVEI WANT TO TRACK THE STATUS OF MY PENDING APPROVAL REQUESTS IN REAL TIMESO THAT I CAN FOLLOW UP AND EXPEDITE CLOSURE OF DEALS | 2 | Medium | 200 | 5 | Sprint 5 |
| 24 | AS A SALES MANAGERI WANT TO GENERATE REPORTS ON APPROVAL WORKFLOW PERFORMANCESO THAT I CAN IDENTIFY BOTTLENECKS AND IMPROVE EFFICIENCY | 2 | Medium | 200 | 3 | Sprint 5 |
| 25 | AS A CUSTOMER SUPPORT AGENTI WANT AUTOMATED CASE ASSIGNMENT BASED ON CUSTOMER PRIORITY AND ISSUE TYPESO THAT I CAN ENSURE QUICK AND RELEVANT RESPONSES TO CUSTOMER QUERIES | 2 | High | 500 | 5 | Sprint 5 |
| 26 | AS A CUSTOMERI WANT AN AUTOMATED RESPONSE SYSTEM FOR COMMON QUERIESSO THAT I CAN GET QUICK SOLUTIONS WITHOUT WAITING FOR AN AGENT | 2 | High | 500 | 3 | Sprint 5 |
| 27 | AS A CUSTOMER SUPPORT MANAGERI WANT AUTOMATED FOLLOW-UP REMINDERS FOR PENDING CUSTOMER CASESSO THAT I CAN ENSURE TIMELY ISSUE RESOLUTION AND IMPROVE CUSTOMER SATISFACTION | 2 | High | 500 | 5 | Sprint 5 |
| 28 | AS A CUSTOMER SUPPORT AGENTI WANT A PRE-BUILT RESPONSE TEMPLATES FEATURESO THAT I CAN QUICKLY RESPOND TO COMMON CUSTOMER ISSUES WITHOUT TYPING MANUALLY | 2 | Medium | 200 | 8 | Sprint 5 |
| 29 | AS A CUSTOMER SUPPORT MANAGERI WANT TO AUTOMATE CUSTOMER FEEDBACK COLLECTION AFTER ISSUE RESOLUTIONSO THAT I CAN MEASURE CUSTOMER SATISFACTION AND IMPROVE SERVICE QUALITY | 2 | Medium | 200 | 5 | Sprint 5 |
| 30 | AS A CUSTOMER SUPPORT ANALYSTI WANT REPORTING AND ANALYTICS ON AUTOMATED CUSTOMER SERVICE PROCESSESSO THAT I CAN IDENTIFY TRENDS, BOTTLENECKS, AND IMPROVEMENT OPPORTUNITIES | 2 | Medium | 200 | 3 | Sprint 5 |
| 31 | **AS A SALES REPRESENTATIVE** **I WANT** TO GET CUSTOMER SEGMENTATION RECOMMENDATIONS BASED ON BEHAVIORAL DATA**SO THAT I CAN** TARGET THE RIGHT AUDIENCES FOR MY SALES EFFORTS | 3 | Medium | 200 |  | Sprint 6 |
| 32 | **AS A SALES REPRESENTATIVE****I WANT** TO RECEIVE AI-DRIVEN PREDICTIONS ABOUT LEAD CONVERSIONS**SO THAT I CAN** FOCUS ON HIGH-PRIORITY LEADS | 2 | Medium | 200 | 3 | Sprint 6 |
| 33 | **AS A SALES REPRESENTATIVE****I WANT** TO RECEIVE AI-DRIVEN PREDICTIONS ABOUT LEAD CONVERSIONS**SO THAT I CAN** FOCUS ON HIGH-PRIORITY LEADS | 2 | Medium | 200 | 3 | Sprint 6 |
| 34 | **AS A** CRM ADMINISTRATOR**I WANT** TO ENABLE LEAD SCORING BASED ON MULTIPLE DATA POINTS**SO THAT** SALES REPS CAN PRIORITIZE LEADS MORE EFFECTIVELY | 2 | Medium | 200 | 3 | Sprint 6 |
| 35 | **AS A** SALES REPRESENTATIVE**I WANT** TO BE ABLE TO LOG AND MANAGE MY MEETINGS WITH CUSTOMERS IN THE CRM**SO THAT** I CAN KEEP TRACK OF MEETING NOTES AND FOLLOW-UP TASKS | 4 | High | 500 | 3 | Sprint 6 |
| 36 | **AS A** CUSTOMER SUPPORT AGENT**I WANT** TO HAVE A COMPLETE CUSTOMER PROFILE AVAILABLE DURING CASE HANDLING**SO THAT** I CAN PROVIDE MORE PERSONALIZED SUPPORT | 2 | High | 500 | 3 | Sprint 6 |
| 37 | **AS A** SALES MANAGER**I WANT** TO RECEIVE PERIODIC SALES PERFORMANCE REPORTS**SO THAT** I CAN EVALUATE MY TEAM’S PROGRESS AND ADJUST STRATEGIES | 3 | Medium | 200 | 3 | Sprint 7 |
| 38 | **AS A** SALES TEAM LEADER**I WANT** TO RECEIVE REAL TIME ALERTS FOR ANY POTENTIAL DEAL LOSSES**SO THAT** I CAN INTERVENE AND AVOID LOSSES | 3 | High | 500 | 3 | Sprint 7 |
| 39 | **AS A** CRM ADMINISTRATOR**I WANT** TO UPLOAD THE REAL TIME GOOGLE LEADS**SO THAT** SALES REPRESENTATIVE CAN QUICKLY CLOSE THE DEAL | 2 | Medium | 200 | 3 | Sprint 7 |
| 40 | **AS A** CRM ADMINISTRATOR**I WANT** TO ENABLE ROLE-BASED ACCESS CONTROL FOR CRM FEATURES**SO THAT** I CAN ENSURE USERS ONLY HAVE ACCESS TO RELEVANT DATA AND FUNCTIONALITY | 2 | Medium | 200 | 3 | Sprint 7 |

**Sprint-1 Backlog**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Owner** | **Status** | **Estimated Effort** |
| 1 | AS A SALES REPRESENTATIVE: I WANT TO VIEW A CUSTOMER’S PAST INTERACTIONS ACROSS ALL CHANNELS | 3 | dev1 | Not Started | 2 |
| 2 | AS A SALES MANAGER: I WANT TO TRACK INTERACTIONS OF MY SALES TEAM WITH PROSPECTS | 2 | dev2 | Not Started | 3 |
| 3 | AS A SALES REPRESENTATIVE: I WANT TO LOG MY CUSTOMER INTERACTIONS AUTOMATICALLY | 2 | dev3 | Not Started | 5 |
| 4 | AS A SALES TEAM LEAD: I WANT TO RECEIVE NOTIFICATIONS FOR KEY CUSTOMER INTERACTIONS | 2 | dev1 | Not Started | 3 |
| 5 | AS A SALES REPRESENTATIVE: I WANT TO SEE INTERACTION HISTORY WITHIN THE CRM SALES PIPELINE | 2 | dev2 | Not Started | 8 |

**Sprint-2 Backlog**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Owner** | **Status** | **Estimated Effort** |
| 6 | AS A SALES MANAGER: I WANT TO ANALYZE INTERACTION PATTERNS FOR TOP-PERFORMING SALES REPS | 2 | dev3 | Not Started | 5 |
| 7 | AS A SALES MANAGER: I WANT TO CREATE AUTOMATED CAMPAIGN WORKFLOWS BASED ON CUSTOMER SEGMENTS | 2 | dev1 | Not Started | 3 |
| 8 | AS A SALES REPRESENTATIVE: I WANT TO RECEIVE AUTOMATED NOTIFICATIONS ABOUT HIGHLY ENGAGED CAMPAIGN LEADS | 2 | dev2 | Not Started | 5 |
| 9 | AS A CRM ADMINISTRATOR: I WANT TO AUTOMATE THE SCHEDULING AND EXECUTION OF MULTI-CHANNEL CAMPAIGNS | 2 | dev3 | Not Started | 8 |
| 13 | AS A SALES MANAGER: I WANT TO MONITOR ALL SALES ACTIVITIES IN A CENTRALIZED DASHBOARD | 2 | dev1 | Not Started | 5 |

**Sprint-3 Backlog**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Owner** | **Status** | **Estimated Effort** |
| 10 | AS A SALES TEAM LEAD: I WANT TO TRACK THE PERFORMANCE OF MY TEAM’S CAMPAIGN FOLLOW-UPS | 2 | dev2 | Not Started | 3 |
| 14 | AS A SALES REPRESENTATIVE: I WANT MY SALES CALLS AND EMAILS TO BE AUTOMATICALLY TRACKED | 2 | dev3 | Not Started | 3 |
| 15 | AS A SALES TEAM LEAD: I WANT TO ANALYZE SALES ACTIVITY DATA ACROSS MY TEAM | 2 | dev1 | Not Started | 5 |
| 13 | AS A SALES MANAGER: I WANT TO MONITOR ALL SALES ACTIVITIES IN A CENTRALIZED DASHBOARD | 2 | dev2 | Not Started | 5 |
| 14 | AS A SALES REPRESENTATIVE: I WANT MY SALES CALLS AND EMAILS TO BE AUTOMATICALLY TRACKED | 2 | dev3 | Not Started | 3 |

**Sprint-4 backlog**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Owner** | **Status** | **Estimated Effort** |
| 19 | AS A SALES REPRESENTATIVE: I WANT TO AUTOMATE LEAD APPROVALS BASED ON PREDEFINED CRITERIA | 2 | dev1 | Not Started | 8 |
| 20 | AS A SALES MANAGER: I WANT TO AUTOMATE DISCOUNT APPROVALS BASED ON SET RULES | 2 | dev2 | Not Started | 5 |
| 21 | AS A CRM ADMINISTRATOR: I WANT TO CONFIGURE CUSTOM APPROVAL WORKFLOWS | 2 | dev3 | Not Started | 5 |
| 16 | AS A CRM ADMINISTRATOR: I WANT TO ENSURE SALES ACTIVITIES ARE LOGGED IN REAL-TIME | 2 | dev1 | Not Started | 3 |
| 11 | AS A SALES REPRESENTATIVE: I WANT TO PERSONALIZE CAMPAIGN MESSAGES BASED ON CUSTOMER INTERACTIONS | 2 | dev2 | Not Started | 3 |

**Sprint -5 backlog**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Owner** | **Status** | **Estimated Effort** |
| 22 | AS A FINANCE TEAM MEMBER: I WANT AUTOMATED VALIDATION OF SALES CONTRACTS | 2 | dev3 | Not Started | 8 |
| 23 | AS A SALES REPRESENTATIVE: I WANT TO TRACK THE STATUS OF MY PENDING APPROVAL REQUESTS IN REAL TIME | 2 | dev1 | Not Started | 5 |
| 24 | AS A SALES MANAGER: I WANT TO GENERATE REPORTS ON APPROVAL WORKFLOW PERFORMANCE | 2 | dev2 | Not Started | 3 |
| 25 | AS A CUSTOMER SUPPORT AGENT: I WANT AUTOMATED CASE ASSIGNMENT BASED ON CUSTOMER PRIORITY AND ISSUE TYPE | 2 | dev3 | Not Started | 5 |
| 26 | AS A CUSTOMER: I WANT AN AUTOMATED RESPONSE SYSTEM FOR COMMON QUERIES | 2 | dev1 | Not Started | 3 |

**Sprint Burndown Chart:**



**Sprint Burnup Chart:**



**Sprint 1**: Focuses on building the core features of the CRM system (e.g., daily dashboard for sales reps, lead assignment automation, and detailed customer profiles).

**Sprint 2**: Focuses on implementing key analytics and reporting features (e.g., custom reports for managers, sales forecasting, and KPI tracking).

**Sprint 3**: Includes mobile CRM access, user permissions, and automated notifications.

**Document 6: Sprint Meetings**

**Meeting Type 1: Sprint Planning Meeting**

|  |  |
| --- | --- |
| **Date** | February 5, 2025 |
| **Time** | 10:00 AM – 12:00 PM |
| **Location** | Virtual (Zoom link) |
| **Prepared By** | Akanksha (PO) |
| **Attendees** |  Scrum Master, Developers, Product Owner |

**Agenda Topics**

|  |  |  |  |
| --- | --- | --- | --- |
| **Topic** | **Presenter** | **Time Allotted** | **Details** |
| Sprint Goal Definition | Akanksha (PO)  | 30 min | The PO proposes a sprint goal based on the top priority user stories. The team collaboratively refines and agrees on the goal. |
| User Story Selection | Akanksha (PO) | 15 min | The PO presents prioritized user stories. The team discusses each story, clarifies acceptance criteria, and selects user stories based on capacity. |
| Task Breakdown | Development Team | 30 min | The team breaks down each selected user story into smaller, actionable tasks. Example: |
| Task Estimation | Development Team | 30 min | The team estimates the effort required for each task, ideally using story points or hours. |
| Sprint Backlog Creation | Development Team | 15 min | The selected user stories, their associated tasks, and estimations form the Sprint Backlog. |

**Other Information**

|  |  |
| --- | --- |
| Observers | Mr. ABC,  |
| Resources | Developers, testers, Budget amt (1cr.)  |
| Special Notes | NA |

**Meeting Type 2: Sprint review meeting**

|  |  |
| --- | --- |
| **Date** | Feb 15, 2025 |
| **Time** | 10:00 AM – 12:00 PM |
| **Location** | Virtual (Zoom link) |
| **Prepared By** | Akanksha (PO) |
| **Attendees** | Scrum Master, Developers(4), Product Owner |

|  |  |  |  |
| --- | --- | --- | --- |
| **Sprint Status** | **Things to Demo** | **Quick Updates** | **What’s Next** |
| 1.Completed **Interaction Tracking** user stories | Demo of interaction tracking functionality, including data capture and retrieval. | Stakeholders provide feedback on UI and data accuracy. | Adjustments based on feedback; move to Sprint 2 for **Campaign Management** and further **Interaction Tracking**. |
| 2.Completed **Campaign Management** and **Interaction Tracking**  | Demo of campaign creation and tracking features. | Stakeholders suggest UI improvements for campaign reporting. | Implement improvements in Sprint 3; introduce **Activity Tracking** features. |

**Meeting Type 3- Sprint Retrospective Meeting**

|  |  |
| --- | --- |
| **Date** | 09/02/2025 |
| **Time** | 12.00 noon |
| **Location** | Virtual |
| **Prepared By** | Akanksha (PO) |
| **Attendees** | PO, Scrum Master, Development Team |
| **Agenda** | **What Went Well** | **What Didn’t Go Well** | **Questions** | **Reference** |
| Interaction Tracking Development | Successfully implemented core tracking features. | UI challenges in data visualization. | How can we improve UI design for better usability? | Sprint 1 Backlog & Feedback |

**Sprint-2 Retrospective**

|  |  |
| --- | --- |
| **Date** | 17-02-25 |
| **Time** | 12.00 noon |
| **Location** | Virtual |
| **Prepared By** | Akanksha (PO) |
| **Attendees** | PO, Scrum Master, Development Team |
| **Agenda** | **What Went Well** | **What Didn’t Go Well** | **Questions** | **Reference** |
| Campaign Management & Interaction Tracking Enhancements | Campaign workflows were implemented as planned. | Some performance issues in handling large datasets. | How can we optimize database queries for better performance? | Sprint 2 Execution Notes |

**4. Daily Scrum (Daily Stand-up)**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|   | **Question Name/Role** | **Monday** | **Tuesday** | **Wednesday** | **Thursday** | **Friday** | **Monday** | **Tuesday** |
| What did you do yesterday? | **Developer 1** | Designed database schema for customer interactions. | Developed API for interaction retrieval. | Started UI implementation for interaction history. | Completed UI for interaction history. | Fixed UI bugs and integrated API. | Wrote unit tests for API and UI. | Code review and documentation. |
| **Developer 2** | Worked on campaign workflow backend. | Developed campaign automation rules. | Integrated campaign rules with CRM. | Debugged campaign logic. | Improved performance of campaign processing. | Worked on automated testing. | Prepared for Sprint Review. |
| What will you do today? | **Developer 1** | Develop API endpoint for data logging. | Enhance UI design for better visibility. | Work on interaction analytics. | Optimize API response time. | Finalize UI and API integration. | Validate test cases. | Document learnings and prepare demo. |
| **Developer 2** | Implement notification feature for campaigns. | Debug campaign notification issues. | Develop UI for campaign notifications. | Test campaign automation scenarios. | Final campaign performance tuning. | Sprint finalization. | Present demo in Sprint Review. |
| **Developer 3** | Work on edge cases for workflow approvals. | Debug UI inconsistencies. | Test different approval scenarios. | Implement role-based workflow access. | Final bug fixes and optimizations. | Code freeze and testing. | Retrospective discussion preparation. |
| What (if anything) is blocking your progress? | **Developer 1** | API response time needs improvement. | Need feedback on UI implementation. | Dependent on backend API changes. | Waiting for UI testing feedback. | No blockers. | No blockers. | No blockers. |
| **Developer 2** | Campaign automation rules need PO approval. | Backend processing is slow. | Need test data for validation. | Pending integration test results. | No blockers. | No blockers. | No blockers. |
| **Developer 3** | Approval workflow logic needs review. | API is returning incorrect status. | Need database migration script approval. | Performance issue in workflow handling. | No blockers. | No blockers. | No blockers. |