1. **Agile Document: Definition of Done (DoD)**

📌 Project: CRM Enhancement for Tax Filing Company

🎯 Objective

Establish a common understanding among the Agile team of what "done" means for every user story, feature, or task in the CRM enhancement initiative to ensure consistent quality and delivery.

📋 Scope

Applies to all user stories, bug fixes, and enhancements related to the CRM used by sales, onboarding, support, and tax consultants in a tax filing company.

✅ Definition of Done Checklist

Category	Definition of Done Criteria
Requirement Clarity	✓ User story is clearly defined, understood, and has acceptance criteria.
Design & Analysis	✓ Functional impact assessed and documented. ✓ Wireframes or mockups (if applicable) reviewed.
Development	✓ Code written, committed, and peer-reviewed. ✓ Follows coding standards and naming conventions.
Unit Testing	✓ Unit tests written and passed. ✓ Code coverage > 80% (if applicable).
Integration	✓ Integrated with CRM modules (e.g., client records, employee tax info, document uploads).
Acceptance Testing	✓ QA verified against acceptance criteria. ✓ Logged bugs are fixed or documented for backlog.
UAT	✓ Business stakeholders or tax domain SMEs verified and signed off in UAT environment.
Documentation	✓ Technical/functional documentation updated. ✓ Release notes prepared (if needed).
Security & Compliance	✓ GDPR or local data privacy requirements met. ✓ Access controls tested.
Deployment Readiness	✓ Code deployed to staging. ✓ Deployment checklist completed.
Done-Done	✓ Product Owner reviews and accepts story. ✓ Jira ticket moved to “Done”.

🔁 Notes on Iterative Application

• The Definition of Done is reviewed at the start of every release cycle.
• Updates are made collaboratively by the Product Owner, QA Lead, and Scrum Master.
• Exceptions (e.g., partial compliance) must be flagged and approved before deployment.

DOCUMENT -2 Product Vision

Vision Statement:

To transform our CRM system into a comprehensive, user-friendly, and intelligent platform that streamlines client management, tax document processing, and compliance tracking for our users.

Business Objectives:

□□Improve operational efficiency in client onboarding and tax documentation.

□□Enhance user experience and reduce time spent navigating the CRM.

□□Automate repetitive tasks such as reminders, form submissions, and status tracking.

□□Ensure data accuracy and real-time reporting for compliance purposes.

□□Support scalability for future tax seasons and increased client volume.

Target Users:

- Internal staff including tax preparers, client success teams, and onboarding specialists
- Clients who use the portal to upload documents, track status, and communicate with tax consultants

Key Features:

□□Client profile management with secure document uploads

□□Integrated task assignment and progress tracking

□□Automated status notifications and document submission reminders

□□Custom dashboard for tax preparers with workload metrics

□□Real-time chat support and client communication history

□□Compliance-ready data validation and logging

Success Metrics:

□□30% reduction in onboarding time per client

□□25% fewer manual errors in data entry

□□50% faster resolution of client support tickets

□□High user satisfaction score (>90%) from internal users

□□Compliance issues logged reduced by 40% over two tax cycles

Risks & Assumptions:

- Integration dependencies with legacy systems may require additional development effort.
- Assumes continued access to updated tax regulations and compliance frameworks.

• User training and adoption may take time initially but will improve over usage cycles.

Document -3 User Stories

This document outlines key user stories for the CRM enhancement project to improve client management, document handling, and operational workflows in a tax filing company. Each user story is defined from the perspective of end users and stakeholders.

📋 User Stories:

User Story ID	As a...	I want to...	So that I can...
US001	Client Onboarding Specialist	input client data and upload documents	ensure accurate and timely client onboarding
US002	Tax Preparer	view assigned client documents and task deadlines	complete tax filings efficiently
US003	Client	receive notifications for document submission deadlines	avoid delays in my tax filing process
US004	Admin	generate performance reports for staff activity	track efficiency and manage workloads better
US005	Customer Support Agent	communicate with clients via chat within CRM	respond to queries faster without switching platforms

✅ Example Acceptance Criteria:

- The system must allow document uploads in PDF or JPG format.
- Notifications should be sent via email and CRM dashboard.
- Chat messages must be stored and searchable by client ID.
- Reports should include filters for date, user, and client type.

Document – 4 Agile PO Experience

Agile Product Owner

Industry: Tax Filing / CRM Enhancement

Environment: Agile Scrum | Jira | Zephyr | Confluence | UAT | Stakeholder Collaboration

🎯 Core Responsibilities

Area	Details
Vision & Roadmap	Defined and maintained product vision aligned with strategic goals for CRM enhancement.
Backlog Management	Created, refined, and prioritized product backlog in Jira ensuring transparency and alignment.

User Story Creation	Authored clear, testable user stories with detailed acceptance criteria and business value.
Stakeholder Collaboration	Acted as the primary liaison between business, development, QA, and leadership teams.
Sprint Planning	Participated in sprint planning, backlog grooming, and daily stand-ups to ensure deliverables.
Release Management	Coordinated CRM release cycles, UAT testing, and sign-offs with tax operations teams.
User Acceptance Testing	Defined UAT scope, test scenarios, and obtained stakeholder sign-off for production readiness.
Feedback Loop	Gathered post-release feedback to drive continuous improvement and iterative development.

Tools & Techniques

□□Jira: User story tracking, sprint planning, backlog refinement

□□Zephyr for Jira: Test case and defect management integration

□□Confluence: Product documentation, vision board, sprint goals

□□MS Excel / Power BI: Reporting sprint velocity and user satisfaction

□□User Personas / Journey Mapping: To validate user needs during prioritization

□□Agile Ceremonies: Daily stand-ups, retrospectives, reviews, sprint demos

Impact Highlights

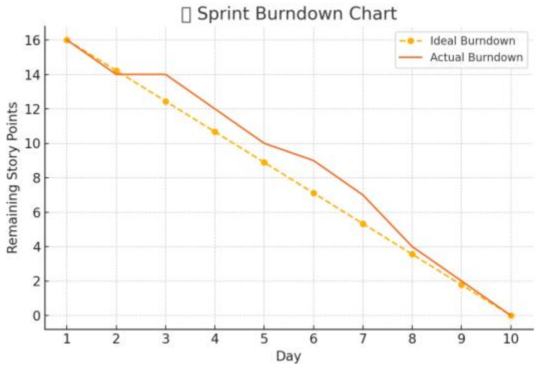
□□Reduced manual entry by 40% through CRM automation enhancements

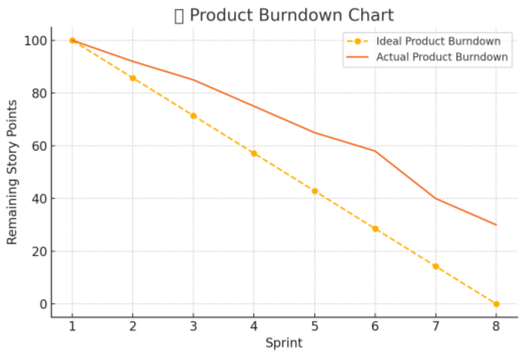
□□Improved feature delivery timelines by 25% using refined backlog practices

□□Increased stakeholder satisfaction with clear visibility via Jira dashboards

□□Ensured regulatory readiness (e.g., 100% tax compliance logic traceable in CRM)

Document 5





Product Backlog

#	Backlog ID	Title	Priority	Status
1	PB001	User Login	High	To Do
2	PB002	Client Dashboard	High	To Do
3	PB003	Document Upload	Medium	In Progress
4	PB004	Tax Status Notification	Medium	In Progress
5	PB005	Admin Reporting	Low	Done

Sprint Backlog

#	Sprint ID	Title	Story Points	Status
1	SB001	User Login	5	Done
2	SB002	Client Dashboard	8	In Progress
3	SB003	Document Upload	3	To Do

Document -6 Sprint meetings

Sprint meetings are essential Agile ceremonies that facilitate planning, collaboration, review, and continuous improvement throughout the software development cycle. This document outlines the key sprint meetings, their purpose, participants, and best practices.

Sprint Planning

Objective: Define the sprint goal and select user stories from the product backlog.
Participants: Product Owner, Scrum Master, Development Team
Key Activities:
- Discuss product backlog items
- Estimate effort and capacity
- Define sprint goal
- Commit to sprint backlog

Daily Scrum (Stand-Up)

Objective: Synchronize team progress and identify blockers.
Participants: Development Team (optional: Scrum Master, Product Owner)
Timebox: 15 minutes
Each member answers:
- What did I do yesterday?
- What will I do today?
- Are there any impediments in my way?

Sprint Review

Objective: Demonstrate completed work and gather feedback from stakeholders.
Participants: Scrum Team, Stakeholders
Key Activities:
- Present what was completed
- Review metrics and progress toward the goal
- Capture stakeholder feedback
- Update product backlog if needed

Sprint Retrospective

Objective: Reflect on the sprint and identify improvements.
Participants: Scrum Team
Key Questions:
- What went well?
- What didn't go well?
- What can we improve in the next sprint?

Best Practices for Sprint Meetings

□□Timebox each meeting and start on time.

□□Use a shared board (e.g., Jira, Trello) to visualize progress.

□□Keep focus on goals and outcomes rather than task details.

□□Document action items and follow-ups from each meeting.

□□Promote psychological safety and open communication.

Redo for 3

Document 3: User Stories – CRM Enhancement for Tax Filing Company

User Story No: US-001

Tasks:	Design client dashboard with real-time tax filing status updates
Priority:	High
Value Statement:	As a user, I want to view the real-time status of my tax filing and submitted documents, so that I can track progress and respond promptly to pending actions.
BV (Business Value): CP (Complexity Points):	60(Improved client satisfaction and reduced support tickets related to tax status inquiries) 5 (Moderate – requires API integration, UI/UX design, and testing)

Acceptance Criteria:

1. The dashboard must show statuses like "Documents Received," "In Review," "Filed," and "Completed."
2. Users should receive automated alerts for pending actions (e.g., missing documents).
3. Data must refresh in real-time or every 5 minutes.
4. User must be able to download the latest copy of their filed returns and communication logs.

User Story No: US002
Tasks: Integrate CRM with tax filing system, Set up automatic data sync
Priority: High
Value Statement:
As a user service executive, I want to view a customer's full filing history in a unified dashboard, so that I can quickly assist with queries and provide faster resolution.
BV: 13 CP: 5
Acceptance Criteria:
- Customer dashboard should show last 5 years of filing history - Dashboard must refresh data from CRM every 10 minutes - Response time for any query should not exceed 3 seconds

User Story No: US003
Tasks: Design and implement email trigger workflows, Add email templates to CRM, Connect CRM to mailing system (e.g., SendGrid)
Priority: Medium
Value Statement:
As a tax advisor, I want automated email reminders for pending documents, so that I can ensure timely filing for clients.
BV: 8 CP: 3
Acceptance Criteria:
- Email should be triggered 5 days and 1 day before the document due date - Each email must include client name, document name, and deadline - System should log delivery status in CRM

User Story No: US004
Tasks: Enable e-signature integration, Add signature request tracking feature, Implement secure access and audit log
Priority: High

Value Statement:
As a customer, I want to securely sign tax documents digitally within the CRM, so that I can avoid printing and mailing physical forms.
BV: 21   CP: 8
Acceptance Criteria:
- Customers should be able to sign using OTP or secure link - Signature status must be updated in real-time in CRM - Signed documents must be stored with audit trail

User Story No: US005
Tasks: Add document upload feature to customer portal, Integrate document storage with CRM, Enable document type classification
Priority: High
Value Statement:
As a customer, I want to upload my tax documents securely through the portal, so that I can avoid emailing sensitive information.
BV: 15   CP: 6
Acceptance Criteria:
- Users must be able to upload PDFs and images up to 10MB - Files should be stored in encrypted folders - CRM must automatically categorize documents (e.g., W2, 1099)

User Story No: US006
Tasks: Set up CRM dashboard for tax filing KPIs, Integrate with reporting tool, Configure visual alerts for overdue filings
Priority: Medium
Value Statement:

As a manager, I want to monitor filing status and deadlines in real time, so that I can take quick actions for overdue cases.
BV: 12 CP: 4
Acceptance Criteria:
- Dashboard should display KPIs: filings completed, pending, overdue - Visual alerts must turn red for cases overdue by more than 3 days - Reports must be downloadable in Excel and PDF format

Redo-5

Product and Sprint Backlog and Burndown Charts

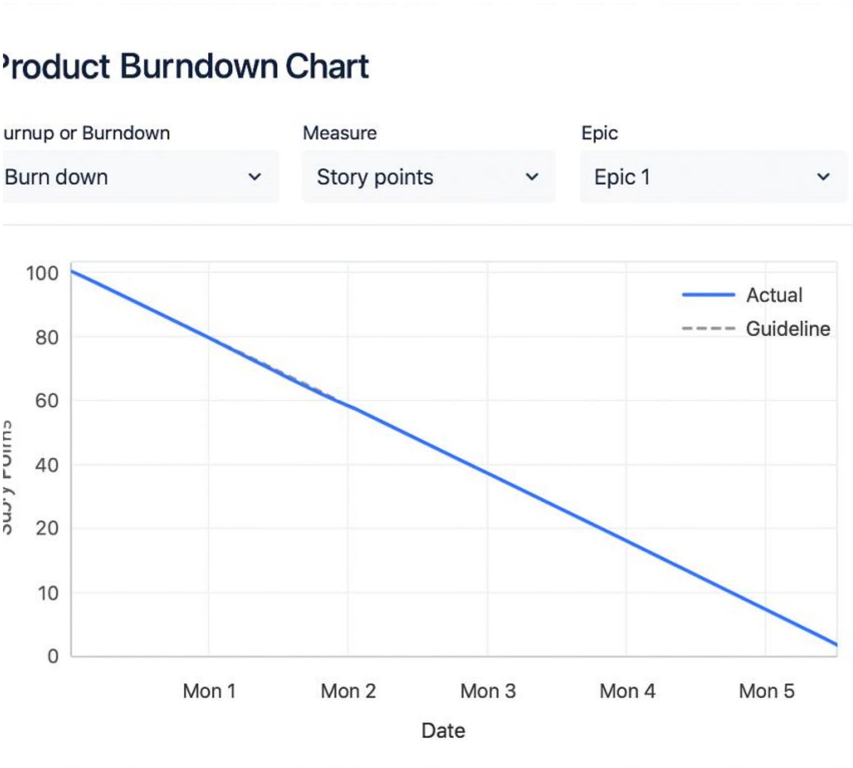
Product Backlog:

User story ID	User story	Tasks	Priority	BV	CP	Sprint
US-001	As a user, I want to track tax filing status	Design dashboard UI, Set up API, Testing	High	8	5	Sprint 1
US-002	As a user, I want to upload tax documents securely	Develop upload feature, Encrypt files, Add validation	Medium	6	4	Sprint 2
US-003	As a user, I want to receive email alerts for pending tasks	Setup mail server, Create templates, Integrate triggers	Medium	5	3	Sprint 3
US-004	As admin, I want to manage user access rights	Build roles module, UI for admin, Test permissions	High	7	4	Sprint 4

Sprint Backlog:

User story ID	User story	Tasks	Owner	Status	Estimated effort
US-001	Track tax filing status	Dashboard UI, API, Testing	Anita	In Progress	16 hrs
US-002	Upload tax documents	Upload feature, Encryption, Validation	Raj	Not Started	14 hrs
US-003	Email alerts for pending tasks	Mail server, Templates, Integration	Priya	In Progress	12 hrs


Sprint
Burndown Chart
Backlog
Active sprints
Reports
Sprint Burndown Chart
Chart options
Sprint 1 24 Jun 2025 – 30 Jun 2025
Remaining values
40
30
20
10
0
–0
Monday
Tuesday
Wednesdeday
Thursday
Friday
Satat
Saturday
Sunday
Guideline
Actual


roduct Burndown Chart
urnup or Burndown
Burn down
Measure
Story points
Epic
Epic 1
100
80
60
40
20
10
0
Actual
Guideline
Mon 1
Mon 2
Mon 3
Mon 4
Mon 5
Date

Redo for 6

Document 6: Sprint Meetings 1

Meeting Type 1: Sprint Planning Meeting

Date	25 June 2025
Time	10:00 AM – 11:30 AM IST
Location	Zoom (Link shared via email)
Prepared By	Aditi Joshi, Business Analyst
Attendees	Product Owner, Scrum Master, Dev Team, QA, BA

Agenda Topics

Topic	Presenter	Time allotted
Sprint Goals, Task Estimation, Capacity Planning	Scrum Master & BA	90 mins

Other Information

Observers	None
Resources	Jira Board, Sprint Backlog, Previous Retrospective Notes
Special Notes	Ensure all story points are estimated and capacity is validated.

Meeting Type 2: Sprint Review Meeting

Date	2 July 2025
Time	4:00 PM – 5:00 PM IST
Location	Conference Room 1 / Zoom Hybrid Meeting
Prepared By	Aditi Joshi, Business Analyst
Attendees	PO, Scrum Master, Dev Team, QA, Stakeholders

Sprint status	Things to demo	Quick updates	What's next
Completed all committed user stories. One item moved to next sprint due to late dependency.	Client dashboard view, tax status update module, email notifications.	Minor bug reported in email triggers. All items tested and UAT signed off.	Start Sprint 2 with focus on document uploads and user role permissions.

Meeting Type 3: Sprint Retrospective Meeting

Date	3 July 2025
Time	11:00 AM – 12:00 PM IST
Location	Zoom Virtual Room
Prepared By	Aditi Joshi, Business Analyst
Attendees	Scrum Team, Product Owner, Scrum Master

Agenda	What went well	What didn't go well	Questions	Reference
Sprint Planning & Execution	Team collaboration was strong, and all critical tasks were completed on time.	Some user stories were unclear at the start of the sprint.	Can we improve requirement clarity before sprint start?	Sprint Backlog, Daily Scrum Notes
Bug Tracking and QA	Zephyr test cases were effectively used.	Delayed feedback on bug fix acceptance.	Can we set fixed bug review checkpoints mid-sprint?	Jira Defect Log, QA Report

Meeting Type 4: Daily Stand-up Meeting

Week: 24-06-2025 to 30-06-2025

What did you do yesterday?

Name/Role	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Developer 1	Reviewed tax module	Continued API testing	Completed test cases	Peer reviewed Dev 2's code	Documentation		
Developer 2	Set up mail server	Bug fixing	Finalized email templates	Reviewed backlog	Attended stakeholder meeting		
Developer 3	Dashboard UI sketch	Integrated layout	Bug fix on styling	Cross-browser testing	Tested alerts module		

What will you do today?

Name/Role	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Developer 1	Complete dashboard API	Coordinate with QA	Refactor code	Write unit tests	Sprint documentation		
Developer 2	Implement email triggers	Code cleanup	Attend code review	Add validations	Plan for next sprint		
Developer 3	Finish UI bugs	UAT testing	Push to staging	Team sync-up	Prepare demo		

What (if any) is blocking your progress?

Name/Role	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Developer 1		Waiting for database update					
Developer 2				Need QA test data			
Developer 3	Permission issues						