# 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-**

|  |  |  |
| --- | --- | --- |
| **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.

|  |  |  |  |
| --- | --- | --- | --- |
| **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**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| User Story No : 1 | | Tasks : 02 | | Priority : High |
| AS A USER  I WANT TO LOGIN TO SALES CRM  SO THAT I VIEW CUSTOMER DATA | | | | |
| BV : 500 | | | CP : 01 | |
| ACCEPTANCE CRITERIA :  Login screen  Text boxes for user name, password  Click on Login Button  User Lands in to home page | | | | |
| User Story No : 2 | Tasks : 02 | | Priority : High |
| AS A USER  I WANT TO SEARCH CUSTOMER  SO THAT I VIEW CUSTOMER DETAILS | | | |
| BV : 500 | | CP : 02 | |
| ACCEPTANCE CRITERIA :  Display search criteria, Account No, Mobile No, Email ID, Cust ID, Pan No  Select Criteria | | | |
| User Story No : 3 | Tasks : 02 | | Priority : High |
| AS A SALES REPRESENTATIVE  I WANT TO LOG CALL AUTOMATICALLY  SO THAT I CALL WITH REFLECT IN SYSTEM WITHOUT MANUAL ENTRY | | | |
| BV : 500 | | CP : 03 | |
| ACCEPTANCE CRITERIA :  CRM automatically logs calls once a call is completed.  The logged data includes details such as the call’s duration, time, and associated customer information. | | | |
|  |  |  |  |
| User Story No : 4 | Tasks : 02 | | Priority : Medium |
| AS A SALES REPRESENTATIVE  I WANT TO GET ALL THE DETAILS OF CUSTOMER AT ONE PLACE  SO THAT I CAN QUICKLY UNDERSTAND THE CUSTOMER’S NEEDS AND CAN OFFER BEST SERVICE. | | | |
| BV : 200 | | CP : 05 | |
| ACCEPTANCE CRITERIA :  Customer profiles are synced in real-time with the customer servicing software.  TRV, and pre-approved offers are displayed correctly in the CRM.  No discrepancies between CRM data and customer servicing software. | | | |
| User Story No : 5 | Tasks : 02 | | Priority : High |
| AS A SALES REPRESENTATIVE  I WANT A ONE CLICK OPTION TO VIEW A FULL CUSTOMER PROFILE  SO THAT I CAN EASILY ACCESS CRITICAL INFORMATION TO TAILOR MY CONVERSATION AND OFFER THE BEST SOLUTIONS/ PRODUCTS. | | | |
| BV : 200 | | CP : 08 | |
| ACCEPTANCE CRITERIA :  A button is available to display a comprehensive customer profile with all necessary details (TRV, ongoing loans, etc.).  Information is displayed clearly in a single view.  Data is up-to-date with no need for manual updates. | | | |
|  |  |  |  |
| User Story No : 6 | Tasks : 02 | | Priority : Low |
| AS A SALES REPRESENTATIVE  I WANT TO CRM TO WORK SMOOTHLY ON MY MOBILE DEVICE  SO THAT I CAN ACESS CUSTOMER’S DATA AND UPDATE DETAILS AS PER MY CONVENIENCE | | | |
| BV : 100 | | CP : 13 | |
| ACCEPTANCE CRITERIA :  CRM is fully functional on iOS and Android devices.  Key features (customer data, sales pipeline, tasks) are available on mobile.  Updates made on mobile reflect instantly across the platform. | | | |
|  |  |  |  |
| User Story No : 7 | Tasks : 02 | | Priority : Medium |
| AS A SALES MANAGER I WANT TO VIEW REAL TIME REPORTS ON SALES PERFORMANCE  SO THAT I CAN QUICKLY IDENTIFY ISSUES AND TRACK TEAM PROGRESS | | | |
| BV : 200 | | CP : 21 | |
| ACCEPTANCE CRITERIA :  Reports are updated in real-time with no significant delays.  Sales data such as conversion rates, lead progress, and pipeline status are visible.  Managers can export reports in various formats (e.g., PDF, CSV). | | | |
|  |  |  |  |
| User Story No : 8 | Tasks : 02 | | Priority : Medium |
| AS AN IT ADMIN/USER  I WANT TO INTREGRATE THE SYSTEM WITH OTHER THIRD PARTY SYSTEMS VIA APIs  SO THAT I CAN ENSURE ALL SYSTEMS ARE WORKING IN SYNC AND DATA FLOWS SMOOTHLY ACROSS PLATFORMS | | | |
| BV : 200 | | CP : 34 | |
| ACCEPTANCE CRITERIA :  The CRM can connect to at least 3 third-party systems.  Data syncs between the CRM and external tools with no errors.  The system handles integration without a negative impact on CRM performance. | | | |
|  |  |  |  |
| User Story No : 9 | Tasks : 02 | | Priority :HIGH |
| AS AN IT ADMIN/USER  I WANT THE CRM TO COMPLY WITH DATA PROTECTION REGULATIONS AND ENSURE DATA SECURITY.  SO THAT I CAN PROTECT CUSTOMER DATA AND AVOID LEGAL RISKS FOR THE COMPANY | | | |
| BV : 100 | | CP : 55 | |
| ACCEPTANCE CRITERIA :  CRM complies with relevant regulations.  Customer data is encrypted in both storage and transit.  Audit trails are available for tracking access to sensitive data. | | | |
|  |  |  |  |
| User Story No : 10 | Tasks : 02 | | Priority :High |
| AS AN IT ADMIN/USER  I WANT TO ADD NOTES TO A CUSTOMER PROFILE  SO THAT I CAN DOCUMENT IMPORTANT INTERACTIONS OR FOLLOW-UPS | | | |
| BV : 100 | | CP : 89 | |
| ACCEPTANCE CRITERIA :  Text box for adding notes to a customer’s profile  Save button to store notes  Notes displayed on the customer profile page | | | |

**Document 4: Agile PO Experience**

### **Product Owner Experience in a Platform Migration 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.

In the case of the **Sales CRM Enhancement Project**, the **Product Backlog** might include various high-level goals, like improving user experience, enhancing sales reporting, integrating new data sources, or adding automation features.

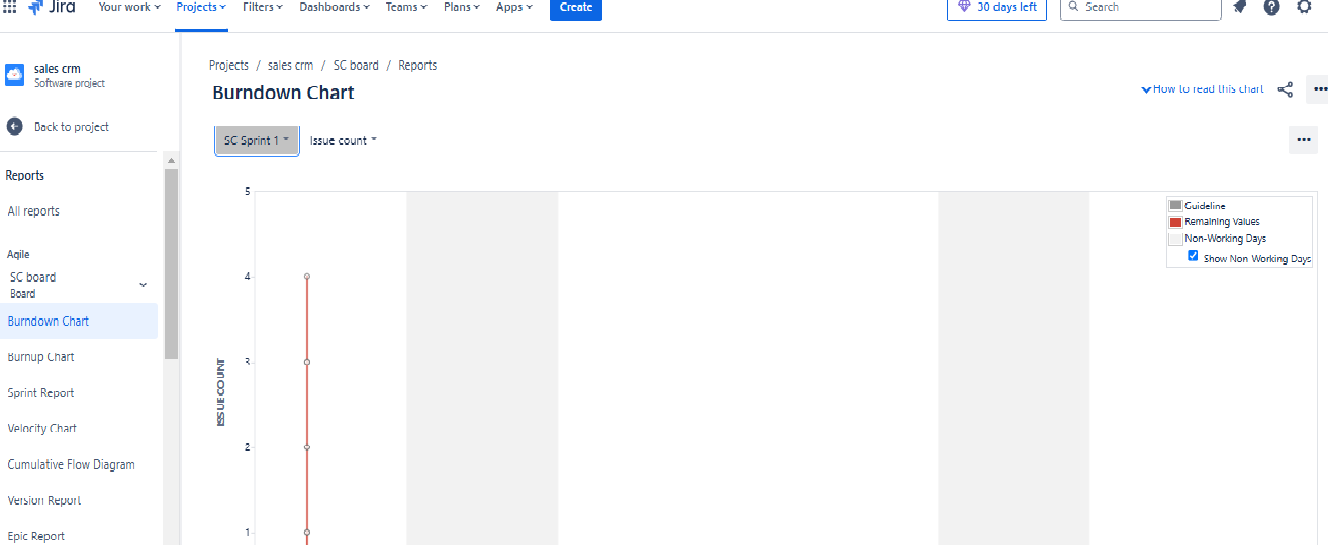
|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| User story ID | User story | Tasks | Priority | BV | CP | Sprint |
| US-001 | As a Sales Rep, I want to view my daily sales activity dashboard, so that I can track my performance. | 1. Design Sales Rep Dashboard UI 2. Integrate CRM data with dashboard 3. Implement filter options | High | 500 | 3 | Sprint 1 |
| US-002 | As a Sales Manager, I want to generate custom reports on sales performance, so that I can make data-driven decisions. | 1. Define report parameters 2. Design report layout 3. Implement report generation functionality | High | 500 | 3 | Sprint 1 |
| US-003 | As a Sales Rep, I want automated lead assignment based on regions, so that I can focus on selling instead of manual work. | 1. Define lead assignment criteria 2. Implement automatic lead assignment system 3. Test automation | High | 500 | 2 | Sprint 1 |
| US-004 | As a Sales Rep, I want to access the CRM on my mobile device, so that I can work on-the-go. | 1. Design mobile-friendly UI 2. Develop mobile CRM app 3. Test mobile CRM features | Medium | 200 | 3 | Sprint 3 |
| US-005 | As a Sales Manager, I want to see real-time sales forecasts, so that I can better plan my sales strategies. | 1. Create sales forecast algorithm 2. Display forecast data in dashboard 3. Integrate with CRM database | High | 400 | 4 | Sprint 2 |
| US-006 | As a Sales Rep, I want to view detailed customer profiles, so that I can have context for my sales interactions. | 1. Develop customer profile page 2. Integrate with CRM database 3. Display customer history & activity | High | 500 | 3 | Sprint 1 |
| US-007 | As an IT Admin, I want to set user permissions for sales reps, so that we can manage access to sensitive data. | 1. Define user roles and permissions 2. Implement access control mechanism 3. Test user access features | Medium | 200 | 2 | Sprint 3 |
| US-008 | As a Sales Rep, I want to track customer interactions (calls, emails, meetings), so that I can have a record of my engagement. | 1. Design interaction logging UI 2. Integrate with CRM database 3. Test interaction tracking functionality | High | 400 | 4 | Sprint 2 |
| US-009 | As a Sales Manager, I want to track KPIs like conversion rates and sales cycle, so that I can assess team performance. | 1. Define KPI metrics 2. Implement KPI tracking dashboard 3. Display KPI reports in manager's dashboard | High | 400 | 3 | Sprint 2 |
| US-010 | As a Sales Rep, I want to receive automated notifications about lead updates and deadlines, so that I can follow up promptly. | 1. Create notification system 2. Integrate notifications with CRM 3. Test automated notifications system | Medium | 200 | 2 | Sprint 3 |

**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. |