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: | | |
| Scrum Team | | | |
| Scrum Master: | Priya Sharma  Rajesh Verma  Ankit Mehta  Neha Joshi  Rohit Malhotra  Pooja Singh  Sameer 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. |

Document 3: User stories

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| User story No:1  Add New Customer | Tasks:  Create a customer form, Validate inputs, Store data in database. | Priority:  High |
| Value Statement:  As a Sales Representative, I want to add new customers to the CRM so that I can manage their information. | | |
| BV: 8  CP: 3 | | |
| Acceptance Criteria:  Form saves customer data successfully, Error messages for invalid inputs, Data visible in customer list. | | |

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| User story No:2 View Customer List | Tasks:  Create customer list view, implement pagination, Add search and filter options. | Priority:  High |
| Value Statement:  As a Sales Manager, I want to view a list of all customers so that I can track progress. | | |
| BV: 7  CP: 2 | | |
| Acceptance Criteria:  Customer list is displayed, Search and filter options work correctly, Pagination works without performance issues. | | |

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| User story No:3 Update Customer Information | Tasks:  Implement customer edit form, validate inputs, Save updates to database. | Priority:  High |
| Value Statement:  As a Customer Support Agent, I want to update customer information so that records remain accurate. | | |
| BV: 9  CP: 3 | | |
| Acceptance Criteria:  Updates are saved correctly, Notifications for successful updates, Change logs maintained. | | |

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| User story No:4 Merge Duplicate Customers | Tasks:  Implement duplicate detection, provide a merge option, Handle conflicting data. | Priority:  Medium |
| Value Statement:  As a Sales Representative, I want to merge duplicate customer records so that I maintain clean data. | | |
| BV: 7  CP: 4 | | |
| Acceptance Criteria:  Duplicates detected correctly, Merge completed without data loss, Logs maintained for merges. | | |

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| User story No:5 Search Customers | Tasks:  Implement search feature, add filter options (e.g., name, region), Optimize search performance. | Priority:  High |
| Value Statement:  As a Customer Support Agent, I want to search for a customer using various filters so that I can retrieve data quickly. | | |
| BV: 10  CP: 2 | | |
| Acceptance Criteria:  Search results are accurate, Filters work correctly, Performance is acceptable (less than 2s). | | |

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| User story No:6 Create Leads | Tasks:  Develop lead capture form, integrate with inquiry sources, Save leads in database. | Priority:  High |
| Value Statement:  As a Sales Representative, I want to create leads from incoming inquiries so that I can follow up effectively. | | |
| BV: 8  CP: 3 | | |
| Acceptance Criteria:  Leads are stored correctly, Notifications sent for new leads, Errors are handled. | | |

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| User story No:7 Assign Leads | Tasks:  Implement lead assignment functionality, Enable notifications, Track lead ownership. | Priority:  High |
| Value Statement:  As a Sales Manager, I want to assign leads to team members so that work is distributed evenly. | | |
| BV: 9  CP: 3 | | |
| Acceptance Criteria:  Leads assigned correctly, Notifications received by assignees, Logs available for tracking. | | |

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| User story No:8 Qualify Leads | Tasks:  Create lead qualification checklist, implement lead scoring, Provide real-time lead status updates. | Priority:  Medium |
| Value Statement:  As a Sales Representative, I want to qualify leads based on criteria so that I prioritize valuable prospects. | | |
| BV: 7  CP: 4 | | |
| Acceptance Criteria:  Leads are scored accurately, Qualification criteria are applied, Lead status updates in real-time. | | |

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| User story No:9 Track Lead Progress | Tasks:  Implement lead pipeline view, add stage-based filters, Generate lead reports. | Priority:  High |
| Value Statement:  As a Sales Manager, I want to track the progress of leads through different stages so that I can identify bottlenecks. | | |
| BV: 10  CP: 4 | | |
| Acceptance Criteria:  Pipeline shows accurate lead progress, Filters work as expected, Reports generate in under 5 seconds. | | |

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| User story No:10 Receive Lead Notifications | Tasks:  Develop notification system, enable push and email notifications, Track notification history. | Priority:  High |
| Value Statement:  As a Sales Representative, I want to receive notifications for new leads assigned to me so that I can respond quickly. | | |
| BV: 9  CP: 2 | | |
| Acceptance Criteria:  Notifications sent immediately, Notification history maintained, Users can customize preferences. | | |

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| User story No:11 Manage Contacts | Tasks:  Develop contact form, implement validation, Create edit and delete options. | Priority:  High |
| Value Statement:  As a Sales Representative, I want to add and edit contacts for existing customers so that I can maintain relationship details. | | |
| BV: 8  CP: 3 | | |
| Acceptance Criteria:  Contacts added or edited successfully, Error messages for invalid inputs, Contacts visible under the correct customer profile. | | |

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| User story No:12 Log Customer Interactions | Tasks:  Create interaction log feature, Enable notes and timestamps, Display interaction history. | Priority:  Medium |
| Value Statement:  As a Customer Support Agent, I want to log customer interactions so that I can track communication history. | | |
| BV: 7  CP: 3 | | |
| Acceptance Criteria:  Logs are saved correctly, Visible under customer profiles, Searchable by date and keywords. | | |

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| User story No:13 Generate Reports | Tasks:  Develop reporting dashboard, Add export options, Implement report scheduling | Priority:  High |
| Value Statement:  As a Sales Manager, I want to generate reports on customer activity so that I can analyse trends. | | |
| BV: 9  CP: 4 | | |
| Acceptance Criteria:  Reports generated accurately, Exported in PDF and Excel, Scheduled reports delivered on time. | | |

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| User story No:14 Set Reminders | Tasks:  Develop reminder system, Enable notifications, Display upcoming tasks. | Priority:  High |
| Value Statement:  As a Sales Representative, I want to set reminders for follow-ups so that I never miss customer engagements. | | |
| BV: 8  CP: 2 | | |
| Acceptance Criteria:  Reminders are sent on time, Tasks marked as completed, Notifications visible on dashboard. | | |

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| User story No:15 Track Sales Performance | Tasks:  Develop performance dashboard, Implement KPI tracking, Provide visual charts. | Priority:  High |
| Value Statement:  As a Sales Manager, I want to monitor sales performance so that I can identify top performers. | | |
| BV: 10  CP: 4 | | |
| Acceptance Criteria:  Dashboard displays accurate data, KPIs calculated correctly, Data filters work properly. | | |

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| User story No:16 Import Customer Data | Tasks:  Implement CSV import feature, Validate data, Display import summary. | Priority:  Medium |
| Value Statement:  As an Admin, I want to import bulk customer data from a CSV file so that I can quickly onboard customers. | | |
| BV: 8  CP: 3 | | |
| Acceptance Criteria:  CSV uploaded successfully, Errors highlighted, Data imported correctly. | | |

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| User story No:17 Export Reports | Tasks:  Develop export options, Generate PDF and Excel files, Ensure report accuracy. | Priority:  High |
| Value Statement:  As a Sales Manager, I want to export reports to Excel and PDF so that I can share insights with stakeholders. | | |
| BV: 9  CP: 2 | | |
| Acceptance Criteria:  Reports exported without errors, Data matches in all formats, Export completed within 10 seconds. | | |

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| User story No:18 Create Customer Segments | Tasks:  Develop segmentation module, enable demographic filters, Integrate with campaign tool. | Priority:  High |
| Value Statement:  As a Marketing Manager, I want to create customer segments based on demographics so that I can run targeted campaigns. | | |
| BV: 9  CP: 3 | | |
| Acceptance Criteria:  Segments created accurately, Campaigns targeted to correct audience, Performance reports generated. | | |

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| User story No:19 Manage User Roles | Tasks:  Develop role management system, implement access restrictions, Provide audit logs. | Priority:  High |
| Value Statement:  As an Admin, I want to assign user roles and permissions so that access is controlled. | | |
| BV: 10  CP: 3 | | |
| Acceptance Criteria:  Roles assigned correctly, Unauthorized access prevented, Audit logs generated. | | |

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| User story No:20 Customer Support Dashboard | Tasks:  Design dashboard, integrate with issue database, Add filter options. | Priority:  High |
| Value Statement:  As a Support Manager, I want a dashboard displaying customer issues so that I can monitor resolution progress. | | |
| BV: 9  CP: 4 | | |
| Acceptance Criteria:  Dashboard displays accurate issue data, Filters work correctly, Data updates in real-time. | | |

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| User story No:21 Automate Follow-Up Emails | Tasks:  Configure email templates, Schedule automated emails, Track email status. | Priority:  Medium |
| Value Statement:  As a Sales Representative, I want automated follow-up emails to be sent to leads so that I can stay engaged. | | |
| BV: 7  CP: 3 | | |
| Acceptance Criteria:  Emails sent as per schedule, Tracking reflects accurate status, Reports generated. | | |

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| User story No:22 Track Email Interactions | Tasks:  Develop email tracking module, Capture open and click data, Display analytics. | Priority:  High |
| Value Statement:  As a Marketing Manager, I want to track customer responses to campaign emails so that I can measure effectiveness. | | |
| BV: 9  CP: 4 | | |
| Acceptance Criteria:  Accurate email interaction data, Campaign reports generated, Performance visualizations available. | | |

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| User story No:23 Customize CRM Dashboard | Tasks:  Implement drag-and-drop widgets, save custom layouts, Provide reset option | Priority:  High |
| Value Statement:  As a User, I want to customize my CRM dashboard layout so that I can view relevant data. | | |
| BV: 8  CP: 3 | | |
| Acceptance Criteria:  Layout customization works correctly, Data widgets display accurate information, Reset function available. | | |

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| User story No:24 Implement Chat Support | Tasks:  Develop chat UI, implement real-time messaging, Enable chat history storage. | Priority:  High |
| Value Statement:  As a Customer Support Agent, I want a chat feature to respond to customers in real-time so that I can resolve issues quickly. | | |
| BV: 10  CP: 4 | | |
| Acceptance Criteria:  Chats sent and received without delays, Chat history viewable, Notifications for incoming messages. | | |

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| User story No:25 Manage Service Tickets | Tasks:  Build ticket management system, provide status updates, Generate reports. | Priority:  High |
| Value Statement:  As a Support Agent, I want to create, update, and close service tickets so that I can track customer issues. | | |
| BV: 9  CP: 3 | | |
| Acceptance Criteria:  Tickets created and updated correctly, Status changes tracked, Reports generated. | | |

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| User story No:26 Analyse Sales Trends | Tasks:  Develop trend analysis module, provide visual graphs, Enable custom time filters. | Priority:  High |
| Value Statement:  As a Sales Analyst, I want to view sales trends over time so that I can identify patterns. | | |
| BV: 10  CP: 4 | | |
| Acceptance Criteria:  Accurate trend data displayed, Graphs are interactive, Filters applied correctly. | | |

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| User story No:27 Integrate with Payment Gateway | Tasks:  Connect to gateway API, Implement secure payment processing, Log transactions. | Priority:  High |
| Value Statement:  As a Finance Manager, I want the CRM to integrate with payment gateways so that I can process payments directly. | | |
| BV: 10  CP: 5 | | |
| Acceptance Criteria:  Payments processed securely, Transaction logs maintained, Error handling in place. | | |

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| User story No:28 Create Audit Log | Tasks:  Develop logging module, Track user actions, Provide search and filter options. | Priority:  High |
| Value Statement:  As an Admin, I want detailed audit logs so that I can monitor user activities. | | |
| BV: 8  CP: 3 | | |
| Acceptance Criteria:  Logs capture all relevant actions, Search function works correctly, Filters apply accurately. | | |

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| User story No:30 Schedule Campaigns | Tasks:  Implement campaign scheduling, Enable automated launch, Provide status tracking. | Priority:  Medium |
| Value Statement:  As a Marketing Manager, I want to schedule campaigns in advance so that I can manage marketing efforts efficiently. | | |
| BV: 7  CP: 3 | | |
| Acceptance Criteria:  Campaigns launch on schedule, Notifications received, Reports display campaign data. | | |

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| User story No:31 Manage Multiple Currencies | Tasks:  Implement currency converter, Track exchange rates, Display currency-specific reports. | Priority:  High |
| Value Statement:  As a Finance Manager, I want to manage transactions in multiple currencies so that I can operate globally. | | |
| BV: 9  CP: 4 | | |
| Acceptance Criteria:  Accurate conversions displayed, Exchange rates updated, Reports reflect correct currency values. | | |

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| User story No:32 Generate Invoices | Tasks:  Develop invoice generation module, integrate with order data, Provide PDF export | Priority:  High |
| Value Statement:  As a Sales Representative, I want to generate invoices for customer orders so that I can ensure proper billing. | | |
| BV: 10  CP: 4 | | |
| Acceptance Criteria:  Invoices generated accurately, PDF exports successful, Invoice details match order data. | | |

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| User story No:33 Notify Overdue Payments | Tasks:  Develop reminder system, Configure templates, Track payment status. | Priority:  Medium |
| Value Statement:  As a Finance Manager, I want to send payment reminders to customers so that I can reduce overdue payments. | | |
| BV: 8  CP: 3 | | |
| Acceptance Criteria:  Reminders sent on time, Payment status updated accurately, Reports show overdue payment metrics. | | |

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| User story No:34 Enable Role-Based Dashboards | Tasks:  Develop role-specific views, Apply access restrictions, Track view usage. | Priority:  High |
| Value Statement:  As an Admin, I want role-based dashboards so that users see only relevant information. | | |
| BV: 9  CP: 3 | | |
| Acceptance Criteria:  Dashboards display correct data based on roles, Unauthorized access restricted, Usage reports generated. | | |

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| User story No:35 Forecast Sales | Tasks:  Develop forecasting model, Integrate historical data, Display projections | Priority:  High |
| Value Statement:  As a Sales Manager, I want to forecast future sales so that I can plan resources. | | |
| BV: 10  CP: 5 | | |
| Acceptance Criteria:  Forecasts generated accurately, Visual reports provided, Users can adjust variables. | | |

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| User story No:36 Manage Integrations | Tasks:  Develop integration management module, provide connection status, Enable notifications for errors. | Priority:  High |
| Value Statement:  As an Admin, I want to manage third-party integrations so that I can expand CRM functionality. | | |
| BV: 8  CP: 4 | | |
| Acceptance Criteria:  Integrations connected successfully, Errors handled, Notifications received. | | |

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| User story No:37 Capture Customer Feedback | Tasks:  Develop feedback form, enable survey management, Generate reports. | Priority:  Medium |
| Value Statement:  As a Marketing Manager, I want to capture customer feedback so that I can measure satisfaction. | | |
| BV: 7  CP: 3 | | |
| Acceptance Criteria:  Feedback submitted successfully, Survey reports generated, Data visualized accurately. | | |

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| User story No:38 Access Mobile App | Tasks:  Develop responsive UI, Implement mobile app features, Sync data in real-time. | Priority:  High |
| Value Statement:  As a Sales Representative, I want to access the CRM from a mobile app so that I can work remotely. | | |
| BV: 10  CP: 5 | | |
| Acceptance Criteria:  Mobile app functions correctly, Real-time data sync works, UI is mobile-optimized. | | |

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| User story No:39 Provide Training Resources | Tasks:  Develop resource section, Upload videos and documents, Enable search functionality. | Priority:  Medium |
| Value Statement:  As an Admin, I want to provide training resources within the CRM so that users can upskill. | | |
| BV: 8  CP: 2 | | |
| Acceptance Criteria:  Resources accessible to users, Videos play without issues, Search results are accurate. | | |

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| User story No:40 Monitor Customer Satisfaction | Tasks:  Develop satisfaction scoring module, Track scores over time, Generate satisfaction reports. | Priority:  High |
| Value Statement:  As a Marketing Analyst, I want to monitor customer satisfaction scores so that I can identify areas for improvement. | | |
| BV: 9  CP: 4 | | |
| Acceptance Criteria:  Scores calculated accurately, Trends visualized, Reports generated within expected time. | | |

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 | 8 | 3 | Sprint 1 |
| 2 | Lead Management | Lead Creation, Assignment, Status Tracking | High | 7 | 2 | Sprint 1 |
| 3 | Sales Pipeline Management | Visual Pipeline, Drag-and-Drop, Filters | High | 9 | 3 | Sprint 2 |
| 4 | Task Management | Task Creation, Assignment, Reminders, Tracking | Medium | 7 | 4 | Sprint 2 |
| 5 | Contact Management | Add Contacts, Import/Export, Bulk Actions | Medium | 10 | 2 | Sprint 3 |
| 6 | Reporting and Analytics | Create Reports, Visualize Data, Export Reports | High | 8 | 3 | Sprint 3 |
| 7 | Customer Support Dashboard | Design dashboard, integrate with issue database, Add filter options | High | 9 | 3 | Sprint 4 |
| 8 | Automate Follow-Up Emails | Configure email templates, Schedule automated emails, Track email status | Medium | 7 | 4 | Sprint 4 |
| 9 | Track Email Interactions | Develop email tracking module, capture open and click data, Display analytics | High | 10 | 4 | Sprint 5 |
| 10 | Customize CRM Dashboard | Implement drag-and-drop widgets, save custom layouts, Provide reset option | High | 9 | 3 | Sprint 5 |
| 11 | Implement Chat Support | Develop chat UI, implement real-time messaging, Enable chat history storage | High | 10 | 4 | Sprint 6 |
| 12 | Manage Service Tickets | Build ticket management system, provide status updates, Generate reports | High | 9 | 3 | Sprint 6 |
| 13 | Analyse Sales Trends | Develop trend analysis module, provide visual graphs, Enable custom time filters | High | 10 | 4 | Sprint 7 |
| 14 | Integrate with Payment Gateway | Connect to gateway API, Implement secure payment processing, Log transactions | High | 10 | 5 | Sprint 7 |
| 15 | Create Audit Logs | Develop logging module, Track user actions, Provide search and filter options | High | 8 | 3 | Sprint 8 |
| 16 | Schedule Campaigns | Implement campaign scheduling, Enable automated launch, Provide status tracking | Medium | 7 | 3 | Sprint 8 |
| 17 | Manage Multiple Currencies | Implement currency converter, Track exchange rates, Display currency-specific reports | High | 9 | 4 | Sprint 9 |
| 18 | Generate Invoices | Develop invoice generation module, integrate with order data, Provide PDF export | High | 10 | 4 | Sprint 9 |
| 19 | Notify Overdue Payments | Develop reminder system, Configure templates, Track payment status | Medium | 8 | 3 | Sprint 10 |
| 20 | Enable Role-Based Dashboards | Develop role-specific views, Apply access restrictions, Track view usage | High | 9 | 3 | Sprint 10 |
| 21 | Forecast Sales | Develop forecasting model, Integrate historical data, Display projections | High | 10 | 5 | Sprint 11 |
| 22 | Manage Integrations | Develop integration management module, provide connection status, Enable notifications for errors | High | 8 | 4 | Sprint 11 |
| 23 | Capture Customer Feedback | Develop feedback form, enable survey management, Generate reports | Medium | 7 | 3 | Sprint 12 |
| 24 | Access Mobile App | Develop responsive UI, Implement mobile app features, Sync data in real-time | High | 10 | 5 | Sprint 12 |
| 25 | Provide Training Resources | Develop resource section, Upload videos and documents, Enable search functionality | Medium | 8 | 2 | Sprint 13 |
| 26 | Monitor Customer Satisfaction | Develop satisfaction scoring module, Track scores over time, Generate satisfaction reports | High | 9 | 4 | Sprint 13 |
| 27 | Generate Custom Reports | Develop custom report builder, allow report filters, Provide export options | High | 10 | 3 | Sprint 14 |
| 28 | Customer Segmentation | Provide Segmentation | High | 8 | 5 | Sprint 14 |
| 29 | Manage API Integrations | Build API management module, Monitor API usage, Provide detailed error logs | Medium | 7 | 3 | Sprint 15 |
| 30 | Generate Expense Reports | Develop expense tracking, provide reporting dashboard, Implement PDF export feature | Medium | 8 | 4 | Sprint 15 |
| 31 | Manage Vendor Details | Develop vendor management module, Track vendor contracts, Provide contact management features | Medium | 8 | 4 | Sprint 16 |
| 32 | Schedule Appointments | Develop appointment scheduling module, send reminders, Integrate with calendars | High | 9 | 3 | Sprint 16 |
| 33 | Generate Contract Documents | Create contract templates, Auto-fill fields, Enable PDF generation | High | 10 | 4 | Sprint 14 |
| 34 | Employee Management | Develop employee profile management, Track roles and responsibilities, Provide reporting options | Medium | 7 | 3 | Sprint 14 |
| 35 | Manage Task Dependencies | Implement task dependency management, provide visual timelines, Send notifications | High | 9 | 4 | Sprint 15 |
| 36 | Role-Based Access Control | Implement RBAC system, Define permission levels, Track access logs | High | 10 | 5 | Sprint 15 |
| 37 | Generate Financial Forecasts | Develop financial forecasting module, provide scenario analysis, Display visual reports | High | 10 | 5 | Sprint 16 |
| 38 | Manage Product Inventory | Develop inventory management system, Track stock levels, Provide alerts for low stock | High | 9 | 4 | Sprint 16 |
| 39 | Enable Multi-Language Support | Implement language selection, Provide translation management, Track user preferences | Medium | 8 | 3 | Sprint 17 |
| 40 | Implement Data Backup | Develop automated backup system, Provide restore options, Track backup logs | High | 10 | 5 | Sprint 17 |

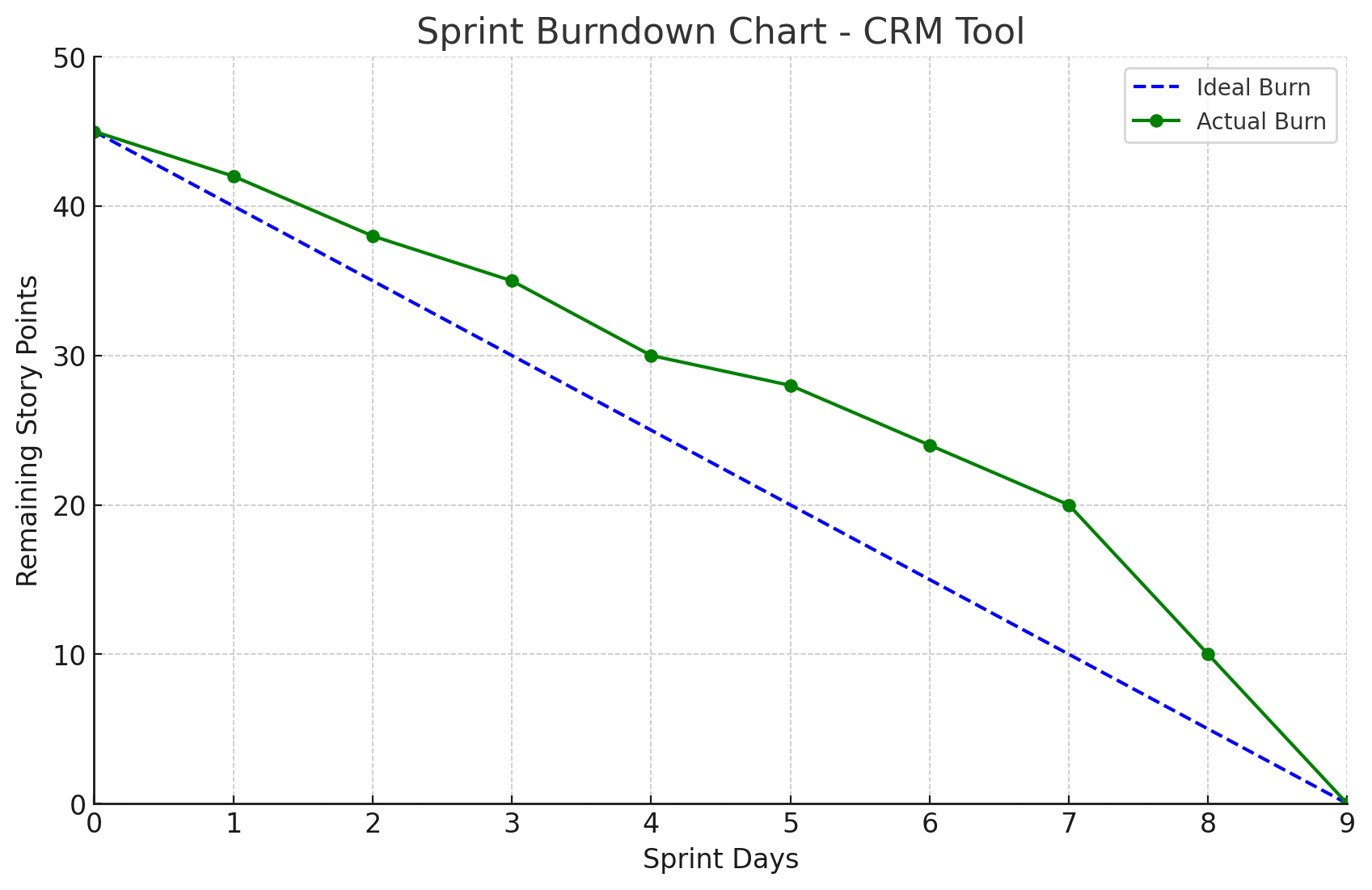
**Sprint backlog:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| User story ID | User Story | Tasks | Owner | status | Estimation Efforts |
| 1 | Customer Management | Develop, Search, Edit, Delete Customer Profiles | Dev Team  1 | 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 Team  3 | 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:

|  |  |  |
| --- | --- | --- |
| 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:

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

Meeting Type 2: Sprint Review Meeting

|  |  |
| --- | --- |
| 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 |

|  |  |  |  |
| --- | --- | --- | --- |
| 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

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Question | Name/Role | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
| What did you do yesterday? | Developer 1 | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | ❌ | ❌ |
|  | Developer 2 | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | ❌ | ❌ |
|  | Developer 3 | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | |  | | --- | | ✅ |  |  | | --- | |  | | ❌ | ❌ |
| 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 |