Agile Documents

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Project: Agile CRM Implementation

# Document 1: Definition of Done

The Definition of Done (DoD) for the CRM system defines when a backlog item is considered complete. This includes the following criteria to ensure delivery quality and alignment with Agile principles:

* • Acceptance criteria satisfied
* • Quality criteria satisfied
* • Code for required functionality produced
* • No build errors
* • Unit tests written and passing
* • Deployed to test environment identical to production
* • Cross-browser/device testing passed
* • UX designer approval
* • QA completed and issues resolved
* • Feature tested against acceptance criteria
* • Product Owner approval
* • Refactoring completed
* • Documentation updated
* • Configuration changes documented
* • Peer code review done

# Document 2: Product Vision

Vision: To develop an Agile-driven CRM system that enhances customer interactions, automates processes, and supports strategic decision-making for improved customer satisfaction.

Target Group: Businesses seeking efficient customer management solutions.

Market Segment: CRM for SMEs and mid-size enterprises.

Needs: Address inefficiencies in 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, and revenue growth.

Business Goals: Deploy CRM in 6 months, reduce customer churn by 20%.

Business Model: SaaS CRM with tiered pricing.

|  |  |  |  |
| --- | --- | --- | --- |
| **Scrum Project Name:** Agile CRM Implementation | | | |
| **Venue:** | | | |
| **Date:** | **Start time:** | **End time:** | **Duration:** |
| **Client:** | | | |
| **Stakeholder list:** | | | |
| **Scrum Team** | | | |
| **Scrum Master:** Rajeshwari Kamath | | | |
| **Product owner:** Tarun Pongallu | | | |
| **Scrum Developer 1:** Shrinivas K | | | |
| **Scrum Developer 2:** Diwakar D | | | |
| **Scrum Developer 3:** Minal Patole | | | |
| **Scrum Developer 4:** Riviera | | | |
| **Scrum Developer 5:** Kiran | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **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? |

|  |  |  |  |
| --- | --- | --- | --- |
| **Vision:** Is Implement an Agile-based CRM system that enhances customer 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  Quick iterative releases, improved user adoption, better customer insights | **Product**  Is an APP which will be available on company platform  Aligns with business goals faster response to customers, data-driven decision making  Product Feasibility can be complex and require attention in every aspect | **Value**  Open Up revenue stream and customer satisfaction  Optimize data accessibility and usability  Build a backlog of prioritized CRM features |

# Document 3: User Stories

|  |  |  |
| --- | --- | --- |
| **User Story No:** 1 | **Tasks:** Create contact logs, email sync, interaction history UI | **Priority:** High |
| **Value Statement:** As a Sales Manager, I want to track customer interactions so that I can manage follow-ups efficiently. | | |
| **BV:** 90 **CP:** 80 | | |
| **Acceptance criteria:**  - Able to add/view/edit interaction logs - Logs linked to customer profiles - Secure and audit-trail enabled | | |

# Document 4: Agile PO Experience

The Product Owner has a vision of the product keeping the domain/industry experience and the market need.

❖ Following are the responsibilities of PO in a project

➢ Market Analysis ▫ Analysis of market need/demand ▫ Availability of similar products in the market

➢ Enterprise Analysis ▫ Due diligence on the market opportunity

➢ Product Vision and Roadmap ▫ Product vision keeping the need analysis in mind ▫ Product roadmap with high-level features and timeline

➢ Managing Product Features ▫ Managing stakeholder expectations and prioritizing needs ▫ Prioritization of the epics, stories, and features based on criticality and ROI involved

➢ Managing Product Backlog ▫ Prioritization of user stories ▫ Reprioritization based on stakeholders' needs ▫ Epics planning

➢ Managing Overall Iteration Progress ▫ Sprint progress review ▫ Reprioritization of sprints and epics if needed ▫ Sprint retrospectives with Business Analyst

❖ From this project I have learned how to handle sprint meetings such as

➢ Sprint planning meeting: a collaborative event in Agile methodologies where the Scrum team (including the Scrum Master, Product Owner, and Development Team) determines the work to be done during the upcoming sprint

➢ Daily scrum meeting: A daily Scrum meeting (also known as a standup meeting) is a short, time-boxed meeting where members of the Scrum team gather to provide updates on what they worked on the previous day, what they plan to do today, and what (if any) impediments or issues they have encountered.

➢ Sprint review meeting: the development team and stakeholders gather to review and demonstrate the work completed during the sprint

➢ Sprint retrospective meeting: a review conducted after a sprint that plays a key role in the Agile methodology

➢ Backlog refinement meeting: like in sprint planning, product owners and development team members discuss each backlogged item, clarify its requirements, and assess its priority and complexity

❖ Also, User stories creation and what things will be included in user stories such as

➢ Story no: typically refers to the number assigned to a user story, which is a short, simple description of a feature from the perspective of the end-user

➢ Tasks: specific, small units of work that are broken down from user stories and are typically assigned to individual team members for completion

➢ Priority: determining the order in which a team will work on tasks, features, or requirements, based on their importance and value to the project and the customer

➢ Acceptance criteria: a set of specific, measurable, achievable, relevant, and time-bound (SMART) conditions that must be met for a user story or feature to be considered complete and ready for release

➢ BV & CP value: BV (Business Value) refers to the tangible benefits an organization gains from implementing a feature or product, while CP (presumably Customer Perspective) emphasizes the value from the customer's viewpoint

❖ In Scrum, a product owner serves as the liaison between multiple areas of an organization. This person communicates with business stakeholders and collaborates closely with Scrum teams to keep all areas of the business informed on a project's development.

❖ The product owner develops a vision of a product's function and operation, which in turn allows this Scrum team member to define product features and break those features into product backlog items.

The Product Owner (PO) leads CRM product direction through vision, backlog prioritization, and stakeholder collaboration. Key responsibilities include:

* • Conduct market and enterprise analysis
* • Define product vision and roadmap
* • Manage stakeholder expectations
* • Prioritize user stories and epics
* • Ensure smooth sprint execution and retrospectives

# Document 5: Product and Sprint Backlog & Burndown Charts

Product Backlog Sample:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Priority** | **BV** | **CP** | **Sprint** |
| US01 | Interaction Tracking | Logging, Syncing | High | 90 | 80 | 1 |
|  |  |  |  |  |  |  |

Sprint Backlog Sample:

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

# Document 6: Sprint Meetings

Meeting Type 1: Sprint Planning meeting

|  |  |
| --- | --- |
| Date |  |
| Time |  |
| Location |  |
| Prepared by |  |
| Attendees |  |

Agenda Topics

|  |  |  |
| --- | --- | --- |
| Topic | Presenter | Time allotted |
|  |  |  |
|  |  |  |

Other Information

|  |  |
| --- | --- |
| Observers |  |
| Resources |  |
| Special Notes |  |

Meeting Type 2: Sprint Planning meeting

|  |  |
| --- | --- |
| Date |  |
| Time |  |
| Location |  |
| Prepared by |  |
| Attendees |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Sprint status | Things to demo | Quick updates | What’s next |
|  |  |  |  |

Meeting Type 3: Sprint Planning meeting

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date | |  | | |  |
| Time | |  | | |  |
| Location | |  | | |  |
| Prepared by | |  | | |  |
| Attendees | |  | | |  |
| Agenda | What went well | | What didn’t go well | Questions | Reference |
|  |  | |  |  |  |

Meeting Type 4: Daily Stand-up meeting

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Question | Name/Role | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
| What did you do yesterday? | Developer 1  Developer 2  Developer 1  3 |  |  |  |  |  |  |  |
| What will you do today? | Developer 1  Developer 2  Developer 1  3 |  |  |  |  |  |  |  |
| What (if any) is blocking your Progress? | Developer 1  Developer 2  Developer 1  3 |  |  |  |  |  |  |  |

Sprint Planning: Defines sprint goals, selects backlog items, estimates effort.

Sprint Review: Demonstrates completed work, collects stakeholder feedback.

Sprint Retrospective: Team reflects on what went well and what can improve.

Daily Stand-up: Team shares progress, plans for the day, and blockers.