AGILE CRM DEVELOPMENT FOR GOVERNMENT SCHEME CONSULTANCY

A Sprint-Based Approach to Automate and Streamline Government Scheme Operations

ABSTRACT

This project focuses on building an Agile-based CRM system for a consultancy firm that manages government scheme applications. The goal is to centralize client data, automate follow-ups, track scheme updates in real-time, and improve collaboration across teams. Developed using the Scrum framework, the CRM integrates tools like TATA Dialer, WhatsApp, and Power BI. It enhances operational efficiency, reduces manual work, and ensures timely, error-free submissions—ultimately boosting client satisfaction and business scalability.

shailesh mishra

Agile Business Analysis – CRM Project Using Scrum Framework

Definition of Done (DoD)

A **Definition of Done** for this Agile CRM project includes the following checklist:

- Code developed for all user stories and features
- Assumptions of each user story met and validated
- No build errors; app runs on test and production-like environment
- Unit tests created and successfully passed
- CRM deployed and verified on staging servers
- Cross-browser and device testing done as per client requirements
- Reviewed and approved by UI/UX designer
- QA performed; all critical bugs resolved
- All features passed their respective **Acceptance Criteria**
- Approved by Product Owner
- Refactoring and code optimization completed
- Configuration and environment setup documented
- End-user and technical documentation updated
- Peer code reviews done and comments resolved

Product Vision

Project Name: Agile CRM for Government Scheme Consultancy
Client: Internal consultancy firm
Scrum Master: Vikash Mishra
Product Owner: Naveen singh
Developers: 5 (Frontend, Backend, Integration)
Date/Time: [Insert Start & End Date]
Venue: [Virtual/Office]
Draion: 3 months MVP, 6 months full rollout

Scrum Team:

Role	Name
Scrum Master	Vikash Mishra
Product Owner	Naveen singh
Scrum Developer 1	Front-end Developer
Scrum Developer 2	Backend Developer
Scrum Developer 3	Integration Engineer
Scrum Developer 4	QA Tester
Scrum Developer 5	UI/UX Designer

Vision Statement:

To build a custom, secure, and scalable **CRM platform** that enables government scheme consultants to **digitally manage leads, track applications, and automate follow-ups**, reducing manual efforts by 50% and ensuring no opportunity is missed due to human error or delayed coordination.

This CRM will act as a **central source of truth** for all client interactions, documentation, and scheme deadlines — ensuring real-time visibility, better communication, and improved client satisfaction.

Target Group

Market Segment:

- Government scheme consultancy domain
- B2B and B2C consulting services

Target Users & Customers:

- Internal consultancy staff: Sales, Documentation, Support
- End clients applying for schemes
- Management and decision-makers

Needs & Problem Solved

Problem Statement:

- Data spread across Excel, WhatsApp, emails, and voice calls
- Missed scheme updates and deadlines due to manual tracking
- Delays in follow-ups and lack of visibility on client status
- Repetitive admin tasks like reminders and document verification
- No consolidated reports or performance insights for decision-makers
- Limited audit trails and weak data security

Solution Offered by CRM:

- Centralized lead and document tracking
- Real-time alerts for scheme changes and deadlines
- Integrated communication (calls, emails, WhatsApp)
- Automated task reminders and document validation
- Secure, role-based access
- Power BI dashboards for reporting

Value to Business

Benefits to the Company:

- **Increased Efficiency:** Reduces follow-up time and documentation delays

- **Real-Time Monitoring:** Clear visibility of client progress and team workload
- **Better Decision Making:** Through Power BI/Tableau dashboards and reports
- **Client Satisfaction:** Faster communication and transparent process
- **Regulatory Compliance:** Role-based access and data audit trails
- **Scalability:** Built to handle increasing schemes, users, and leads
- **Integration Ready:** With TATA Dialer, WhatsApp, and Email tools
- **Cost Savings:** Minimizes manual work, reduces error rate
- **Business Goals:**
- Improve client engagement and submission success rate by 40%
- Ensure 90%+ user adoption within 2 months of rollout
- Maintain 99% system uptime and data accuracy
- Establish CRM as a competitive differentiator in the consultancy market
- **Business Model:**
- Internal CRM development and rollout for operational efficiency
- Optional SaaS model for future external consulting partners

User stories

<table>
<tr><td colspan="2">User story No: US001</td><td colspan="2">Tasks: Design Lead Form, Backend API, Frontend UI</td><td colspan="2">Priority: High</td></tr>
<tr><td colspan="6">Value statement:
As a sales executive, I want to add new leads to a centralized system, so that I can track and manage them efficiently.</td></tr>
<tr><td colspan="3">BV: 10</td><td colspan="3">CP: 3</td></tr>
<tr><td colspan="6">Acceptance criteria:
- Lead form must include fields like Name, Mobile, Email, Scheme interested
- Form validation for mandatory fields
- Leads saved in database
- Success confirmation displayed
- Stored lead should appear in dashboard immediately</td></tr>
</table>

<table>
<tr><td colspan="2">User story No: US002</td><td colspan="2">Tasks: API Integration, Log Mapping</td><td colspan="2">Priority: High</td></tr>
<tr><td colspan="6">Value statement: As a sales rep, I want to log call history using TATA Dialer, so that I can view communication with each lead.</td></tr>
<tr><td colspan="3">BV: 9</td><td colspan="3">CP: 5</td></tr>
<tr><td colspan="6">Acceptance criteria:
- Dialer integration successful
- Each call log is stored with timestamp and remarks
- Linked with respective lead ID
- Logs visible in lead profile</td></tr>
</table>

<table>
<tr><td>User story No: US003</td><td>Tasks: Alert module, Notification engine</td><td>Priority: High</td></tr>
<tr><td colspan="3">Value statement: As a documentation team member, I want to receive alerts for scheme updates, so that I can act on them before deadlines.</td></tr>
<tr><td colspan="2">BV: 8</td><td>CP: 5</td></tr>
<tr><td colspan="3">Acceptance criteria:
- Scheme update feed connected
- Alerts triggered based on rules
- Email/SMS notifications configured
- Dashboard alert section displayed</td></tr>
</table>

<table>
<tr><td>User story No: US004</td><td>Tasks: Create document upload module</td><td>Priority: Medium</td></tr>
<tr><td colspan="3">Value statement: As a document verifier, I want to upload and review scheme documents, so that I can verify eligibility faster</td></tr>
<tr><td colspan="2">BV: 7</td><td>CP: 4</td></tr>
<tr><td colspan="3">Acceptance criteria:
- Allowed file types: PDF, JPG, PNG
- Upload feature linked to lead profile
- Review and approval option
- Status changes to “Documents Verified</td></tr>
</table>

<table>
<tr><td>User story No: US005</td><td>Tasks: User roles, Access configuration</td><td>Priority: High</td></tr>
<tr><td colspan="3">Value statement: As an admin, I want to set role-based access,
so that I can ensure data is securely shared only with relevant teams.</td></tr>
<tr><td colspan="2">BV: 9</td><td>CP: 4</td></tr>
<tr><td colspan="3">Acceptance criteria:
- Roles: Sales, Docs, Support, Admin
- Permissions defined per role
- User creation & editing enabled
- Unauthorized access blocked</td></tr>
</table>

User story No: US006	Tasks: Dashboard UI, API Integration	Priority: Medium
Value statement: As a team lead,I want to see dashboards for team performance, so that I can monitor submission status and task loads		
BV: 6	**CP:** 3	
Acceptance criteria: - Dashboard shows lead status by agent - Filters: Date, Scheme, Agent - Visual charts: Pie, Bar - Export to Excel/PDF available		

User story No: US007	Tasks: WhatsApp API, Message templates	Priority: Medium
Value statement: As a support executive, I want to send scheme reminders via WhatsApp, so that I can ensure clients submit their docs on time.		
BV: 7	**CP:** 4	
Acceptance criteria: - WhatsApp template approved - Message triggered on specific dates - Client reply logs saved - Status change reflected in CRM		

User story No: US008	Tasks: Assignments module, Notification system	Priority: Medium
Value statement: As a manager,I want to assign leads to team members, so that I can ensure balanced work allocation		
BV: 7	**CP:** 3	
Acceptance criteria: - Assign button available per lead - Member list shown by department - Email notification on assignment - Lead history updated with assignment log		

<table>
<tr><td colspan="2">User story No: US009</td><td colspan="2">Tasks: Track status module</td><td colspan="2">Priority: Medium</td></tr>
<tr><td colspan="6">Value statement:
As a client, I want to track the status of my application, so that I can stay informed without calling support</td></tr>
<tr><td colspan="3">BV: 6</td><td colspan="3">CP: 3</td></tr>
<tr><td colspan="6">Acceptance criteria:
- Client login portal created
- Shows current status, last updated date
- Messaging/contact option if delayed
- Status auto-updated via internal progress flow</td></tr>
</table>

<table>
<tr><td colspan="2">User story No: US010</td><td colspan="2">Tasks: Setup reports in Power BI</td><td colspan="2">Priority: Low</td></tr>
<tr><td colspan="6">Value statement: As a director,I want to view monthly performance reports, so that I can make strategic decisions based on data.</td></tr>
<tr><td colspan="3">BV: 5</td><td colspan="3">CP: 3</td></tr>
<tr><td colspan="6">Acceptance criteria:
- Power BI report connected to CRM DB
- Metrics: lead count, conversion rate, doc submission rate
- Email report scheduling enabled
- Exportable visuals in PDF/PNG</td></tr>
</table>

Agile PO Experience

The Product Owner (PO) plays a crucial role in the success of an Agile project. The PO carries the vision of the product based on domain/industry knowledge and current market needs. For this Agile CRM development project for government scheme consultancy, the following PO responsibilities and experiences were fulfilled:

Key Responsibilities of Product Owner in the Project

Market Analysis

- Conducted a detailed analysis of the market need for a CRM tailored to government scheme consultancy.
- Researched existing CRM tools and found a lack of domain-specific features like scheme tracking, compliance, and government alerts.

Enterprise Analysis

- Performed due diligence to validate the opportunity of building an internal CRM system.
- Aligned the product initiative with business objectives and consultancy growth plans.

Product Vision & Roadmap

- Defined the product vision to build a centralized, automated, and scalable CRM.
- Created a roadmap with high-level features and milestones across sprints, starting with an MVP and scaling to a full rollout.

Managing Product Features

- Captured and prioritized product features in consultation with stakeholders.
- Used MoSCoW prioritization and ROI analysis to break down features into Epics, User Stories, and Tasks.
- Aligned features with critical business needs and user value.

Managing Product Backlog

- Created and maintained the Product Backlog of all user stories.
- Regularly reprioritized the backlog based on stakeholder inputs and sprint outcomes.
- Collaborated with the Scrum Team during backlog grooming and sprint planning sessions.

Managing Overall Iteration Progress

- Participated in sprint reviews to monitor product progress.
- Supported replanning of stories based on actual sprint performance and new requirements.
- Worked with the Business Analyst to conduct retrospectives and implement continuous improvement.

Agile Ceremonies Handled as Product Owner

During the Agile project, I actively participated in and contributed to all key Scrum ceremonies:

1. **Sprint Planning Meeting**
   - Defined sprint goals and selected backlog items
   - Clarified acceptance criteria and prioritized tasks
2. **Daily Scrum Meeting**
   - Monitored team progress
   - Unblocked any issues and aligned deliverables

3. Sprint Review Meeting

- Reviewed sprint deliverables and conducted demos
- Collected feedback from stakeholders

4. Sprint Retrospective Meeting

- Discussed what went well and areas of improvement
- Agreed on action items for the next sprint

5. Backlog Refinement Meeting

- Revisited backlog to refine scope, BV, and CP
- Broke down Epics into smaller stories

User Story Creation

I contributed to the creation and validation of user stories. Each story included:

- Story No: Unique identifier for traceability
- Tasks: Actionable steps to deliver the story
- Priority: Based on business value and urgency
- Acceptance Criteria: Clear, testable outcomes
- BV (Business Value): Impact score assigned via planning poker
- CP (Complexity Points): Relative development effort

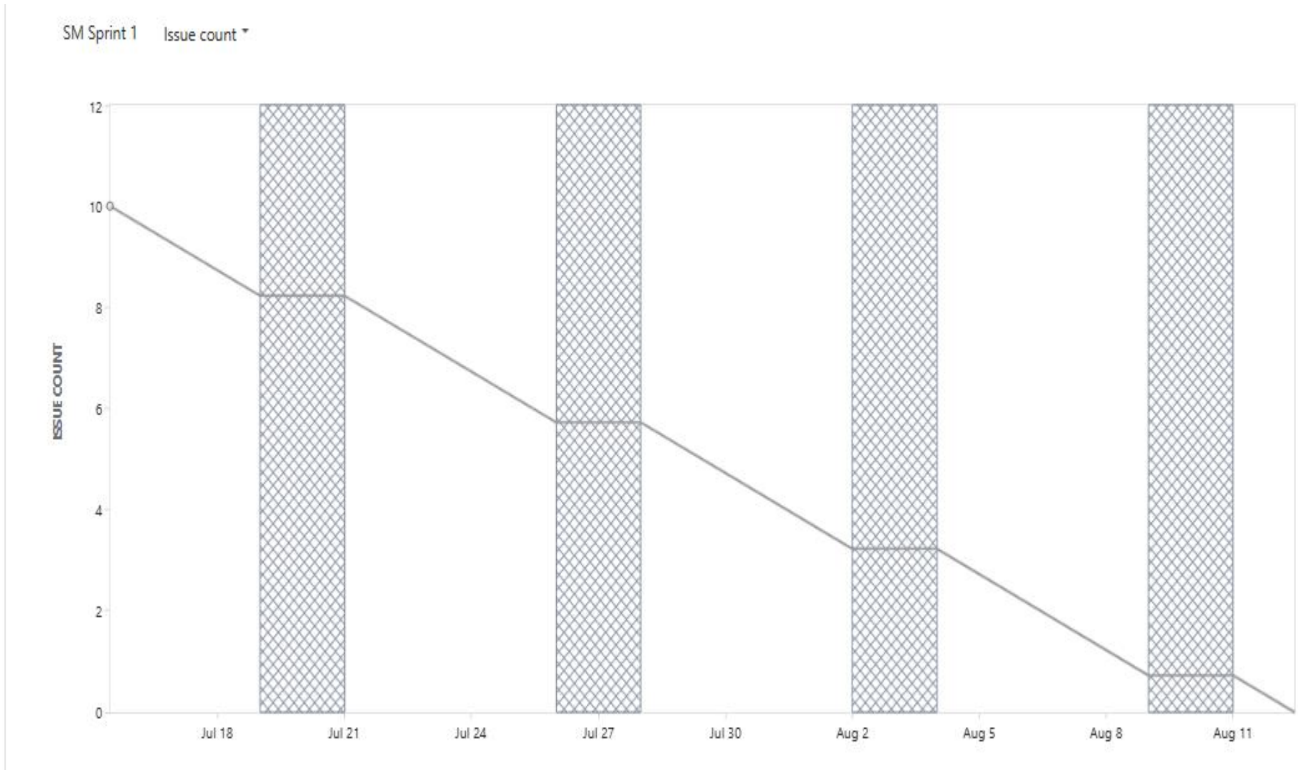
Role of Product Owner in the Scrum Framework

- Acted as a bridge between stakeholders and Scrum Team
- Ensured all areas of the business were informed about project status
- Maintained transparency, alignment, and business goal focus throughout the lifecycle
- Developed a clear vision of product features and translated them into user stories and backlog items

Summary

As the Product Owner, I ensured that the CRM product vision was realized through structured backlog management, agile ceremonies, and active collaboration with all stakeholders. This role not only enhanced delivery focus but also allowed the team to build a high-impact, domain-specific CRM platform.

Product and sprint backlog and product and sprint burndown charts



Sprint meetings

Meeting Type 1: Sprint Planning meeting

Field	Details
Date	01-Aug-2024
Time	10:00 AM – 11:30 AM
Location	Online – MS Teams
Prepared By	Product Owner – Shailesh Mishra
Attendees	Product Owner, Scrum Master, Developers, QA

Agenda Topics

Topic	Presenter	Time Allotted
Review Product Backlog	Product Owner	20 minutes
Story Estimation (BV & CP)	Developers	30 minutes
Sprint Goal Finalization	Scrum Master	20 minutes
Task Assignment & DoD Discussion	QA + Team Lead	20 minutes

Other Information

Observers	**Project Manager – Internal PMO**
Resources	Jira Board, Product Backlog, Velocity Chart
Special Notes	Focus on MVP features in Sprint 1

Sprint Review Meeting

Field	Details
Date	15-Aug-2024
Time	03:00 PM – 04:00 PM
Location	Online – MS Teams
Prepared By	Scrum Master
Attendees	Scrum Team, Product Owner, Stakeholders

Sprint Summary

Sprint Status	Things to Demo	Quick Updates	What's Next
Completed 5 user stories	Lead management module Call log with TATA Dialer	Minor bug in call log view fixed UI improvement done	Start work on Scheme Alerts Module in Sprint 2

Sprint Meetings – Part 2

Sprint Retrospective Meeting

Field	Details
Date	16-Aug-2024
Time	11:00 AM – 12:00 PM
Location	Online (MS Teams)
Prepared By	Scrum Master
Attendees	Product Owner, Scrum Master, Developers, QA

Agenda Discussion

Agenda	**What went well**	**What didn't go well**	**Questions**	**Reference**
Sprint 1 Review	User stories were completed on time Good team coordination	Integration with TATA Dialer was delayed due to unclear APIs	Can we add buffer time for integrations in Sprint 2?	Jira Sprint Report
Collaboration Flow	Daily standups helped resolve blockers quickly	Backend and UI mismatch on Lead screen	Can BA share detailed mockups early in sprint?	Axure Wireframes

Daily Stand-up meeting

What did you do yesterday?	Developer 1	Designed lead form DB	Created API for leadentry	Integrated API with UI	Validated lead form	Finalized front-end flow
	Developer 2	Studied Dialer API	Created API connection	Implemented call log logic	Tested call logging	QA review for dialer
	Developer 3	Created dashboard wireframe	Built dashboard UI	Connected dashboard to DB	Filter implementation	Applied client feedback
What will you do today?	Developer 1	Work on validation rules	Fix UI bugs	Conduct unit testing	Peer code review	Prepare for sprint review
	Developer 2	Debug call log issues	Handle edge cases	Test in staging	Documentation updates	Final API push
	Developer 3	Polish UI components	Apply design feedback	Add export option	Prepare demo flow	Final layout adjustments
What (if any) is blocking your progress?	Developer 1	None	APIvalidation delay	None	None	None
	Developer 2	Delay in dialer endpoint	Missing data logs	None	None	None
	Developer 3	UI Feedback	Layout conflict	None	None	None

Question

Name/Role Week “X” (from dd-mm-yyyy to dd-mm-yyyy)

Monday Tuesday Wednesday Thursday Friday