**Project: HDFC BANK VRM Agile CRM Next Implementation**

# Document 1: Definition of Done

The Definition of Done (DoD) ensures that all work meets the required customer acceptance criteria and quality standards before being considered complete.

**Customer Acceptance Criteria**

* Comprehensive user training sessions have been conducted for bank employees.
* Key banking functionalities such as customer profile, account details, Bank relationship and grouping, Verification & KYC (Know Your Customer), and customer support are operational.
* Automation workflows for lead management, customer interactions, and reporting are configured.
* Role-based access controls are properly assigned and tested.
* All integrations with core banking systems, third-party APIs, and compliance tools are functional.
* Compliance with financial regulations such as GDPR, PCI-DSS, and local banking laws is verified.
* Security protocols and data privacy measures are implemented as per regulatory requirements.
* User acceptance testing (UAT) is successfully completed, with sign-offs from stakeholders.
* Comprehensive user training sessions have been conducted for bank employees.

## Quality standards criteria

* The system operates without downtime during normal banking hours.
* No critical defects remain unresolved before deployment.
* The CRM system performs optimally under expected transaction loads.
* The system is scalable to accommodate future growth.
* The CRM adheres to banking security standards (e.g., encryption, access control).
* Security audits confirm compliance with industry regulations (RBI, GDPR, PCI-DSS).
* The interface is intuitive and easy for bank employees to navigate.
* Customer interaction workflows are seamless and reduce processing time.
* Regular audits confirm the accuracy and integrity of customer data.

# Document 2- Product Vision

A Product Vision Document (PVD) is a top-level strategic document that establishes the reason, objectives, and direction for a product. It is a guiding document for the development team, stakeholders, and business leaders that guarantees everyone is aligned with the goals and desired outcomes of the product. A Product Vision Document maintains focus for teams, makes stakeholders have the same vision, and informs decision-making across the lifecycle of the product. It also drives the product towards business objectives to ensure that it succeeds in the market.

**Vision:** To develop an Agile-driven CRM system that enhances Customer handling, enhance customer management, Insightful and detailed customer interactions, automates processes, provide real-time banking services and resolution and supports strategic decision-making for improved customer satisfaction.

**Target Group:** Bank seeking efficient customer management solutions to track and modify the conventional customer relation on digitalized platform.

**Market Segment:** CRM for Commercial Bank.

**Needs:** Address inefficiencies in managing Customer Relationship, customer handling, tracking, and retention.

**Product:** A scalable, intuitive, and integrative CRM application.

**Feasibility:** Feasible using Agile methodology and current technology stack.

**Value to Company:** Improved customer loyalty, operational efficiency for Employee and Bank, and revenue growth.

**Business Goals:** Deploy CRM in 6 months, Increase Service Efficiency by 40% and reduce customer churn by 30%.

**Business Model:** SaaS CRM with tiered pricing.

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| **Scrum Project Name:** Agile CRM Implementation |
| **Venue:**  |
| **Date:**  | **Start time:**  | **End time:**  | **Duration:**  |
| **Client:**  |
| **Stakeholder list:**  |
| **Scrum Team** |
| **Scrum Master:** Ritika Makwana |
| **Product owner:** Mehul Sonwane |
| **Scrum Developer 1:** Jayesh |
| **Scrum Developer 2:** Nishikant |
| **Scrum Developer 3:** Mukund |
| **Scrum Developer 4:** Jyoti |
| **Scrum Developer 5:** Mehtab |

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| **Vision:** What is your vision, your overarching goal for creating the product?  |
| **Target group** Which market segment does the product address? Who are the target users and customers?  | **Needs** What problem does the product solve? Which benefit does it provide?  | **Product** What product is it? What makes it desirable and special? Is it feasible to develop the product?  | **Value** How is the product going to benefit the company? What are the business goals? What is the business model?  |

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| **Vision:** Is Implement CRM system that enhances Management of customer’s relationship, Real –time Customer services initiation and KYC on Single platform, engagement and operational efficiency and to faster response to customers, data-driven decision making,  |
| **Target group** Service market industry is our target segment Users/Customers: Companies who wants an Agile-based CRM system that enhances customer engagement and operational efficiency  | **Needs** Current CRM lacks agility, user-friendly interface, and scalability Also want to add some featuresQuick iterative releases, improved user adoption, better customer insights | **Product** Is an APP which will be available on company platformAligns with business goals faster response to customers, data-driven decision makingProduct Feasibility can be complex and require attention in every aspect | **Value** Open Up revenue stream and customer satisfactionOptimize data accessibility and usabilityBuild a backlog of prioritized CRM features |

# Document 3- User Stories

 A User Story is a short description of a requirement written from the actor perspective. It tells what the user wants and why. It is an smallest part of epic where as the epic is collection user story from the actor point of view. A user story usually follows this format:

**Who :** As a user…

**What:** I want to…

**Why:** So that

## Acceptance Criteria

Acceptance criteria define the conditions that a software feature must meet to be accepted by stakeholders. In the Given-When-Then format (from Behavior-Driven Development or BDD), acceptance criteria are structured as:

**Given**: Precondition or context (initial state before action)

**When**: Action or event that triggers the functionality

**Then**: Expected outcome or result.

## Business Value (BV) and Complexity Points (CP)

In Agile project management, Business Value (BV) and Complexity Points (CP) are two key factors that help teams prioritize and estimate user stories effectively. BV is given by the client to show how important a feature is, while CP is estimated by the development team using the Fibonacci series to measure complexity. It helps Agile teams make good decisions about what to build first.

## Business Value (BV)

BV represents how important a user story is to the business. It is given by the client or product owner based on how much impact the feature will have on business goals. BV helps prioritize features based on customer needs and market demand. We can measure BV in currency notes (1, 5, 10, 20, 50, 100), we can assign BV to features based on their financial or operational impact.

## Complexity Points (CP)

CP (also called Story Points) represents the effort and difficulty involved in developing a user story. CP helps the team plan their workload and determine how much work they can complete in a sprint.

The development team estimates CP using the Fibonacci series (1, 2, 3, 5, 8, 13, 21, etc.), where:

1, 2 = Very simple tasks

3, 5 = Moderately complex

8, 13, 21+ Very complex with high uncertainty

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| User story No: 1 | Task 1 | Priority : High |
| AS A RM, I WANT TO REGISTER BY PROVIDING MY EMP CREDENTIAL AND PASSWORD, SO THAT I CAN ACCESS THE CRM APPLICATION |
| BV:50 | CP: 08 |
| ACCEPTANCE CRITERIA : USER MUST ENTER EMP CREDENTIAL AND SETUP PASSWORD TO REGISTER |

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| User story No: 2 | Task 2 | Priority : High |
| AS A RM, I WANT TO LOG IN SECURELY, SO THAT I CAN ACCESS MY CRM PORTAL |
| BV:50 | CP: 08 |
| ACCEPTANCE CRITERIA: 1. USER MUST ENTER VALID CREDENTIALS.2. INVALID ATTEMPTS SHOULD SHOW ERROR. 3. ID LOCKS AFTER 3 FAILED ATTEMPTS. 4. SUCCESSFUL LOGIN GRANTS DASHBOARD ACCESS  |

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| User story No: 3 | Task 3 | Priority : Medium |
| AS A RM, I WANT TO RESET MY PASSWORD, SO THAT I CAN REGAIN ACCESS TO MY ACCOUNT.  |
| BV:10 | CP: 03 |
| ACCEPTANCE CRITERIA : USER MUST ENTER HIS EMP CREDENTIAL. 2. OTP OR LINK SENT FOR VERIFICATION. 3. USER RESETS PASSWORD SUCCESSFULLY. |

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| User story No: 4 | Task 4 | Priority : High |
| AS A RMI WANT TO ACCESS CUSTOMERS CONTACT NUMBERSO THAT I CAN CONTACT CUSTOMER |
| BV:20 | CP: 05 |
| ACCEPTANCE CRITERIA : CLICK ON CALL TO THE CUSTOMER |

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| User story No: 5 | Task 5 | Priority : Medium |
| AS A RM I WANT TO LOG OUT SECURELY, SO THAT MY INFORMATION REMAINS PROTECTED |
| BV:5 | CP: 1 |
| ACCEPTANCE CRITERIA : 1. USER CAN LOG OUT. 2. SESSION DATA IS CLEARED. 3. REDIRECT TO LOGIN PAGE. |

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| User story No: 6 | Task 6 | Priority : Medium |
| AS A RM, I WANT TO VIEW MY DASHBOARD, SO THAT I CAN MANAGE MY LEADS AND PROFILE. |
| BV:20 | CP: 05 |
| ACCEPTANCE CRITERIA : 1. DASHBOARD MUST DISPLAY PROFILE. 2. DASHBOARD MUST SHOW ASSIGN LEADS, ASSIGN CUST.  |

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| User story No: 7 | Task 7 | Priority : High |
| AS A RM, I WANT TO SEARCH ASSIGNED CUST PROFILE THORUGH CUST ID OR REG MOBILE NO |
| BV:20 | CP: 03 |
| ACCEPTANCE CRITERIA : 1. IN SEARCH BAR IT SHOULD SHOW CUST ID AND MOBILE NO SPACE TO ENTER. 2. SEARCH RESULT SHOULD ACCURATE.  |

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| User story No: 8 | Task 8 | Priority : HIGH |
| AS A RM, I WANT TO SEE CUST ACCOUNT OVERVIEW  |
| BV: 50 | CP: 5 |
| ACCEPTANCE CRITERIA : RM SHOULD ENTER CUST ID TO FETCH CUST PROFILE  |

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| User story No: 9 | Task 9 | Priority : HIGH |
| AS A RM, I WANT TO CHECK PORTFOLIO DETAILS |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA : USER SHOULD ABLE TO CHECK ASSIGNED PORFOLIO FROM DATABASEDATABASE HAS TO ASSIGN PORTFOLIO  |

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| User story No: 10 | Task 10 | Priority : MEDIUM |
| AS A RM, I WANT ABLE TO SEE ALL MAPPED CUST  |
| BV: 50 | CP: 8 |
| ACCEPTANCE CRITERIA :  USER SHOULD ABLE TO CHECK IF CUST’S ARE ASSIGNED IS SHOWN IN VIEW OPTION |

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| User story No: 11 | Task 11 | Priority : HIGH |
| AS A RM, I WANT TO NOTE DOWN THE RECENT INTERACTION WITH CUST |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA : SYSTEM SHOULD PROVIDE INERACTION TAB TO NOTE RECENT INTERACITON  |

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| User story No: 12 | Task 12 | Priority : LOW |
| AS A RM, I CAN ABLE TO CHECK PREVIOUS INTERACTION AND STATUS |
| BV: 10 | CP: 2 |
| ACCEPTANCE CRITERIA :  SYSTEM DATABASE SHOULD PROVIDE PREVIOUS STORED INTERACTION AND STATUS |

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| User story No: 13 | Task 13  | Priority : LOW |
| AS A RM, I WANT TO UPDATE A STATUS OF CUST |
| BV: 10 | CP: 2 |
| ACCEPTANCE CRITERIA : CUSTOMER PROFILE TAB SHOWS CHANGE STATUS OPTIONOPTION PROVIDED BY SYSYTM TO UPDATE |

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| User story No: 14 | Task 14 | Priority : HIGH |
| AS A RM, I AM ABLE TO UPATE LEADS  |
| BV: 20 | CP: 3 |
| ACCEPTANCE CRITERIA : IN CUST PROFILE OPTION SHOULD AVAILABLE TO CHANGE IN LEAD SECTION  |

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| User story No: 15 | Task 15 | Priority : HIGH |
| AS A RM, I AM ABLE TO RAISE SERVICE REQUEST BEHALF OF CUST |
| BV: 50 | CP: 8 |
| ACCEPTANCE CRITERIA :  SERVICE MAJUAL IS PROVIDED IN SERVICE REQUEST TAB |

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| User story No: 16 | Task 16 | Priority : MEDIUM |
| AS A RM, I SHOULD RAISE CUST RELATIONSHIP UPGRADE WITH BANK |
| BV: 20 | CP: 3 |
| ACCEPTANCE CRITERIA :  SYSTEM PROVIDE CUST RELATIONSHIP UPGRADE |

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| User story No: 17 | Task 17 | Priority : HIGH |
| AS A RM, I AM ABLE TO SENT RE-KYC LINK TO CUST |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA :  PROVIDE SYSTEM INTIGRATED KYC LINK FOR CUST CONSENT |

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| User story No: 18 | Task 18 | Priority : LOW |
| AS A RM, I CAN ABLE TO DOWNLOAD MONTHLY REPORT OF PORTFOLIO |
| BV: 10 | CP: 2 |
| ACCEPTANCE CRITERIA : DATABASE PROVIDES MONTHLY REPORT OF MAPPED CUST. |

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| User story No: 19 | Task 19 | Priority : HIGH |
| AS A RM, I CAN TRACK SERVICE REQUEST  |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA :  SYSTEM PROIVDE RAISED SERVICE REQUEST DATA |

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| User story No: 20 | Task 20 | Priority : HIGH |
| AS A RM, I SHOULD BLOCK CARDS FROM THE CUST’S REQUEST INCASE OF MISHAPPENING |
| BV: 20 | CP: 3 |
| ACCEPTANCE CRITERIA :  SYSTEM GENERATE BLOCK ON CARDS OF CUST BASIS ON CUST’S APPROVAL FOR SECURITY  |

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| User story No: 21 | Task 21 | Priority : MEDIUM |
| AS A RM, I AM ABLE TO DO VERIFICATION THORUGH LINK RAISED FROM CRM |
| BV:10 | CP: 2 |
| ACCEPTANCE CRITERIA :  SYSEM WILL GENERATE LINK FOR VERIFICATION |

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| User story No: 22 | Task 22 | Priority : LOW |
| AS A TEAM HEAD I CAN CHECK CRM REQUEST INITIATED FOR APPROVAL |
| BV: 10 | CP: 2 |
| ACCEPTANCE CRITERIA :  SYSTEM ALLOW APPROVAL TAB VISUAL |

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| User story No: 23 | Task 23 | Priority : HIGH |
| AS TEAM HEAD I CAN SEE MY TEAMS DASHBOARD ACCESS |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA :  DASHBOARD MUST SHOW ASSIGNED TEAMS PORFPOLIO  |

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| User story No: 24 | Task 24 | Priority : MEDIUM |
| AS A TEAM HEAD I WANT TO MONITOR PERFORMANCE OF MY TEAM |
| BV: 10 | CP: 3 |
| ACCEPTANCE CRITERIA :  DASHBOARD MUST PROVIDE INSIGHTOF TEAMS STANDING |

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| User story No: 25 | Task 25 | Priority : HIGH |
| AS TEAM HEAD I CAN BIFURCATE TRIGGER TO ALLOT TEAM  |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA :  DATABASE MUST PROVIDE SORTED DATA TO USE |

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| User story No: 26 | Task 26 | Priority : HIGH |
| AS A TEAM HEAD I NEED AN APPROVAL WORKFLOW FOR RAISED SERVICE REQUEST |
| BV: 50 | CP: 8 |
| ACCEPTANCE CRITERIA :  SYSTEM PROVIDE TEAMS RAISED SERVICE REQUEST INSIGHT TO CHECK |

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| User story No: 27 | Task 27 | Priority : HIGH |
| AS A RM, I NEED INSIGHTS OF CUST’S PREFERENCE AND BEHAVIOUR SO I CAN PROVIDE SUITABLE BANKING SOLUTION |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA :  SYSTEM SHOULD SORT DATA ASPER CUST PREFERANCE AND TARGET GROUP  |

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| User story No: 28 | Task 28 | Priority : LOW |
| AS A RM, I CAN GET CAMPIGN LEAD ASPER BANKS AGENDA  |
| BV: 10 | CP: 2 |
| ACCEPTANCE CRITERIA :  SYSTEM SHOULD SHORT DATA OF CAMPAIGN LEADS  |

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| User story No: 29 | Task 29 | Priority : MEDIUM |
| AS A TEAM HEAD I CAN SEE APPROVAL MANUAL OF CUSTOMER RELATIONSHIP UPGRADE  |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA :  SYSTEM ALLOWS TO TAKE ACTION ON RAISED UPGRADE REQUEST |

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| User story No: 30 | Task 30 | Priority : MEDIUM |
| AS A TEAM HEAD I CAN CHECK AND FORWARD SERVICE REQUEST TO SERVICE TEAM |
| BV: 10 | CP: 3 |
| ACCEPTANCE CRITERIA :  SYSTEM ALLOWS HIERARCHIAL ACCESS FOR SERVICE REQUEST MANUAL |

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| User story No: 31 | Task 31 | Priority : HIGH |
| AS A TEAM HEAD I CAN GIVE MY APPROVAL/REJECTION ON KYC LINK RAISED BY TEAM |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA :  SYSTEM ALLOWS TO TRIGGER APPROVAL AFTER KYC LINK INITIATE |

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| User story No: 32 | Task 32 | Priority : HIGH |
| AS A TEAM HEAD I CAN GIVE MY APPROVAL/REJECTION ON ACTIONABLE ON CARD BLOCKAGE |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA :  SYSTEM ALLOWS TO TRIGGER APPROVAL AFTER CARD BLOCK RAISED  |

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| User story No: 33 | Task 33 | Priority : HIGH  |
| AS A SERVICE TEAM, ARE ABLE SERVICE MANUAL AND RESOLUTION INTIGRATION FOR PROVIDE QUICK RESOLUTION OF QUERIES |
| BV: 50 | CP: 8 |
| ACCEPTANCE CRITERIA :  DATABASE STORED ALL SERVICE QUERIES AND RESOLUTION DESCRIPTION  |

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| User story No: 34 | Task 34 | Priority : HIGH |
| AS A SERVICE TEAM WE NEED AUTOMATED TICKED ID PRIORITISATION AS PER SERVICE TICKET RAISE TO HANDLE SEVIURITY AND CRITICAL QUERIES ON PRORITY |
| BV: 50 | CP: 8 |
| ACCEPTANCE CRITERIA :  SYSTEM SHOULD ALLOW TO PRIORITISE REQUEST AS PER IMPACT |

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| User story No: 35 | Task 35 | Priority : LOW |
| AS A MIS TEAM WE WANT TO SEGREGGATE LEADS TO CREATE CAMPAIGN LEADS AS PER CUST DATA TO TARGET DIFFERENT SET OF CUST |
| BV: 10 | CP: 3 |
| ACCEPTANCE CRITERIA :  DATABASE PROVIDES INSIGHT OF CUST’S PROFILE AND CAMPAIGN DETAILS |

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| User story No: 36 | Task 36 | Priority : MEDIUM |
| AS A OPS TEAM I WANT AUTOMATED DOCUMENT PROCESSING WITHIN CRM TO REDUCE PAPERWORK AND ERROR |
| BV: 20 | CP: 3 |
| ACCEPTANCE CRITERIA :  SYSTEM ALLOWS DIGITALISE PROCESS FOR ONLINE SERVICES |

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| User story No: 37 | Task 37 | Priority : HIGH |
| AS A IT SECURITY OFFICER IWANT TO TWO FACTOR AUTHANTICATION FOR CRM ACCESS TO ENHANCE CUST DATA SECURITY |
| BV: 20 | CP: 5 |
| ACCEPTANCE CRITERIA :  SYSTEM WILL PROVIDE 2 FACTOR AUTHANTICATION |

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| --- | --- | --- |
| User story No: 38 | Task 38 | Priority : LOW |
| AS A IT SECURITY OFFICER WILL PROVIDE VARIOUS ACCESS AS PER DESIGNATION AND ROLE |
| BV: 10 | CP: 2 |
| ACCEPTANCE CRITERIA :  SYSTEM WILL PROVIDE ACEESS TO APPLICATION AS PER ROLES |

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| User story No: 39 | Task 39 | Priority : LOW |
| AS A DATA ANALYST I WANT INSIGHT OF ANALYTICS OF CUSTOMERS BEHAVIOUR TO CREATE TRIGGER, AND LEAD AS PER DETAILS. |
| BV: 10 | CP: 3 |
| ACCEPTANCE CRITERIA : DATABAE ALLOWS DATA SEGGREGATION FOR INITITATING LEADS |

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| User story No: 40 | Task 40 | Priority : HIGH |
| AS A COMPLIANCE OFFICER NEED DASHBOARD TO TRACK ADHERENCE TO BANKING REGULATION FOR ADDRESSING COMPLIANCE ISSUES PROACTIVELY |
| BV: 50 | CP: 8 |
| ACCEPTANCE CRITERIA :  SYSTEM ALLOWS TO TRACK PROCESS AND CHECK IF ITS FOLLOW THE GUIDELINES |

# Document 4: Agile PO Experience

As a Product Owner in an Agile setup, my experience has revolved around product development alignment with market requirements, stakeholder needs, and business objectives. My work started with market analysis, where I evaluated demand, determined competing products, and carried out due diligence to investigate market opportunities. This research guided the product vision and roadmap, creating a well-planned approach with high-level features and an execution timeline. Product feature management was paramount, including intensive interaction with stakeholders to rank needs on criticality and return on investment (ROI) basis. I actively managed the product backlog, ranking user stories and epics and realigning priorities on the basis of changing requirements. During iterations, I tracked sprint progress, took part in sprint retrospectives with Business Analysts, and implemented adjustments in epics and sprints as needed.

I learned much from this experience about leading critical Agile ceremonies like **sprint planning, daily scrum meetings, sprint reviews, sprint retrospectives, and backlog refinement sessions**. I also became an expert in writing user stories to include critical components like story numbers, tasks, priorities, acceptance criteria, and BV & CP values. As the key interface between business stakeholders and the Scrum team, I facilitated effective communication and coordination in all aspects of the organization. Establishing product features and developing them into actionable backlog items enabled the Scrum team to deliver high-value increments effectively. This position improved my capacity to effectively manage Agile projects, promoting flexibility, openness, and ongoing improvement in product development.

# Document 5: Product and Sprint Backlog & Burndown Charts

Product Backlog Sample:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **ID** | **User Story** | **Tasks** | **Priority** | **BV (Business Value)** | **CP (Complexity Points)** | **Sprint** |
| US001 | As a RM, I want to register an account so that I can access the platform. | - Design registration form | High | 50 | 8 | Sprint 1 |
| - Implement backend API |
| - Validate user inputs |
| - Test registration flow |
| US002 | As a RM, I want to log in securely so that I can access my account. | - Create login page UI | High | 50 | 8 | Sprint 1 |
| - Implement authentication |
| - Set up session management |
| - Test login functionality |

Sprint Backlog Sample:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **User Story ID**  | **User Story** | **Tasks**  | **Owner** | **Status** | Estimated effort |
| US01 | Build Log UI | Logging, Syncing | Tarun | In Progress | 8 Hours |

## Product burndown

A Product Burndown Chart is a graphical representation of work completed versus work remaining in a product backlog over time. It helps Agile teams track progress toward completing the product by visualizing how much work is left.



## Sprint Burndown chart

A Sprint Burndown Chart is a visual representation of the remaining work in a sprint over time. It helps Agile teams track progress and assess whether they are on track to complete their sprint goals.



# Document 6: Sprint meetings

## Meeting Type 1: Sprint Planning meeting

A Sprint Planning Meeting is a key event in Scrum where the Scrum Team collaborates to define the work to be completed in the upcoming sprint. It happens at the beginning of each sprint and ensures alignment between the Product Owner, Scrum Master, and Development Team.

This meeting mainly revolve around What can be delivered in this sprint? And How will the work be done?

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| **Date**  | 15-01-22 |
| **Time**  | 11.00 IST |
| **Location**  | Online MS-Teams meeting |
| **Prepared By**  | Scrum Master |
| **Attendees**  | Product Owner, Developers, Testers, Designers, etc. |

## Agenda Topics

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| --- | --- | --- |
| **Topic** | **Presenter** | **Time Allotted** |
| **Welcome & Objective Setting** | Scrum Master | 5 mins |
| **Review of Product Backlog** | Product Owner | 10 mins |
| **Define Sprint Goal** | Scrum Team | 10 mins |
| **Select User Stories for Sprint** | Development Team & PO | 15 mins |
| **Break Down User Stories into Tasks** | Development Team | 20 mins |
| **Effort Estimation (Story Points/Hours)** | Development Team | 15 mins |
| **Identify Dependencies & Risks** | Scrum Team | 10 mins |
| **Confirm Sprint Commitment** | Development Team | 10 mins |
| **Q&A and Final Adjustments** | Scrum Master & PO | 10 mins |
| **Wrap-up & Next Steps** | Scrum Master | 5 mins |

## Other Information

|  |  |
| --- | --- |
| **Category** | **Details** |
| **Observers** | Stakeholders, Business Analysts (if required) |
| **Resources** | JIRA Board, Product Backlog, Sprint Backlog, Estimation Tools, Agile Board |
| **X Special Notes** | Ensure team availability for the sprint duration, Address any blockers before sprint start, Align sprint goal with business objectives |

## Meeting Type 2: Sprint review meeting

A Sprint Review Meeting is held at the end of each sprint to inspect the increment (completed work) and gather feedback from stakeholders. The goal is to ensure the product aligns with business needs and make any necessary adjustments.

### Objectives of a Sprint Review Meeting:

* Demonstrate the completed work (working software).
* Gather feedback from stakeholders.
* Discuss any changes needed in the backlog.
* Celebrate achievements and ensure continuous improvement.

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| **Field** | **Details** |
| **Date** | 22-01-22 |
| **Time** | 11.00 IST |
| **Location** | Online MS Teams meeting |
| **Prepared By** | Scrum Master |
| **Attendees** | Scrum Master, Product Owner, Development Team, Stakeholders |

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| --- | --- | --- | --- |
| **Sprint Status** | **Things to Demo** | **Quick Updates** | **What’s Next** |
| Sprint **5** completed successfully /sprint 6 In progress / 150 Blockers identified | **Features completed**: Cust profile search through cust id, Leads and follow up check | **Key Achievements**: Successful integrations of API, resolved critical issues, new functionalities incorporate successfully | **Upcoming Sprint Goals**: [Next features to develop, e.g., enhancing self-service portal, adding biometric verification] |
| **Live Demonstration**:Screens for crm cust 360 degree profile view | **Challenges Faced**: API issues, dependencies of UI,UX changes | **Backlog Adjustments**: Reprioritized user stories, new additions based on feedback |
| **Test cases passed**:500 TC pass, 100 failed and block | **Stakeholder Feedback**: Suggestions on performance, improvements requested | **Action Items**: Updated the RACI matrix, deadline updated. |

## Meeting Type 3: Sprint retrospective meeting

A Sprint Retrospective Meeting is held at the end of each sprint to reflect on what went well, what could be improved, and how the team can enhance its processes in the next sprint. It is a key component of continuous improvement in Agile.

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| **Field** | **Details** |
| **Date** | 29-01-22 |
| **Time** | 11.00 IST |
| **Location** | Online MS-Teams meeting |
| **Prepared By** | Scrum Master |
| **Attendees** | Scrum Master, Development Team, (Optional: Product Owner) |

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| **Agenda** | **What Went Well** | **What Didn’t Go Well** | **Questions** | **Reference** |
| **Sprint Goals Review** | Clear sprint objectives, well-defined user stories | Some user stories had unclear acceptance criteria | How can we improve requirement clarity? | Sprint Backlog |
| **Team Collaboration** | Effective teamwork, good communication | Delays in dependency resolution | How can we resolve dependencies faster? | Team Feedback |
| **Development Process** | Code quality maintained, fewer defects found | Some tasks took longer than estimated | How can we improve estimation accuracy? | Sprint Metrics |
| **Testing & QA** | Automated tests helped, quick bug resolution | Some test cases were missed in early phases | How can we improve test coverage? | Test Reports |
| **Action Items & Next Steps** | Identified areas for improvement, assigned tasks | Need better tracking of retrospective actions | How can we ensure follow-through? | Retrospective Notes |

## Meeting Type 4: Daily Stand-up meeting

The Daily Stand-up Meeting, also known as the Daily Scrum, is a short, time-boxed meeting (usually 15 minutes) where the Scrum Team synchronizes their work and discusses progress toward the Sprint Goal.

**Purpose of the Daily Stand-up**

* Provide a quick status update.
* Identify blockers or dependencies.
* Align team efforts towards sprint completion.

Week “2” (from 15-01-2022 to 29-01-2022)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Question** | **Name/Role** | **Monday** | **Tuesday** | **Wednesday** | **Thursday** | **Friday** |
| **What did you do yesterday?** | **Developer 1** |  Worked on blocker |   |   |   |   |
| **Developer 2** |  Worked on US HDFC-1001 |   |   |   |   |
| **Developer 3** |  Worked on validation development |   |   |   |   |
| **What will you do today?** | **Developer 1** |  Will be working on assigned US development |   |   |   |   |
| **Developer 2** |  Will start working on the blocker issue of US HDFC-1001 |   |   |   |   |
| **Developer 3** |  Will be performing UT on validation development |   |   |   |   |
| **What (if any) is blocking your progress?** | **Developer 1** |  Will prioritize the high prioritize blocker |   |   |   |   |
| **Developer 2** |  Will prioritize the work as per priority  |   |   |   |   |
| **Developer 3** |  Will figure out the resolution of blocker |   |   |   |   |