AGILE DOCUMENTS – CRM TOOL

Document -1 Definition of done

**User Story Level**

Produced Code for Presumed Functionalities:

* Code is written to implement the required CRM features, including customer management, lead tracking, and sales pipeline visualization.
* Features like notifications, reports, and dashboards are functional.

 Assumptions of User Story Met:

* User stories are validated to ensure customer needs are met (e.g., accurate customer data storage, lead progress tracking).
* Business logic and rules are applied as per user story acceptance criteria.

 Project Builds Without Errors:

* The code compiles successfully without errors or warnings using the build pipeline.

 Unit Tests Written and Passing:

* Unit tests are created for core CRM functions (e.g., lead creation, task assignment, deal closing).
* All unit tests are executed, achieving a minimum 90% code coverage.

**2️⃣ Sprint Level**

 Project Deployed on the Test Environment Identical to Production Platform:

* The CRM is deployed to a staging environment using the same infrastructure and configurations as the production environment.

 Tests on Devices/Browsers Listed in Project Assumptions Passed:

* Features are tested on all supported browsers (e.g., Chrome, Edge, Firefox) and devices (desktop, tablet, mobile).
* Cross-browser compatibility is ensured.

 Feature Ok-ed by UX Designer:

* UI/UX is verified against approved wireframes and prototypes.
* User experience is aligned with design guidelines and provides a seamless experience.

 QA Performed & Issues Resolved:

* Comprehensive testing (functional, UI, integration, and regression) is conducted.
* Critical and high-priority bugs are resolved, and QA has approved the feature.

 Feature is Tested Against Acceptance Criteria:

* All acceptance criteria defined in the user story are validated using test cases.
* Both functional and non-functional requirements are tested.

 Feature Ok-ed by Product Owner:

* Product Owner reviews and confirms the functionality matches business expectations.
* Acceptance criteria are signed off.

**3️⃣ Release Level**

 Refactoring Completed:

* Code is refactored to improve readability, maintainability, and performance.
* Unused or redundant code is removed.

 Any Configuration or Build Changes Documented:

* All configuration changes (e.g., environment variables, database schema updates) are recorded in the project documentation.

 Documentation Updated:

* User guides, API documentation, and internal system documentation are updated.
* Release notes highlighting new features, improvements, and bug fixes are prepared.

 Peer Code Review Performed:

* Code has been reviewed by at least one other developer to ensure it follows coding standards.
* Feedback is addressed, and all required changes are implemented.

Document 2- Product Vision

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| Scrum project Name: | CRM Solution for Enhanced Customer Management |
| Venue | Microsoft Teams (Virtual) |
| Date: March 25, 2025 | Start Time: 10:00 AM | End Time: 4:00 PM | Duration: 6 Hours |
| Client: | ABC Enterprises |
| Stakeholder List: | * Business Owners (CEO, COO):
* Sales Managers:
* Customer Support Managers:
* Marketing Team Leads:
* IT and Development Managers:
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| Scrum Team |
| Scrum Master: | Priya SharmaRajesh VermaAnkit MehtaNeha JoshiRohit MalhotraPooja SinghSameer Khan |
| Product owner: |
| Scrum Developer 1: |
| Scrum Developer 2: |
| Scrum Developer 3: |
| Scrum Developer 4: |
| Scrum Developer 5: |

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| **Vision:** To deliver a user-friendly, scalable CRM solution that centralizes customer interactions, enhances sales tracking, and optimizes customer support. The goal is to provide actionable insights, streamline operations, and ensure customer satisfaction. |
| Target Group | Needs | Product | Value |
| Which market segment does the product address?* SMEs (Small and Medium Enterprises)
* Large Enterprises with dedicated sales and support teams
* E-commerce and Service-Based Companies

Who are the target users and customers?* Sales Representatives and Managers
* Customer Support Agents
* Marketing Executives
* Business Decision-Makers
 | What problem does the product solve?* Disorganized customer data across different systems
* Lack of visibility into the sales pipeline
* Inefficient lead management and poor follow-ups
* Delayed customer support responses

Which benefits does it provide?* Centralized customer data management
* Real-time sales tracking and reporting
* Improved customer support through ticket management
* Predictive insights using AI analytics
 | What product is it?* A cloud-based CRM platform with mobile and desktop accessibility.

What makes it desirable and special?* Intuitive dashboard with customizable views
* Seamless integration with third-party apps (e.g., email, calendar, ERP systems)
* AI-powered customer insights for predictive sales analysis

Is it feasible to develop the product?* Yes, using Agile development, it will be built in iterative sprints with regular stakeholder feedback.
 | How is the product going to benefit the company?* Improve sales conversion rates by 30% within six months.
* Enhance customer support response times by 40%.
* Provide data-driven insights for faster decision-making.

What are the business goals?* Increase revenue through better sales tracking.
* Improve customer retention with proactive support.
* Reduce operational costs by automating tasks.

What is the business model?* Subscription-based pricing with different tiers for small, medium, and large businesses.
* Additional revenue from premium features like advanced analytics and AI predictions.
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Document 3: User stories

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| User story No:1 Customer Management | Tasks: * Develop a customer profile creation form.
* Implement search and filter functionality.
* Enable customer data updates and deletions.
 | Priority:High |
| Value Statement:As a Sales Representative,I want to add, view, edit, and delete customer profiles,so that I can maintain an up-to-date and accurate customer database. |
| BV: 90CP: 8 |
| Acceptance Criteria:* Users can add, search, edit, and delete customer profiles.
* Data validation ensures accurate input.
* Only authorized users can manage profiles.
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| User story No:2 Lead Management | Tasks: Lead Creation, Assignment, Status Tracking, Notifications | Priority:High |
| Value Statement:As a Sales Manager, I want to manage and assign leads to team members so that I can ensure timely follow-ups and close deals efficiently. |
| BV: 85CP: 7 |
| Acceptance Criteria:* Leads can be created and assigned to team members.
* Notifications are sent for status updates.
* Leads progress through defined pipeline stages.
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| User story No:3 Sales Pipeline Management | Tasks: Visual Pipeline, Drag-and-Drop, Filters | Priority:High |
| Value Statement:As a Sales Representative, I want to track my leads using a visual sales pipeline so that I can focus on high-priority opportunities. |
| BV: 95CP: 9 |
| Acceptance Criteria:* Leads are visible on a drag-and-drop pipeline.
* Pipeline stages are customizable.
* Data is filtered by status, priority, or date.
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| User story No:4 Task Management | Tasks: Task Creation, Assignment, Reminders, Tracking | Priority:Medium |
| Value Statement:As a Sales Representative, I want to create and manage tasks so that I can ensure timely completion of my responsibilities. |
| BV: 75CP: 5 |
| Acceptance Criteria:* Users can create, assign, and edit tasks.
* Reminders are sent for upcoming deadlines.
* Task status is updated in real-time.
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| User story No:5 Contact Management | Tasks: Add Contacts, Import/Export, Bulk Actions | Priority:Medium |
| Value Statement:As a Sales Representative, I want to manage contacts effectively so that I can maintain proper communication with customers. |
| BV: 80CP: 6 |
| Acceptance Criteria:* Contacts can be added, edited, or deleted.
* Bulk import and export options are available.
* Duplicate contacts are flagged.
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| User story No:6 Reporting and Analytics | Tasks: Create Reports, Visualize Data, Export Report | Priority:High |
| Value Statement:As a Sales Manager, I want to generate reports and view performance metrics so that I can make data-driven decisions. |
| BV: 100CP: 8 |
| Acceptance Criteria:* Users can generate custom reports.
* Reports are available in visual formats.
* Reports can be exported as PDFs or Excel files.
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| User story No:7 Notification System | Tasks: Real-Time Notifications, Preferences Management | Priority:Medium |
| Value Statement:As a Sales Representative, I want to receive notifications for lead updates and task deadlines so that I can respond promptly. |
| BV: 70CP: 4 |
| Acceptance Criteria:* Notifications are received in real-time.
* Users can customize notification settings.
* Notifications are available via email and in-app.
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| User story No:8 User Role Management | Tasks: Role Creation, Permission Assignment, Admin Control | Priority:High |
| Value Statement:As an Admin, I want to manage user roles and permissions so that I can ensure data security and access control. |
| BV: 95CP: 7 |
| Acceptance Criteria:* Users are assigned roles with specific permissions.
* Admin can add, edit, or delete roles.
* Role changes are effective immediately.
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| User story No:9 Integration with Third-Party Tools | Tasks: Email and Calendar Sync, API Integration | Priority:Medium |
| Value Statement:As a Sales Representative, I want to sync my calendar and emails with the CRM so that I can track customer interactions efficiently. |
| BV: 80CP: 10 |
| Acceptance Criteria:* Users can integrate their email accounts with the CRM.
* Calendar events are synced.
* Third-party API connections are available.
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| User story No:10 Customer Support Ticketing | Tasks: Ticket Creation, Assignment, Status Tracking | Priority:High |
| Value Statement:As a Support Agent, I want to manage customer tickets so that I can resolve issues quickly and improve customer satisfaction. |
| BV: 90CP: 8 |
| Acceptance Criteria:* Tickets can be created, assigned, and tracked.
* Support agents receive notifications for new tickets.
* Ticket status updates are reflected in real-time
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Document 4: Agile PO Experience

My Experience as a Product Owner for the CRM Tool Project

1. Market Analysis

As a Product Owner, I conducted a comprehensive market analysis to evaluate the demand for a CRM tool tailored to our target audience. My responsibilities included:

* Assessing market needs and identifying gaps in the current CRM landscape.
* Conducting competitor analysis to benchmark features and understand unique selling points.
* Gathering insights from industry trends and customer feedback to determine key functionalities.

2. Enterprise Analysis

I performed due diligence on the market opportunity by collaborating with stakeholders and understanding the specific requirements of various departments. This helped in:

* Evaluating the feasibility of the product.
* Estimating the ROI for different features.
* Aligning the CRM tool's objectives with business goals.

3. Product Vision and Roadmap

I defined the product vision by considering both the market need and internal business objectives. Key responsibilities included:

* Creating a clear, actionable vision statement.
* Developing a high-level product roadmap that outlined major milestones, features, and release timelines.
* Ensuring stakeholder alignment through continuous feedback and iterative updates.

4. Managing Product Features

My role involved defining and managing product features by:

* Collaborating with stakeholders to capture feature requests and expectations.
* Prioritizing features based on business impact, ROI, and technical feasibility.
* Continuously refining the product backlog to reflect changing priorities and market needs.

5. Managing Product Backlog

I ensured the backlog was well-structured and prioritized using Scrum principles. Responsibilities included:

* Breaking down high-level epics into user stories with clear acceptance criteria.
* Conducting backlog refinement meetings to reprioritize items based on feedback.
* Collaborating with the Scrum team to ensure clarity and alignment on sprint goals.

6. Managing Overall Iteration Progress

To ensure smooth progress during sprints, I actively participated in:

* Sprint progress reviews to track deliverables and address challenges.
* Reprioritizing sprints and epics based on stakeholder feedback.
* Sprint retrospective meetings to gather insights and apply improvements.

Sprint Management Experience

I led and managed various sprint meetings to foster collaboration and ensure successful deliveries:

* Sprint Planning Meeting: Defined sprint goals, prioritized backlog items, and estimated story points with the team.
* Daily Scrum Meeting: Ensured clear communication, identified roadblocks, and maintained alignment on progress.
* Sprint Review Meeting: Demonstrated completed work to stakeholders for feedback and validation.
* Sprint Retrospective Meeting: Facilitated discussions to identify successes, challenges, and opportunities for process improvement.
* Backlog Refinement Meeting: Reviewed and prioritized backlog items, ensuring user stories were well-defined and ready for future sprints.

User Story Creation Experience

In this project, I created detailed user stories, ensuring they captured the business value and aligned with the project goals. Each user story included:

* Story Number: Unique identification for tracking.
* Tasks: Clearly defined development and testing activities.
* Priority: Classification based on business impact (High, Medium, Low).
* Acceptance Criteria: Objective measures to determine when a story is complete.
* BV (Business Value): A numeric value representing the expected benefit to the business.
* CP (Critical Path): A numeric value reflecting its impact on project completion.

Conclusion:

As the Product Owner, I served as a key liaison between stakeholders and the development team. I ensured that the CRM tool's development aligned with business goals, met customer needs, and delivered value. By maintaining transparent communication, prioritizing effectively, and managing product features strategically, I contributed to the successful development and delivery of the CRM tool.

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

**Product backlog:**

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| User story ID | User Story | Tasks | priority | BV | CP | Sprint |
| 1 | Customer Management | Develop, Search, Edit, Delete Customer Profiles | High | 90 | 8 | Sprint 1 |
| 2 | Lead Management | Lead Creation, Assignment, Status Tracking | High | 85 | 7 | Sprint 1 |
| 3 | Sales Pipeline Management | Visual Pipeline, Drag-and-Drop, Filters | High | 95 | 9 | Sprint 2 |
| 4 | Task Management | Task Creation, Assignment, Reminders, Tracking | Medium | 75 | 5 | Sprint 2 |
| 5 | Contact Management | Add Contacts, Import/Export, Bulk Actions | Medium | 80 | 6 | Sprint 3 |
| 6 | Reporting and Analytics | Create Reports, Visualize Data, Export Reports | High | 100 | 8 | Sprint 3 |
| 7 | Notification System | Real-Time Notifications, Preferences Management | Medium | 70 | 4 | Sprint 4 |
| 8 | User Role Management | Role Creation, Permission Assignment, Admin Control | High | 95 | 8 | Sprint 4 |
| 9 | Integration with Third-Party Tools | Email and Calendar Sync, API Integration | Medium | 80 | 10 | Sprint 5 |
| 10 | Customer Support Ticketing | Ticket Creation, Assignment, Status Tracking | High | 90 | 7 | Sprint 5 |

**Sprint backlog:**

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| User story ID | User Story | Tasks | Owner | status | Estimation Efforts |
| 1 | Customer Management | Develop, Search, Edit, Delete Customer Profiles | Dev Team1 | In progress  | 10 Days |
| 2 | Lead Management | Lead Creation, Assignment, Status Tracking | Dev Team 2 | To Do | 8 Days |
| 3 | Sales Pipeline Management | Visual Pipeline, Drag-and-Drop, Filters | Dev Team 1 | Planned | 12 Days |
| 4 | Task Management | Task Creation, Assignment, Reminders, Tracking | Dev Team 1 | To Do | 7 days |
| 5 | Contact Management | Add Contacts, Import/Export, Bulk Actions | Dev Team 2 | To Do | 9 days |
| 6 | Reporting and Analytics | Create Reports, Visualize Data, Export Reports | Dev Team 3 | In progress | 11 days |
| 7 | Notification System | Real-Time Notifications, Preferences Management | Dev Team 2 | Planned | 6 Days |
| 8 | User Role Management | Role Creation, Permission Assignment, Admin Control | Dev Team3 | Planned | 9 days |
| 9 | Integration with Third-Party Tools | Email and Calendar Sync, API Integration | Dev Team 2 | Planned | 10 days |
| 10 | Customer Support Ticketing | Ticket Creation, Assignment, Status Tracking | Dev Team 1 | To Do | 8 days |

Product Burndown chart:



Sprint Burndown chart:



Document 6: Sprint meetings

Meeting Type 1: Sprint Planning meeting

|  |  |
| --- | --- |
| Date: | 22-03-2025 |
| Time: | 10:00 AM - 12:00 PM |
| Location: | Microsoft Teams |
| Prepared By: | Tanisha Mohane |
| Attendees | Product Owner, Scrum Master, Development Team, QA, UX Designer |

Agenda Topics:

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| Topic | Presenter | Time allotted |
| Project Overview and Objectives | Product Owner | 15 mins |
| User Story Prioritization | Scrum Master | 30 mins |
| Development Tasks Assignment | Development Team Lead | 30 mins |
| Test Cases and QA Plan | QA Lead | 20 mins |
| UI/UX Review | UX Designer | 15 mins |

Other Information:

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| Observer | Resources | Special notes |
| None | Sprint Backlog, Product Vision | Ensure alignment with Product Roadmap |

Meeting Type 2: Sprint Review Meeting

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| Date: | 05-04-2025 |
| Time: | 3:00 PM - 4:30 PM |
| Location: | Microsoft Teams |
| Prepared By: | Scrum Master |
| Attendees | Product Owner, Stakeholders, Development Team, QA |

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| Sprint status | Things to demo | Quick update | What’s Next |
| Sprint Completed | CRM Dashboard, Login Flow | Minor bug fixes pending | Start Sprint 2 with new tasks |
| 90% Tasks Completed | Report Generation Feature | Performance issues resolved | Address UX feedback |

Meeting Type 3: Sprint Retrospective Meeting

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| Date: | 06-04-2025 |
| Time: | 11:00 AM - 12:00 PM |
| Location: | Microsoft Teams |
| Prepared By: | Scrum Master |
| Attendees | Scrum Team |

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| Agenda | What Went Well | What Didn’t Go Well | Questions | Reference |
| Team Collaboration | Smooth Development Process | Delays due to unclear requirements | How to improve estimations? | Sprint 1 Review Report |
| Process Improvement | Fast Bug Resolution | Slow feedback from stakeholders | Better feedback channel? | Feedback Report |

Meeting Type 4: Daily Stand-Up Meeting

Week: 22-03-2025 to 28-03-2025

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| Question | Name/Role | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
| What did you do yesterday? | Developer 1 |

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| What will you do today? | Developer 1 | Work on Login UI | Backend API | Testing | Debugging | Report Generation | N/A | N/A |
|  | Developer 2 | API Creation | Frontend Fixes | QA Testing | Documentation | API Enhancements  | N/A | N/A |
|  | Developer 3 | UI Design | Component Testing | Bug Fixing | Integration Testing | Final Review | N/A | N/A |
| What (if any) is blocking you? | Developer 1 | No | No | Minor Bug | No | No | N/A | N/A |
|  | Developer 2 | No | No | API Delay | No | No | N/A | N/A |
|  | Developer 3 | No | Minor UI Glitch | No | No | No | N/A | N/A |