1. Document 1: Definition of Done:-

Answer:

* DoD for “Log in” functionality:

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| Sr. No. | Checklist | User Story DoD | Sprint DoD | Release DoD |
| 1 | Produced code for presumed functionalities | Code for login page functionality is developed & implemented. | All login related tasks including UI & authentication services are completed. | Login feature fully integrated with the release. |
| 2 | Assumptions of User Story met | All assumptions of user story like user role, authentication & security protocols are met. | All assumption of sprint like user roles, authentication, system performance are met. | Met all business assumptions of login functionality like user role, authentication & security protocols. |
| 3 | Project builds without errors | User story build without any error. | Sprint builds successfully. No error found. | Login feature, is built and integrated into the release without errors. |
| 4 | Unit tests written and passing | Unit tests are written for validating the login process & passed. | Unit tests are written for validating the login process & passed. | Extensive unit tests are written and pass. |
| 5 | Project deployed on the test environment identical to production platform | Deployed in test environment to match the production. | Sprint's login functionality is deployed on a test environment. | This release deployed in production environment for final verification. |
| 6 | Tests on devices/browsers listed in the project assumptions passed | Functionality is tested on all specified devises & browser and passed. | Functionality is tested on all specified devises & browser and passed. | Feature passes all tests and works on all platforms. |
| 7 | Feature ok-ed by UX designer | Login page UI is reviewed & approved by UX designer. | The login page UI design is approved by the UX designer. | Final login functionality design has been reviewed and signed by the UX designer. |
| 8 | QA performed & issues resolved | QA has tested the login functionality, 9identified issues, and resolved it before marking user story as done. | QA has tested the login functionality, identified issues, and resolved it the sprint concludes. | QA testing has been conducted & confirms no issues. |
| 9 | Feature is tested against acceptance criteria | The login functionality is verified against predefined acceptance criteria. | Login functionality is validated against the sprint’s acceptance criteria and has passed all tests. | Login feature meets all acceptance criteria defined for the release. |
| 10 | Feature ok-ed by Product Owner | PO reviews functionality & approves it. | The Product Owner signs off on the login functionality as part of the sprint review, confirming that it satisfies the sprint goal. | Product Owner signs off on the feature. |
| 11 | Refactoring completed | Refactoring is done to improve performance of login functionality. | Code is refactored to ensure maintainability, performance, and scalability | Final refactoring has been performed to Optimize performance. |
| 12 | Any configuration or build changes documented | All configurations are documented for future reference. | All configuration changes are documented. | Configuration and build changes documented. |
| 13 | Documentation updated | All documents like user guide are updated. | Sprint documentation is updated to include details about the login functionality. | Final documentation updated like release note. |
| 14 | Peer Code Review performed | Peer code review is done. | Peer review performed. | Code reviewed, refactored, and optimized. |

* DoD for “Create New Lead” functionality:

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| Sr. No, | Checklist | User Story DoD | Sprint DoD | Release DoD |
| 1 | Produced code for presumed functionalities | Code is developed for lead creation is implemented. | Lead creation integrated into the sprint. | Functionality is fully integrated into the release stage and it is ready to deploy in production. |
| 2 | Assumptions of User Story met | Assumptions such as expected lead data fields, lead sources, validation rules are met. | All assumption of sprint for create new lead functionality are met. | All assumptions related to lead creation are met and confirmed. |
| 3 | Project builds without errors | User story build without any error. | Sprint builds successfully. No error found. | The complete release is built and tested successfully without errors. |
| 4 | Unit tests written and passing | Unit tests are created for validation and passed. | Unit tests are passed successfully. | All unit tests functionality are executed and pass. |
| 5 | Project deployed on the test environment identical to production platform | Deployed in test environment to match the production. | Deployed in a test environment that match with the the production setup to ensure proper behaviour. | The release is deployed on a test environment for final validation before release. |
| 6 | Tests on devices/browsers listed in the project assumptions passed | Functionality is tested on all specified devises & browser and passed. | Functionality is tested on the devices and browsers & passed. | Functionality is tested across all required devices and browsers, confirming it works as expected. |
| 7 | Feature ok-ed by UX designer | UI is reviewed and approved by UX to ensure it meets design standards. | The UX designer reviews and approves the UI. | The final design of the is reviewed and approved by the UX designer to ensure it meets usability standards. |
| 8 | QA performed & issues resolved | QA tests completed, and issues resolved to ensure functionality. | QA thoroughly tests the feature, and resolved the issue before the sprint concludes. | QA tests the entire feature within the release context, and any bugs or issues are resolved before release. |
| 9 | Feature is tested against acceptance criteria | Create new functionality is verified against predefined acceptance criteria. | Create new lead feature is tested against the acceptance criteria defined for the sprint. | Create new functionality is thoroughly tested against the acceptance criteria defined in release requirements. |
| 10 | Feature ok-ed by Product Owner | Product Owner reviews and approves the functionality. | Product Owner approves the functionality and confirms it aligns with the user story goals. | Product Owner approves the functionality and confirms it aligns with the sprint goal. |
| 11 | Refactoring completed | Code refactoring is done to improve maintainability and performance. | Code refactoring is completed to improve clarity and performance after sprint implementation. | Code is refactored to ensure maintainability, performance, and scalability |
| 12 | Any configuration or build changes documented | All configurations are documented for future reference. | All configuration are documented. | All changes to configurations, environments, or build processes are documented for future reference. |
| 13 | Documentation updated | User guides and technical documentation are updated to reflect the new lead creation functionality. | Sprint documentations are updated to include information on functionality. | All release documentation like user manuals and technical specs, and release notes are is updated to reflect the functionality. |
| 14 | Peer Code Review performed | Peer code review performed. | Peer code review performed. | Peer code review completed. |

2. Document 2- Product Vision:-

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| Scrum Project Name | Salesforce Lead Management Software Implementation | | |
| Venue | Pune | | |
| Date | 01/06/2024 | 28/02/2025 | 9 months |
| Client | Raamaya Technologies | | |
| Stakeholder list | Raamaya Technologies Executive Team | | |
| Sales representative & sales Manager | | |
| Marketing Team | | |
| Bidding & Tender team | | |
| Customer Service/Support Team | | |
| Operations and Project Management Team | | |
| Procurement team | | |
| IT Infrastructure Team | | |
| Scrum Team | | | |
| Scrum Master | Ms. Pratiksha Patel | | |
| Product Owner | Ms. Komal Chauhan | | |
| Scrum Developer 1 | Mr. Ajit Chauhan | | |
| Scrum Developer 2 | Mr. Vijay Parikh | | |
| Scrum Developer 3 | Ms. Kalpana Mehta | | |
| Scrum Developer 4 | Ms. Nehal Shah | | |
| Scrum Developer 5 | Mr. Nikunj Mehta | | |

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| Vision: The vision for implementing the Salesforce Lead Management Software at Raamaya Technologies is to transform and streamline the lead management process for better efficiency, collaboration, and tracking, particularly in the context of handling government contracts. | | | |
| Target group | Needs | Product | Value |
| Q. Which market segment does the product address?  A.  IT Resellers and System Integrators focusing on B2G (Business to Government) Market  Companies that provide services/products for government organizations through bidding & tender | Q. What problem does the product solve?  A.  Inefficiency, Lack of automation, Fragmented communication, Inadequate visibility, Compliance challenges, Inconsistent follow-up | Q. What product is it?  A.  Salesforce Lead Management Software is a CRM solution designed to streamline, automate, and enhance the lead generation and qualification processes. | Q. How is the product going to benefit the company?  A.  The implementation of Salesforce Lead Management Software will significantly improve Raamaya Technologies' ability to manage leads, bids, and government contracts. The system will help automate manual processes, streamline operations, and provide deeper insights into business performance.  Q.  What are the business goals?  A.  Improving operational efficiency, increasing revenue, ensuring compliance, and enhancing customer satisfaction. |
| Q. Who are the target users and customers?  A.  Users:  Sales Representatives, Business Development Managers,  Marketing Teams, Sales Managers, and Leadership Teams.  Customers:  Government organizations | Q. Which benefit does it provide?  A.  Increased Efficiency and Time Savings  Improved Lead Qualification and Conversion  Better Collaboration and Communication  Enhanced Reporting and Analytics  Improved Lead Tracking and Transparency  Scalability and Flexibility  Enhanced Compliance and Regulatory  Management  Better Customer Engagement and Satisfaction  Reduction in Missed Opportunities  Cost Savings | What makes it desirable and special?  A.  It is a unique combination of powerful features, adaptability, and integration capabilities that address the specific challenges businesses face in managing leads, particularly in complex sectors like government contracts.  Q.  Is it feasible to develop the product?  A.  Yes, it is **feasible** to implement Salesforce Lead Management Software for Raamaya Technologies, considering their specific needs as an IT reseller and system integrator working with government organizations. Salesforce provides a flexible, scalable, and secure platform that can be customized to support lead management, bid tracking, and compliance with government processes. | Q.  What is the business model?  A.  Raamaya Technologies operates under **Business-to-Government** model, providing IT solutions, system integration, consulting, and support services tailored to the needs of government organizations. Their business model relies on bidding for government contracts, selling technology products, and offering specialized services that help government agencies streamline their operations and comply with industry regulations. |

3. Document 3: User stories:-

Answer:

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| User Story ID. 1 | Tasks: 7 | Priority: Highest |
| As a user, I want to securely log in to Salesforce with my username and password,  so that I can access my lead data, tasks, and other features within the system. | | |
| BV: 500 | CP: 05 | |
| Acceptance criteria:   * Users must enter a valid username and password to log in. * If the username or password is incorrect, an error message should appear. * The system should support secure login, with encryption of passwords. * There should be an option to reset the password if forgotten, through a secure email link. * Login attempts should be limited after multiple failed attempts, with a lockout mechanism or CAPTCHA to prevent brute force attacks. * The system should remember the user's login credentials if the "Remember Me" option is selected (optional feature). * Users should be redirected to the home page/dashboard after a successful login. | | |

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| User Story ID. 2 | Tasks: 4 | Priority: Highest |
| As a sales representative, I want to capture leads automatically from government tenders, email inquiries, and external portals, so that I can track all potential opportunities and avoid manual entry errors. | | |
| BV: 400 | CP: 04 | |
| Acceptance criteria:   * Leads can be captured automatically from government tender systems or portals (e.g., via API or integration). * Leads can be manually entered via a form if not automatically captured. * Lead entry should include essential government-specific information, such as tender reference, contract value, and government agency name. * Capture details should be structured, adhering to government-specific data requirements. | | |

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| User Story ID. 3 | Tasks: 4 | Priority: Medium |
| As a sales representative, I want to categorize and qualify leads based on government-specific criteria like specific turnover, previous experience etc. so that I can focus on leads that align with our business and capabilities. | | |
| BV: 500 | CP: 04 | |
| Acceptance criteria:   * Leads can be categorized by government agency, project type, bid deadlines, and eligibility requirements. * Lead qualification fields include required compliance certifications, eligibility for a specific government contract, and budget constraints. * The system flags unqualified leads based on specific criteria (e.g., a lead not meeting compliance requirements). * Sales reps can track whether a lead has been pre-qualified for a specific government tender. | | |

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| User Story ID. 4 | Tasks: 4 | Priority: Highest |
| As a sales manager, I want to assign leads to the most appropriate team member based on their expertise like experience with certain government contracts, regional knowledge, so that we can respond to tenders more efficiently and with higher expertise. | | |
| BV: 400 | CP: 04 | |
| Acceptance criteria:   * Leads are routed automatically based on predefined rules such as geography, tender type, or experience. * Sales reps are notified of new assignments. * The system allows for manual reassignment if necessary. * An audit trail is maintained for lead assignments for accountability purposes. | | |

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| User Story ID. 5 | Tasks: 4 | Priority: Medium |
| As a sales representative, I want to set automated follow-up reminders based on key tender deadlines, submission dates, and government-specific milestones, so that I never miss an important opportunity to engage with government stakeholders. | | |
| BV: 400 | CP: 05 | |
| Acceptance criteria:   * The system sends automatic reminders for follow-up tasks tied to tender deadlines, meetings, and documentation requirements. * A calendar view is available to see upcoming tender submission deadlines and meetings with government officials. * Sales reps can manually log follow-ups, including communication with government stakeholders. * Follow-up actions are tracked with deadlines and status updates. | | |

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| User Story ID. 6 | Tasks: 6 | Priority: Highest |
| As a sales representative, I want to store and manage all required documents like compliance certificates, tender responses within the system, so that I can ensure that all necessary documentation is available for government tenders and audits. | | |
| BV: 500 | CP: 06 | |
| Acceptance criteria:   * The system allows uploading, storing, and retrieving tender-related documents, including contracts, proposals, and certifications. * The system tracks document version history to ensure that the latest, most compliant versions are being submitted. * Documents are tagged with lead-specific information (e.g., tender number, government agency). * Alerts are triggered if required compliance documents are missing or out of date. * An audit trail is maintained for document uploads and updates | | |

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| User Story ID. 7 | Tasks: 5 | Priority: Medium |
| As a sales representative, I want to track all communication with government representatives related to a lead, so that I can maintain a complete history of interactions and ensure effective follow-up. | | |
| BV: 300 | CP: 04 | |
| Acceptance criteria:   * All communication (emails, calls, meetings) with government officials is logged in the lead record. * Communication history is accessible to all team members working on the lead. * The system allows for adding notes about meetings, discussions, and next steps. * Reminders are sent for follow-up after communication with government representatives. | | |

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| User Story ID. 8 | Tasks: 4 | Priority: Highest |
| As a sales manager, I want to generate reports that provide insights into lead progress, tender success rates, and other government-specific sales metrics, so that I can evaluate team performance and optimize our approach to government contracts. | | |
| BV: 400 | CP: 04 | |
| Acceptance criteria:   * The system provides customizable reports showing lead conversion rates, tender success rates, and sales pipeline health. * Dashboards display key metrics such as the number of leads in each government agency, their status, and expected contract value. * Reports can be filtered by tender type, agency, and lead source (e.g., government tender portals, direct government inquiries). * Insights are available on the most successful tender types and government departments. | | |

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| User Story ID. 9 | Tasks: 4 | Priority: Highest |
| As a sales representative, I want to convert qualified leads into opportunities, so that we can start tracking the tender submission process and work toward closing the deal with the government. | | |
| BV: 400 | CP: 06 | |
| Acceptance criteria:   * Once a lead meets qualifying criteria (e.g., eligibility for a tender, compliance with requirements), it can be converted into an opportunity. * The opportunity includes all relevant information from the lead (e.g., tender reference, government agency, submission deadlines). * A visual representation of the opportunity stage (e.g., qualification, proposal submission, award) is displayed. * The system allows collaboration across teams to manage the opportunity (e.g., legal, compliance, finance). | | |

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| User Story ID. 10 | Tasks: 3 | Priority: Highest |
| As a sales representative, I want to receive notifications when a lead’s status changes, a follow-up is due, or there’s a new lead assigned to me, so that I can take prompt action on my leads and stay on top of my tasks. | | |
| BV: 500 | CP: 03 | |
| Acceptance criteria:   * Notifications are sent via email or within the Salesforce platform when key actions occur (e.g., status change, task reminder). * Sales reps can customize notification settings. * Alerts are triggered based on lead activity (e.g., if a lead is not contacted within a certain period). | | |

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| User Story ID. 11 | Tasks: 3 | Priority: Medium |
| As a sales manager, I want to segment leads based on criteria such as location & department, so that we can target the most relevant leads with personalized outreach. | | |
| BV: 400 | CP: 06 | |
| Acceptance criteria:   * Leads can be segmented by multiple criteria like location, department. * Segments can be used to filter leads and create targeted campaigns or follow-up tasks. * Custom views and reports can be created based on lead segments. | | |

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| User Story ID. 12 | Tasks: 3 | Priority: Medium |
| As an admin, I want to import leads from external sources (e.g., spreadsheets, marketing platforms) and export lead data for reporting purposes, so that I can easily migrate data into Salesforce and perform detailed analysis. | | |
| BV: 300 | CP: 03 | |
| Acceptance criteria:   * Leads can be imported via CSV or API from external systems. * Import functionality includes mapping fields from external systems to Salesforce fields. * Data can be exported for reporting, analysis, or integration with other systems | | |

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| User Story ID. 13 | Tasks: 3 | Priority: Highest |
| As a sales representative, I want to store and update all relevant information about my leads like contact details, interactions, notes in Salesforce, so that I have a accurate view of each lead and can engage effectively. | | |
| BV: 500 | CP: 04 | |
| Acceptance criteria:   * Sales reps can add and edit contact information, interaction notes, and lead preferences. * All interactions (e.g., calls, meetings, emails) are logged automatically. * Custom fields are available to capture additional lead-specific data (e.g., industry, budget). | | |

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| User Story ID. 14 | Tasks: 3 | Priority: Medium |
| As a sales manager, I want to assign scores to leads based on predefined criteria like level of interest, engagement, lead source, so that I can prioritize high-value leads and allocate resources accordingly. | | |
| BV: 200 | CP: 02 | |
| Acceptance criteria:   * Lead scoring is based on attributes like interaction history, job title, and company size. * Leads with higher scores are prioritized for follow-up. * Lead score is visible in the lead record and is updated dynamically as interactions occur. | | |

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| User Story ID. 15 | Tasks: 4 | Priority: Highest |
| As a sales representative, I want to automatically generate government-compliant proposals and documents from lead data, so that I can save time on paperwork and ensure consistency in submissions. | | |
| BV: 400 | CP: 5 | |
| Acceptance criteria:   * Proposal templates are automatically populated with lead-specific information (e.g., agency name, tender requirements, pricing, etc.). * The system checks documents against government regulations and compliance requirements (e.g., formatting, required certifications). * Sales reps can easily generate and customize proposals directly from the lead record. * The document generation tool integrates with e-signature platforms for fast proposal submission. | | |

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| User Story ID. 16 | Tasks: 4 | Priority: Highest |
| As a sales manager, I want to track and manage the entire contract lifecycle from initial lead to final contract execution and renewal, so that I can ensure no step is overlooked and follow all necessary steps to ensure success. | | |
| BV: 400 | CP: 05 | |
| Acceptance criteria:   * The system tracks key milestones in the contract lifecycle (e.g., proposal submission, negotiation, award date, and renewal dates). * Notifications and reminders are sent for important milestones (e.g., contract expiry, renewal deadlines). * Integration with a contract management system to store and review contracts. * Detailed reporting and analytics on the status of each government contract. | | |

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| User Story ID. 17 | Tasks: 4 | Priority: Medium |
| As a sales representative, I want to initiate a multi-stage tender approval workflow that includes legal, finance, and management review, so that we ensure all tender responses are thoroughly vetted before submission. | | |
| BV: 400 | CP: 06 | |
| Acceptance criteria:   * The workflow is multi-step, involving approval from various departments (e.g., legal review, pricing approval from finance). * Notifications are sent to the appropriate team members for their review/approval. * The status of the workflow is visible to all involved parties. * The system tracks each stage of the approval process, including the time taken for each department’s review. | | |

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| User Story ID. 18 | Tasks: 3 | Priority: Medium |
| As a procurement manager, I want to track OEM orders from placement to delivery within Salesforce, so that I can ensure timely fulfillment of government contracts and avoid delays. | | |
| BV: 300 | CP: 06 | |
| Acceptance criteria:   * OEM order details (order date, products ordered, quantities, delivery dates) are captured in Salesforce. * Order status is updated in real-time, including order confirmation, shipment tracking, and delivery dates. * Procurement teams are notified of any delays or issues with OEM orders. * A visual dashboard is available to track the status of all current orders, including OEM lead times. | | |

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| User Story ID. 19 | Tasks: 4 | Priority: Highest |
| As a sales representative, I want to collaborate with OEM partners directly within Salesforce,  so that I can negotiate terms, clarify product details, and manage government tender submissions efficiently. | | |
| BV: 500 | CP: 06 | |
| Acceptance criteria:   * OEM partners can be given controlled access to Salesforce to collaborate on leads and product offerings. * Sales reps can communicate directly with OEM partners within Salesforce, either through comments or integrated messaging features. * OEM partners can provide updates on product availability, pricing, and any potential issues that could affect government contracts. * All collaboration activities are logged and visible to all stakeholders involved in the tender or lead. | | |

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| User Story ID. 20 | Tasks: 6 | Priority: Highest |
| As a procurement manager, I want to track OEM performance within Salesforce, so that I can ensure that our OEM partners are meeting the required standards for government contracts. | | |
| BV: 500 | CP: 08 | |
| Acceptance criteria:   * OEM performance data is tracked in Salesforce, including on-time delivery rates, product quality scores, and adherence to contract terms. * Performance reports are available to evaluate whether OEMs are meeting expectations and fulfilling contractual obligations. * Sales and procurement teams can flag underperforming OEMs and escalate issues for resolution. * Key performance indicators (KPIs) are displayed on a dashboard, showing how each OEM is performing. | | |

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| User Story ID. 21 | Tasks: 3 | Priority: Medium |
| As an Account Manager, I want to create and maintain detailed profiles of OEM partners in Salesforce, So that I can track the partnership details, contracts, and product offerings associated with each OEM. | | |
| BV: 400 | CP: 04 | |
| Acceptance criteria:   * I can create an OEM profile with basic information (name, contact details, location). * I can add OEM-specific products and solutions that they provide. * I can link OEM partners to specific government contracts and tenders. | | |

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| User Story ID. 22 | Tasks: 3 | Priority: Medium |
| As a Partnership Manager, I want to track the status of partnerships with different OEMs,  So that I can manage ongoing relationships and optimize collaboration. | | |
| BV: 400 | CP: 06 | |
| Acceptance criteria:   * I can view a list of active and inactive OEM partners. * I can track the performance of each OEM in terms of product delivery and support. * I can update the status of an OEM partnership (e.g., active, under negotiation, inactive). | | |

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| User Story ID. 23 | Tasks: 4 | Priority: Medium |
| As a Proposal Manager, I want to collaborate with OEM partners on responding to government tenders directly within Salesforce, So that I can streamline the proposal process and ensure that all partners are aligned on the proposal. | | |
| BV: 400 | CP: 06 | |
| Acceptance criteria:   * I can create and share tender opportunities with OEM partners within Salesforce. * I can assign tasks to different OEMs based on their responsibilities like technical specifications, pricing. * I can track progress on the tender response and capture input from all involved OEMs. | | |

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| User Story ID. 24 | Tasks: 2 | Priority: Highest |
| As a Sales Representative, I want to create a new lead record in Salesforce, So that I can start tracking the potential customer or opportunity. | | |
| BV: 500 | CP: 02 | |
| * I can enter basic information about the lead, such as name, contact details, company, and lead source. * I can save the lead record in the system for further follow-up. | | |

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| User Story ID. 25 | Tasks: 2 | Priority: Medium |
| As a Sales Representative, I want to view the details of a lead in Salesforce, So that I can review all the information and follow up accordingly. | | |
| BV: 300 | CP: 04 | |
| * I can open a lead record to view details such as contact information, lead source, status, and any associated notes or tasks. * I can see a history of interactions with the lead. | | |

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| User Story ID. 26 | Tasks: 3 | Priority: Medium |
| As a Sales Representative, I want to edit the details of a lead in Salesforce, So that I can keep the information up-to-date as new information comes in. | | |
| BV: 400 | CP: 04 | |
| * I can modify the lead’s contact details, company information, lead status, and other relevant fields. * I can save the changes and update the lead record. | | |

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| User Story ID. 27 | Tasks: 4 | Priority: Medium |
| As a Sales Representative, I want to search for leads by specific criteria, So that I can find leads based on attributes like name, company, status, or lead source. | | |
| BV: 300 | CP: 06 | |
| * I can use filters or search fields to find leads by criteria (e.g., by name, status, or assigned sales representative). * The search results display relevant information about the leads. | | |

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| User Story ID. 28 | Tasks: 5 | Priority: Medium |
| As a user, I want to securely log out of Salesforce when I am finished, so that my session is ended, and my data remains secure. | | |
| BV: 500 | CP: 06 | |
| Acceptance criteria:   * Users should be able to log out from any page within Salesforce. * A "Logout" button or link is available in the navigation menu or profile dropdown. * Upon clicking "Logout," users should be redirected to the login page or the Salesforce home page (depending on the configuration). * Once logged out, the user should not be able to access Salesforce without logging in again. * The system should automatically log out users after a predefined period of inactivity for security purposes (session timeout). * The logout action should clear session cookies and other user-specific data to ensure privacy and security. | | |

4. Document 4: Agile PO Experience:-

Answer:

A. Market Analysis:

Identified needs of LMS Software in Raamaya Technologies.

Understood business process & objective.

Analysed Current market trend for Lead Management System.

Checked availability of similar LMS software in market & SWOT Analysis.

B. Enterprise Analysis:

Defined the Strategic Business Goal.

Identified Needs and Pain Points of team member.

Checked financial and resource feasibility.

Identified risk & plan for mitigation

Stakeholder alignment.

Final decision of selecting Salesforce Lead Management Software.

C. Product Vision and Roadmap

Understood end users exact needs.

Defined product vision.

Identified high-level features.

Prioritized Based on Value & Feasibility

Defined the Timeline and Milestones for each feature.

D. Managing Product Features

Clear Communication with stakeholder.

Regular stakeholder involvement.

Defined EPICS.

Defined feature list (Stakeholder requirement)

Defined user stories (Functional & Non-functional requirement)

Prioritised using MOSCOW method considering ROI.

Logged Epics & user stories in JIRA Tool.

E. Managing Product Backlog

Broke down large user stories.

Created product backlog in JIRA tool.

Prioritised based on business value & complexity point.

Reprioritization not needed here.

EPIC planning, prioritised epic as per Minimum Viable Product Requirement.

Monitored & adjust epic progress.

F. Managing Overall Iteration Progress

Developer started working on sprint.

Checked progress of each sprint.

Demonstrated product, take feedback of each sprint.

Reprioritization of sprint.

Sprint Meetings:-

1. Sprint Planning Meeting: This meeting scheduled before start of every sprint. Scrum master, product owner and scrum developers participate in this meeting to discuss top things, which are needs in user stories, and decides what can be delivered in the sprint. All Scrum developers select user stories from the product backlog.
2. Daily Scrum Meeting: This meeting leads by Scrum Master every day, They discuss about what they have done? What currently working on? Any problem facing? What they will do today? Scrum Master spent 15 – 20 minutes with every team member.
3. Sprint Review Meeting: Here a review is done after the sprint by the entire team to explain the product functionality and the product performance is measured.
4. Sprint Retrospective Meeting: After the sprint review meeting, a retrospective is done to understand what went wrong, improvement needed and how to correct it in future sprints.
5. Backlog refinement meeting: Backlog refinement, also known as backlog grooming, is an ongoing process where the product owner and development team collaborate to ensure the product backlog is clear, detailed, and prioritized, making it ready for upcoming sprints.

* User Story: A User Story is a brief, simple, and clear description of a feature or functionality that a software product must have, written from the perspective of the end user or customer.
* Story Number: A unique identifier assigned to each user story in the product backlog. It is used for easy reference and tracking of the user story throughout its lifecycle, ensuring clarity in discussions and documentation.
* Tasks: The smaller, more detailed activities or actions required to complete the work described in the user story. Tasks break down the user story into manageable steps for the development team to execute during the sprint.
* Priority: The level of importance or urgency assigned to a user story relative to other user stories in the backlog. Priority helps the team and product owner decide which stories to focus on first, ensuring the most valuable or urgent features are delivered first.
* Acceptance Criteria: A set of conditions that must be satisfied for a user story to be considered complete. These criteria define what "done" looks like and help ensure the functionality meets the user’s needs and business requirements.
* Business Value: The value that a user story brings to the business or customer. It is used to assess the importance of the story in terms of business impact, and helps prioritize user stories in the product backlog based on how much they contribute to achieving business goals.
* Complexity Points: A relative measure of the effort or complexity involved in completing a user story. It is used by the team to estimate how much work the story will require, based on factors like size, complexity, and unknowns. Story points help with capacity planning and sprint forecasting.

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

Answer:

* Product Backlog:

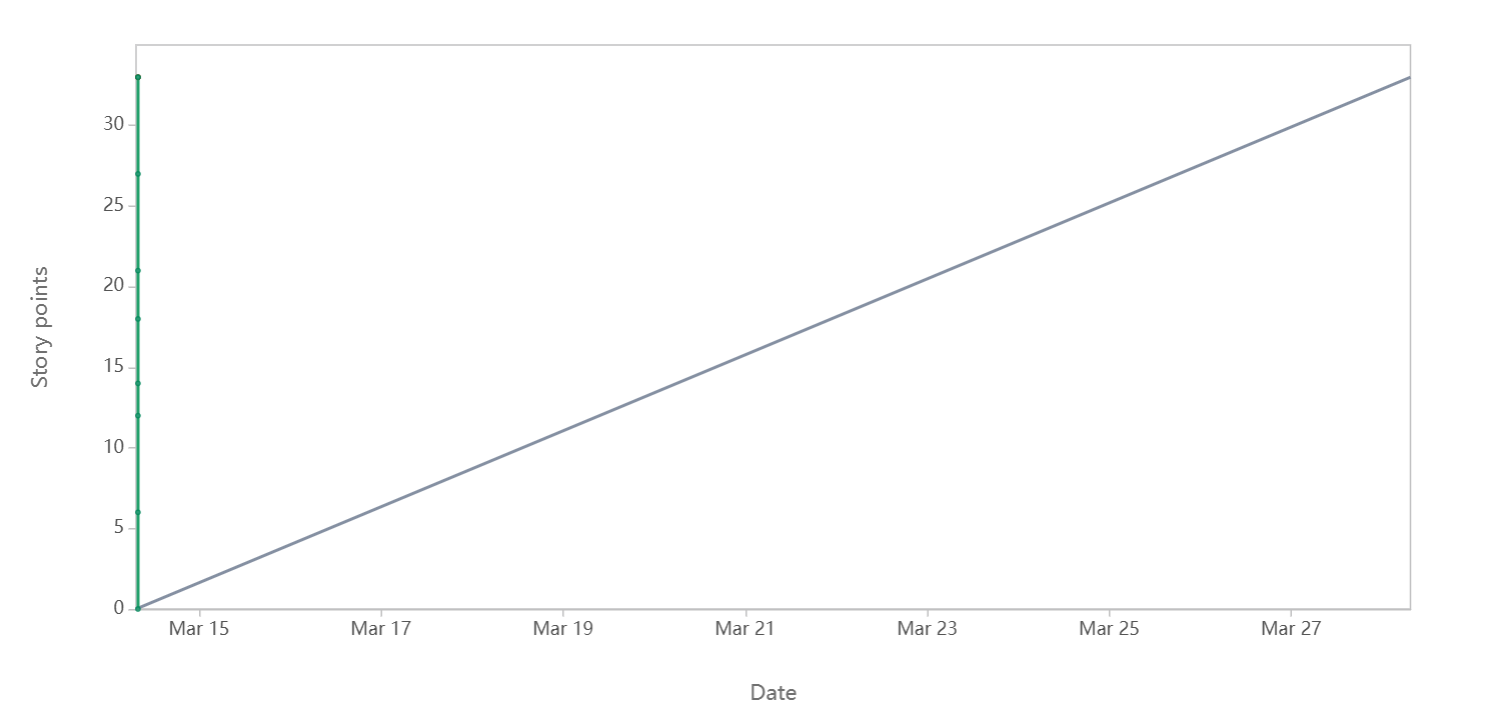
|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| User story ID | User story | Tasks | Priority | BV | CP | Sprint |
| 1 | As a user, I want to securely log in to Salesforce with my username and password, so that I can access my lead data, tasks, and other features within the system. | 7 | Highest | 500 | 5 | 1 |
| 2 | As a sales representative, I want to capture leads automatically from government tenders, email inquiries, and external portals, so that I can track all potential opportunities and avoid manual entry errors. | 4 | Highest | 400 | 4 | 1 |
| 3 | As a sales representative, I want to categorize and qualify leads based on government-specific criteria like specific turnover, previous experience etc. so that I can focus on leads that align with our business and capabilities. | 4 | Medium | 500 | 4 | 1 |
| 4 | As a sales manager, I want to assign leads to the most appropriate team member based on their expertise like experience with certain government contracts, regional knowledge, so that we can respond to tenders more efficiently and with higher expertise. | 4 | Highest | 400 | 4 | 1 |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 5 | As a sales representative, I want to set automated follow-up reminders based on key tender deadlines, submission dates, and government-specific milestones, so that I never miss an important opportunity to engage with government stakeholders. | 5 | Medium | 400 | 5 | 1 |
| 6 | As a sales representative, I want to store and manage all required documents like compliance certificates, tender responses within the system, so that I can ensure that all necessary documentation is available for government tenders and audits. | 6 | Highest | 500 | 6 | 1 |
| 7 | As a sales representative, I want to track all communication with government representatives related to a lead, so that I can maintain a complete history of interactions and ensure effective follow-up. | 5 | Medium | 300 | 3 | 1 |
| 8 | As a sales manager, I want to generate reports that provide insights into lead progress, tender success rates, and other government-specific sales metrics, so that I can evaluate team performance and optimize our approach to government contracts. | 4 | Highest | 400 | 4 | 2 |
| 9 | As a sales representative, I want to convert qualified leads into opportunities, so that we can start tracking the tender submission process and work toward closing the deal with the government. | 4 | Highest | 400 | 6 | 2 |
| 10 | As a sales representative, I want to receive notifications when a lead’s status changes, a follow-up is due, or there’s a new lead assigned to me, so that I can take prompt action on my leads and stay on top of my tasks. | 3 | Highest | 500 | 3 | 2 |
| 11 | As a sales manager, I want to segment leads based on criteria such as location & department, so that we can target the most relevant leads with personalized outreach. | 3 | Medium | 400 | 6 | 2 |
| 12 | As an admin, I want to import leads from external sources (e.g., spreadsheets, marketing platforms) and export lead data for reporting purposes, so that I can easily migrate data into Salesforce and perform detailed analysis. | 3 | Medium | 300 | 3 | 2 |
| 13 | As a sales representative, I want to store and update all relevant information about my leads like contact details, interactions, notes in Salesforce, so that I have a accurate view of each lead and can engage effectively. | 3 | Highest | 400 | 3 | 2 |
| 14 | As a sales manager, I want to assign scores to leads based on predefined criteria like level of interest, engagement, lead source, so that I can prioritize high-value leads and allocate resources accordingly. | 3 | Medium | 200 | 2 | 2 |
| 15 | As a sales representative, I want to automatically generate government-compliant proposals and documents from lead data, so that I can save time on paperwork and ensure consistency in submissions. | 4 | Highest | 400 | 5 | 3 |
| 16 | As a sales manager, I want to track and manage the entire contract lifecycle from initial lead to final contract execution and renewal, so that I can ensure no step is overlooked and follow all necessary steps to ensure success. | 4 | Highest | 400 | 5 | 3 |
| 17 | As a sales representative, I want to initiate a multi-stage tender approval workflow that includes legal, finance, and management review, so that we ensure all tender responses are thoroughly vetted before submission. | 4 | Medium | 400 | 6 | 3 |
| 18 | As a procurement manager, I want to track OEM orders from placement to delivery within Salesforce, so that I can ensure timely fulfillment of government contracts and avoid delays. | 3 | Medium | 300 | 6 | 3 |
| 19 | As a sales representative, I want to collaborate with OEM partners directly within Salesforce, so that I can negotiate terms, clarify product details, and manage government tender submissions efficiently. | 4 | Highest | 500 | 4 | 3 |
| 20 | As a procurement manager, I want to track OEM performance within Salesforce, so that I can ensure that our OEM partners are meeting the required standards for government contracts. | 6 | Highest | 500 | 8 | 3 |
| 21 | As an Account Manager, I want to create and maintain detailed profiles of OEM partners in Salesforce, So that I can track the partnership details, contracts, and product offerings associated with each OEM. | 4 | Medium | 400 | 4 | 3 |
| 22 | As a Partnership Manager, I want to track the status of partnerships with different OEMs, So that I can manage ongoing relationships and optimize collaboration. | 3 | Medium | 400 | 6 | 4 |
| 23 | As a Proposal Manager, I want to collaborate with OEM partners on responding to government tenders directly within Salesforce, So that I can streamline the proposal process and ensure that all partners are aligned on the proposal. | 4 | Medium | 400 | 6 | 4 |
| 24 | As a Sales Representative, I want to create a new lead record in Salesforce, So that I can start tracking the potential customer or opportunity. | 2 | Highest | 500 | 2 | 4 |
| 25 | As a Sales Representative, I want to view the details of a lead in Salesforce, So that I can review all the information and follow up accordingly. | 2 | Medium | 300 | 4 | 4 |
| 26 | As a Sales Representative, I want to edit the details of a lead in Salesforce, So that I can keep the information up-to-date as new information comes in. | 3 | Medium | 400 | 4 | 4 |
| 27 | As a Sales Representative, I want to search for leads by specific criteria, So that I can find leads based on attributes like name, company, status, or lead source. | 4 | Medium | 300 | 6 | 4 |
| 28 | As a user, I want to securely log out of Salesforce when I am finished, so that my session is ended, and my data remains secure. | 5 | Medium | 500 | 6 | 4 |

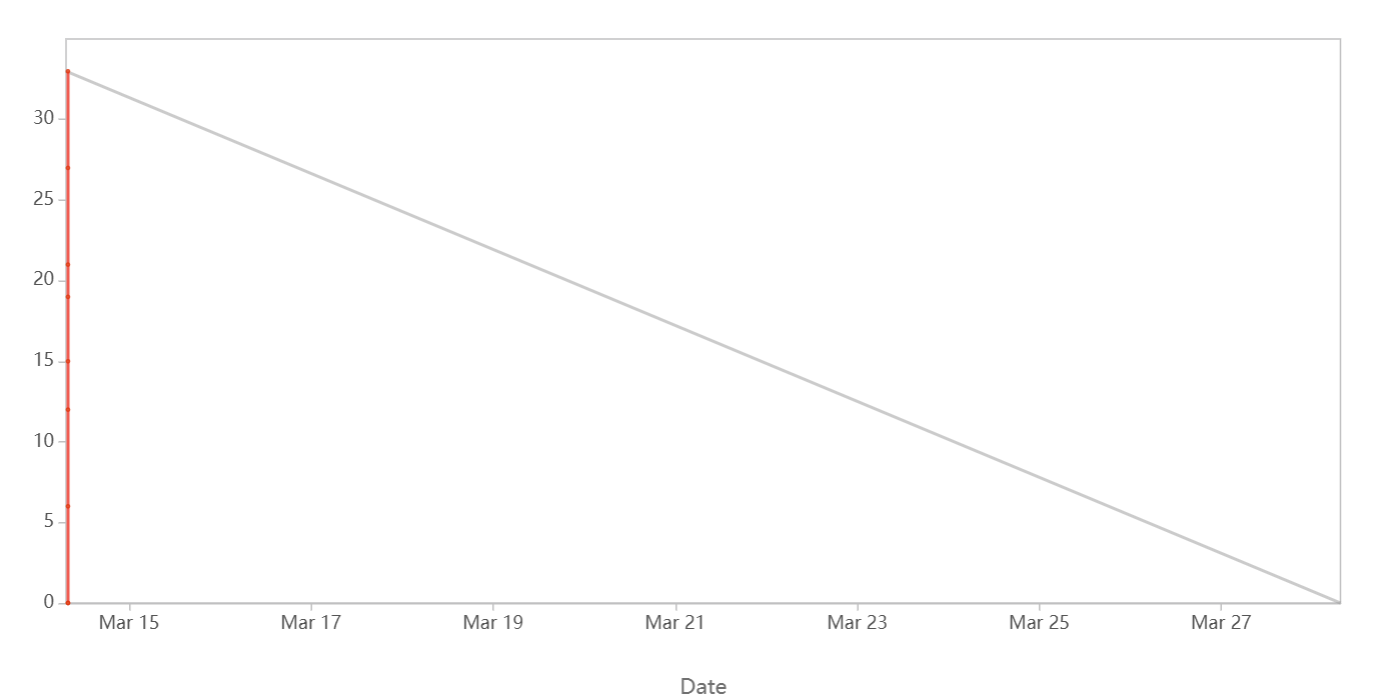
* Sprint Backlog:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Sprint 1** | | | | | |
| User Story ID | User Story | Tasks | Owner | Status | Estimated effort |
| 1 | As a user, I want to securely log in to Salesforce with my username and password, so that I can access my lead data, tasks, and other features within the system. | 7 | Ajit | Done | 5 story points |
| 2 | As a sales representative, I want to capture leads automatically from government tenders, email inquiries, and external portals, so that I can track all potential opportunities and avoid manual entry errors. | 4 | Vijay | Done | 4 story points |
| 3 | As a sales representative, I want to categorize and qualify leads based on government-specific criteria like specific turnover, previous experience etc. so that I can focus on leads that align with our business and capabilities. | 4 | Kalpana | Done | 4 story points |
| 4 | As a sales manager, I want to assign leads to the most appropriate team member based on their expertise like experience with certain government contracts, regional knowledge, so that we can respond to tenders more efficiently and with higher expertise. | 4 | Kalpana | Done | 4 story points |
| 5 | As a sales representative, I want to set automated follow-up reminders based on key tender deadlines, submission dates, and government-specific milestones, so that I never miss an important opportunity to engage with government stakeholders. | 5 | Ajit | Done | 5 story points |
| 6 | As a sales representative, I want to store and manage all required documents like compliance certificates, tender responses within the system, so that I can ensure that all necessary documentation is available for government tenders and audits. | 6 | Nehal | Done | 6 story points |
| 7 | As a sales representative, I want to track all communication with government representatives related to a lead, so that I can maintain a complete history of interactions and ensure effective follow-up. | 5 | Nikunj | Done | 3 story points |
| **Sprint 2** | | | | | |
| 8 | As a sales manager, I want to generate reports that provide insights into lead progress, tender success rates, and other government-specific sales metrics, so that I can evaluate team performance and optimize our approach to government contracts. | 4 | Nehal | Done | 4 story points |
| 9 | As a sales representative, I want to convert qualified leads into opportunities, so that we can start tracking the tender submission process and work toward closing the deal with the government. | 4 | Nehal | Done | 6 story points |
| 10 | As a sales representative, I want to receive notifications when a lead’s status changes, a follow-up is due, or there’s a new lead assigned to me, so that I can take prompt action on my leads and stay on top of my tasks. | 3 | Nikunj | Done | 3 story points |
| 11 | As a sales manager, I want to segment leads based on criteria such as location & department, so that we can target the most relevant leads with personalized outreach. | 3 | Ajit | Done | 6 story points |
| 12 | As an admin, I want to import leads from external sources (e.g., spreadsheets, marketing platforms) and export lead data for reporting purposes, so that I can easily migrate data into Salesforce and perform detailed analysis. | 3 | Ajit | Done | 3 story points |
| 13 | As a sales representative, I want to store and update all relevant information about my leads like contact details, interactions, notes in Salesforce, so that I have a accurate view of each lead and can engage effectively. | 3 | Vijay | Done | 3 story points |
| 14 | As a sales manager, I want to assign scores to leads based on predefined criteria like level of interest, engagement, lead source, so that I can prioritize high-value leads and allocate resources accordingly. | 3 | Nikunj | Done | 2 story points |
| **Sprint 3** | | | | | |
| 15 | As a sales representative, I want to automatically generate government-compliant proposals and documents from lead data, so that I can save time on paperwork and ensure consistency in submissions. | 4 | Nehal | Done | 5 story points |
| 16 | As a sales manager, I want to track and manage the entire contract lifecycle from initial lead to final contract execution and renewal, so that I can ensure no step is overlooked and follow all necessary steps to ensure success. | 4 | Nehal | WIP | 5 story points |
| 17 | As a sales representative, I want to initiate a multi-stage tender approval workflow that includes legal, finance, and management review, so that we ensure all tender responses are thoroughly vetted before submission. | 4 | Vijay | WIP | 6 story points |
| 18 | As a procurement manager, I want to track OEM orders from placement to delivery within Salesforce, so that I can ensure timely fulfillment of government contracts and avoid delays. | 3 | Vijay | WIP | 6 story points |
| 19 | As a sales representative, I want to collaborate with OEM partners directly within Salesforce, so that I can negotiate terms, clarify product details, and manage government tender submissions efficiently. | 4 | Kalpana | WIP | 4 story points |
| 20 | As a procurement manager, I want to track OEM performance within Salesforce, so that I can ensure that our OEM partners are meeting the required standards for government contracts. | 6 | Kalpana | WIP | 8 story points |
| 21 | As an Account Manager, I want to create and maintain detailed profiles of OEM partners in Salesforce, So that I can track the partnership details, contracts, and product offerings associated with each OEM. | 4 | Kalpana | WIP | 4 story points |
| **Sprint 4** | | | | | |
| 22 | As a Partnership Manager, I want to track the status of partnerships with different OEMs, So that I can manage ongoing relationships and optimize collaboration. | 3 | Ajit | WIP | 6 story points |
| 23 | As a Proposal Manager, I want to collaborate with OEM partners on responding to government tenders directly within Salesforce, So that I can streamline the proposal process and ensure that all partners are aligned on the proposal. | 4 | Ajit | WIP | 6 story points |
| 24 | As a Sales Representative, I want to create a new lead record in Salesforce, So that I can start tracking the potential customer or opportunity. | 2 | Ajit | WIP | 2 story points |
| 25 | As a Sales Representative, I want to view the details of a lead in Salesforce, So that I can review all the information and follow up accordingly. | 2 | Nehal | WIP | 4 story points |
| 26 | As a Sales Representative, I want to edit the details of a lead in Salesforce, So that I can keep the information up-to-date as new information comes in. | 3 | Nehal | WIP | 4 story points |
| 27 | As a Sales Representative, I want to search for leads by specific criteria, So that I can find leads based on attributes like name, company, status, or lead source. | 4 | Nikunj | WIP | 6 story points |
| 28 | As a user, I want to securely log out of Salesforce when I am finished, so that my session is ended, and my data remains secure. | 5 | Nikunj | WIP | 6 story points |

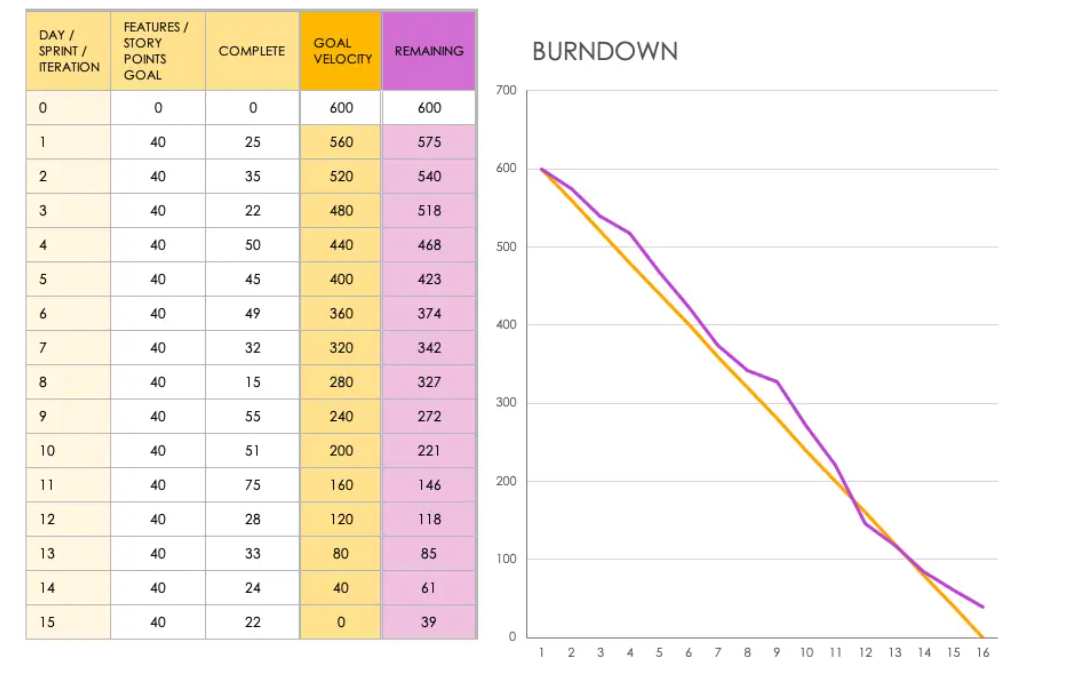
* Sprint Burn Up Chart:



* Sprint Burn Down Chart:



* Product burndown chart:



Document 6: Sprint meetings:-

Answer:

* Meeting Type 1: Sprint Planning Meeting

|  |  |
| --- | --- |
| Date | 12/03/2025 |
| Time | 10 AM |
| Location | Pune |
| Prepared by | Komal Chauhan |
| Attendees | Komal, Pratikasha, Ajit, Vijay, Kalpana & Nikunj |

Agenda Topics:

|  |  |  |
| --- | --- | --- |
| Topic | Presenter | Time allotted |
| Automate Lead Capture and Assignment Process | Komal Chauhan | 2 weeks |

Other information:

|  |  |
| --- | --- |
| Observes | Current manual process  Lead sources  Automation requirements |
| Resources | Salesforce Development Team  Integration Specialists  Sales & Marketing Team  Quality Assurance Team |
| Special notes | Once the automation is implemented, there should be a brief training session for users to familiarize them with how leads are captured and assigned. |

* Meeting Type 2: Sprint Review Meeting

|  |  |
| --- | --- |
| Date | 26/03/2025 |
| Time | 10 AM |
| Location | Pune |
| Prepared by | Pratiksha Patel |
| Attendees | Komal Chauhan, Pratikasha, Ajit, Vijay, Kalpana & Nikunj |

|  |  |  |  |
| --- | --- | --- | --- |
| Sprint Status | Things to do | Quick updates | What’s next |
| Completed:  Lead capture automation, assignment rules,  Initial testing | Prepare User Training Materials | Presented an updated Sprint Goal at the last meeting | Complete Testing. |
| In-Process:  Integration with government portals. | Complete the testing of integration with the government portals and email systems. | Completed 75% of the integration tasks | Implement UAT. |
| Issues:  Integration with external portals is taking longer than expected due to API compatibility issues. | Conduct End-to-End Testing | Sales teams have provided feedback for future sprint | Plan for the Next Sprint |

* Meeting Type 3: Sprint retrospective meeting

|  |  |
| --- | --- |
| Date | 27/03/2025 |
| Time | 11 AM |
| Location | Pune |
| Prepared by | Pratikasha, Ajit, Vijay, Kalpana & Nikunj |
| Attendees | Komal Chauhan |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Agenda | What went well? | What didn’t go well? | Questions | Reference |
| Review the Sprint Goal and Completed Work | Ask the team to reflect on the positive aspects of the sprint. Like successful delivery of user stories. | Identify the challenges OR issues faced during the sprint. | Ask questions to team for feedback, areas of improvement. | Sprint Goal & Sprint review meeting. |

* Meeting Type 4: Daily Stand-up meeting

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Question | Name | 2 weeks (From 12/03/2025 to 26/03/2025) | | | | |
| Monday | Tuesday | Wednesday | Thursday | Friday |
| What did you do yesterday? | Ajit | I worked on automating the lead data capture from web forms | I worked on lead assignment part. | I completed the integration of the lead capture form external source. | I completed the auto-assigning leads based on the region | I Implemented data form field validations. |
| Vijay | I completed the lead capture form integration with Salesforce. | I worked on to Set up API integration to send lead data | I mapped the captured data fields | I defined and implement automatic lead assignment. | I set up workflow to assign the lead to the appropriate team member. |
| Kalpana | I am waiting for approval to access the necessary lead source data. | I configure API connections . | I confirmed data integrity | Implemented error handling in lead capturing. | Wrote unit tests to verify the functionality. |
| What will you do today? | Vijay | I will be focusing on setting up automatic lead assignment. | I will work on automated email alert. | I will test the entire flow. | I will ensure smooth process. | I will ensure data flows correctly. |
| Ajit | I will work on automating the lead assignment. | I will verify that leads are captured correctly. | I will deploy the feature to a test environment | I will review and optimize the performance. | I will ensure security level. |
| Nikunj | I will work on refactoring. | I will document the implemented code. | I will work with the QA team to identify and resolve issues during testing. | I will coordinate with the UX team for UI design approval. | I will work on alerts when lead is assigned to a team member. |
| What (if any) is blocking your progress? | Kalpana | I am facing difficulty in integrating third-party APIs. | I have issue in Data Mapping. | I face issues with form field validation | I have issue in setting up a test environment | I face challenges on data Security. |
| Nehal | I am facing error in data synchronization. | Having issue n Lead Assignment Rules. | I face challenges on data storage & privacy. | I want access to the production test environments. | I have a doubt on the exact behaviour of lead assignment. |