**Document 1: Definition of Done**

**DoD (Definition of Done):**

* It outlines the criteria that a user story or any other backlog item must meet to be considered complete and ready for release.
* It establishes a shared understanding of what it means for work to be considered ‘done’ and ensures that all necessary aspects such as quality, testing and documentation are addressed.
* This helps to identify all activities that need to be completed for the user story to meet the customer’s needs.
* It is more technical.
* The mutual fund document is considered "done" when it meets the following criteria, which ensure completeness, accuracy, and alignment with agreed-upon standards:

**Acceptance Criteria**: All functional and non-functional requirements for the mutual fund document are met, including but not limited to product details, compliance information, investor disclosures, and performance metrics.

**Quality Criteria**: The document complies with quality standards, including formatting, clarity, and correctness, ensuring it is usable for the target audience (investors, stakeholders, etc.).

* **Checklist for Definition of Done (DoD):**
* The code for the user story is implemented, reviewed and merged into the main codebase.
* Automated tests are created and passed, ensuring the implemented functionality functions correctly and not introducing regressions.
* The user story is thoroughly tested and validated against the defined acceptance criteria.
* The user interface (UI) or user experience (UX) aspects of the user story are implemented and reviewed.
* The user story is documented, including relevant instructions, guides or release notes.
* The product owner has reviewed and accepted the user story as meeting the expected requirements.
* **Approval & Sign-Off:** Once the mutual fund document meets all the criteria listed in the Definition of Done checklist, appropriate approvals must be secured

**Document 2- Product Vision**

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| **Scrum Project Name: Mutual Fund Document Creation using DocuBuilder App** | | | |
| **Venue:** | | | |
| **Date:** | **Start time:** | **End time:** | **Duration:** |
| **Client:** | | | |
| **Stakeholder list:** | | | |
| Product Owners | | | |
| Compliance Officers | | | |
| Legal Team | | | |
| Marketing Teams | | | |
| Operating Teams | | | |
| UI/UX Designers | | | |
| Development Teams | | | |
| Product Managers | | | |
| Regulatory Bodies | | | |
| **End Customers (Mutual Fund Providers)** | | | |
| **Scrum Team** | | | |
| **Scrum Master:** | John Doe | | |
| **Product Owner:** | Shashank Bansod | | |
| **Scrum Developer 1:** | Tyler Higgs | | |
| **Scrum Developer 2:** | Alexa Briscoe | | |
| **Scrum Developer 3:** | John Nathan | | |
| **Scrum Developer 4:** | Carol Weasley | | |

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| **Vision:** The vision is to transform mutual fund document creation from a cumbersome, error-prone process into an efficient, collaborative, and reliable one, ensuring that each document serves its purpose in providing clarity and transparency for all stakeholders involved. | | | |
| **Target group**  The product addresses the **asset management** and **financial services** sectors, specifically mutual fund providers and investment firms.  The target users are **compliance officers, legal teams, marketing professionals**, and **operations teams** within asset management firms, while the customers are **mutual fund providers** and **financial institutions**. | **Needs**  It solves the problem of time-consuming, error-prone, and manually-intensive mutual fund document creation.  It provides faster, more accurate, and compliant document generation with consistent branding and real-time data integration. | **Product**  It is an **automated document creation tool** designed for generating compliant, branded mutual fund documents  It streamlines the creation process, ensures regulatory compliance, and integrates real-time data to produce accurate, branded documents quickly.  The product is feasible to develop, leveraging existing technologies for document automation, data integration, and compliance standards. | **Value**  The product will increase efficiency, reduce costs, and ensure regulatory compliance, leading to higher productivity and profitability.  The goals are to streamline document creation, expand market share, and improve customer satisfaction through enhanced document accuracy and speed.  The business model is likely subscription-based, with tiered pricing based on the number of users or documents generated. |

**Document 3: User stories**

* User Story is a very small task that can be delivered in a small timeframe.
* It is a simple, informal description of a feature from the perspective of the end user.
* User stories help to prioritize work, guide development and serve as a communication tool between stakeholders.
* The activities that developers need to complete the user story are called Tasks.
* The value statement is the description of the user story.
* **BV – Business Value:**

1. Business Value is how important is this feature (user Story) to the Business.
2. This is not the cost of Development or the complexity of the feature.
3. This is estimated by Scrum Currency Notes.

* **CP – Complexity Points:**

1. CP is also known as Story Points (SP).
2. CP is the effort required by the Scrum Developers to develop this feature (user story) using technology.
3. Efforts include time taken to solve the complexity and write the code.
4. CP is estimated by the Scrum Developers by using Poker cards.

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| User Story No: 1 | Tasks: 4 | | Priority: High |
| AS A USER  I WANT TO CREATE NEW MUTUAL FUND DOCUMENTS USING A TEMPLATE  SO THAT I CAN START WORKING ON A DOCUMENT WITHOUT HAVING BUILT IT FROM SCRATCH THAT WILL SAVE TIME AND ENSURE CONSISTENCY | | | |
| BV: 500 | | CP: 3 | |
| ACCEPTANCE CRITERIA :   Ability to choose from predefined document templates (e.g., fund fact sheets, performance reports).   Pre-population of certain fields based on the selected fund (e.g., fund name, NAV).   Option to edit or update pre-filled fields as necessary. | | | |

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| User Story No: 2 | Tasks: 4 | | Priority: High |
| AS A USER  I WANT TO COLLABORATE WITH TEAM MEMBERS ON A MUTUAL FUND DOCUMENT  SO THAT WE CAN REVIEW AND EDIT IT TOGETHER IN REAL TIME | | | |
| BV: 500 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Real-time collaboration on the document, with changes appearing instantly for all users.   Ability to comment, tag team members, and leave notes for specific sections.   Track changes and see revision history for accountability. | | | |

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| User Story No: 3 | Tasks: 3 | | Priority: High |
| AS A USER  I WANT TO RECEIVE ALERTS WHEN MY DOCUMENTS ARE READY FOR REVIEW OR APPROVAL  SO THAT I CAN TAKE TIMELY ACTION | | | |
| BV: 500 | | CP: 3 | |
| ACCEPTANCE CRITERIA :   Notifications when a document reaches a specific stage (e.g., ready for review, approved).   Option to receive email or in-app notifications based on user preferences.   Alerts when document deadlines are approaching or if there are delays. | | | |

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| User Story No: 4 | Tasks: 2 | | Priority: Medium |
| AS A USER  I WANT TO ADD MULTIMEDIA ELEMENTS (E.G. IMAGES, CHARTS, GRAPHS) TO THE MUTUAL FUND DOCUMENT  SO THAT I CAN PRESENT COMPLEX INFORMATION MORE CLEARLY | | | |
| BV: 200 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Easy drag-and-drop functionality to insert images, charts, or graphs.   Integration with financial data tools to automatically generate visual charts for fund performance.   Support for resizing, repositioning, and editing multimedia elements. | | | |

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| User Story No: 5 | Tasks: 2 | | Priority: Medium |
| AS A USER  I WANT TO TRACK THE APPROVAL STATUS OF MY DOCUMENT  SO THAT I KNOW WHETHER ITS IS READY TO BE FINALISED OR NEEDS MORE REVISIONS | | | |
| BV: 100 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Clear visual indicators of approval status (e.g., "Pending," "Approved," "Rejected").   The ability to see which user or role is responsible for the next approval.   Option to add comments or requests for changes to the document during the approval process. | | | |

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| User Story No: 6 | Tasks: 4 | | Priority: High |
| AS A USER  I WANT TO GENERATE A FINAL VERSION OF THE DOCUMENT IN MULTIPLE FORMATS (E.G. PDF, WORD)  SO THAT I CAN SHARE IT WITH THE STAKEHOLDERS IN PREFERRED FORMAT | | | |
| BV: 500 | | CP: 3 | |
| ACCEPTANCE CRITERIA :   Option to export the document in various formats (e.g., PDF, DOCX, XLS).   Ability to download the final version of the document or share it directly via email or cloud storage.   Preservation of formatting and multimedia elements when exporting. | | | |

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| User Story No: 7 | Tasks: 2 | | Priority: Medium |
| AS A USER  I WANT TO RECEIVE SUMMARY OF CHANGES MADE TO THE DOCUMENT  SO THAT I CAN REVIEW THE EDITS BEFORE FINALISING IT | | | |
| BV: 100 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   "Change Summary" feature that highlights additions, deletions, and edits made to the document.   Option to accept or reject individual changes.   Clear indication of who made each change and when. | | | |

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| User Story No: 8 | Tasks: 3 | | Priority: High |
| AS A USER  I WANT TO BE ABLE TO FLAG IMPORTANT SECTIONS OF A DOCUMENT  SO THAT I CAN RETURN TO THEM QUICKLY FOR REVIEW OR EDITING LATER | | | |
| BV: 200 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Ability to mark specific sections of the document as “Important” or “Needs Review.”   Quick access to flagged sections through a sidebar or search functionality.   Option to add personal notes or reminders for flagged sections. | | | |

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| User Story No: 9 | Tasks: 5 | | Priority: High |
| AS A COMPLIANCE OFFICER  I WANT THAT THE APP TO ENSURE THAT ALL REQUIRED REGULATORY INFORMATION IS INCLUDED IN THE MUTUAL FUND DOCUMENTS  SO THAT WE REMAIN COMPLIANT WITH INDUSTRY REGULATIONS | | | |
| BV: 500 | | CP: 3 | |
| ACCEPTANCE CRITERIA :   The app highlights missing or incomplete regulatory fields.   Generates a checklist of mandatory compliance data for each document.   Auto-updates compliance language in templates based on regulation changes. | | | |

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| User Story No: 10 | Tasks: 4 | | Priority: High |
| AS A SYSTEM ADMIN  I WANT TO SET UP AND MANAGE USER ROLES AND PERMISSIONS  SO THAT I CAN CONTROL ACCESS AND MAINTAIN SECURITY ACORSS PLATFORM | | | |
| BV: 500 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Ability to create, edit, and delete user roles (e.g., Fund Manager, Compliance Officer, Marketing Manager).   Define permissions for each role (view, edit, approve, delete).   Set up granular access controls for document templates and specific fund data. | | | |

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| User Story No: 11 | Tasks: 2 | | Priority: Low |
| AS A MARKETING MANAGER  I WANT TO CUSTOMISE THE MUTUAL FUND DOCUMENT TEMPLATE  SO THAT I CAN REFLECT THE LATEST BRANDING AND PROMOTIONAL MESSAGING | | | |
| BV: 50 | | CP: 1 | |
| ACCEPTANCE CRITERIA :   Option to add or update logos, fonts, and colour schemes.   Easy integration of marketing messages into the document.   Real-time preview of changes to ensure consistency with branding. | | | |

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| User Story No: 12 | Tasks: 2 | | Priority: Medium |
| AS AN OPERATION MANAGER  I WANT THE ABILITY TO AUTOMATICALLY GENERATE AND SEND MUTUAL FUND REPORTS TO THE CLIENTS  SO THAT I CAN STREAMLINE THE COMMUNICATION PROCESS | | | |
| BV: 100 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Generate and export reports in various formats (PDF, Word, etc.).   Ability to schedule automatic report delivery to clients via email.   Option to personalize report content based on client preferences. | | | |

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| User Story No: 13 | Tasks: 2 | | Priority: Medium |
| AS A DATA ANALYST  I WANT TO EASILY INCORPORATE PERFORMANCE DATA INTO THE DOCUMENTS  SO THAT THE GENERATED REPORTS ARE ACCURATE AND UP TO DATE | | | |
| BV: 100 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Real-time integration with financial data sources (e.g., fund performance, NAV).   Automatic updating of financial figures in the document.   Option to manually override data if needed. | | | |

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| User Story No: 14 | Tasks: 3 | | Priority: High |
| AS A LEGAL TEAM MEMBER  I WANT TO ENSURE THAT THE MUTUAL FUND DOCUMENTS ARE LEGALLY VETTED BEFORE THEY ARE FINALISED  SO THAT WE CAN MITIGATE THE LEGAL RISKS | | | |
| BV: 200 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Built-in legal review checklist before final document generation.   Option to track revisions and comments from the legal team.   A final approval workflow for legal sign-off. | | | |

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| User Story No: 15 | Tasks: 2 | | Priority: Medium |
| AS A DOCUMENT ADMINISTRATOR  I WANT TO MANAGE DOCUMENT VERSIONS  SO THAT I CAN TRACK AND MAINTAIN HISTORY OF ALL VERSIONS | | | |
| BV: 100 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Version control features to track document changes.   Option to revert to a previous version if needed.   Log of all edits, with user and timestamp information. | | | |

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| User Story No: 16 | Tasks: 1 | | Priority: Low |
| AS A CLIENT SERVICE REPRESENTATIVE  I WANT TO QUICKLY SEARCH FOR AND RETRIEVE PREVIOUSLY GENERATED MUTUAL FUND DOCUMENTS  SO THAT I CAN RESPOND TO CLIENT ENQUIRIES EFFICIENTLY | | | |
| BV: 50 | | CP: 1 | |
| ACCEPTANCE CRITERIA :   Advanced search functionality (by fund name, date, document type).   Quick retrieval and access to any previous document version.   Option to filter by client, fund, or document status. | | | |

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| User Story No: 17 | Tasks: 2 | | Priority: Medium |
| AS A FUND ACCOUNTANT  I WANT TO EASILY INPUT OR UPDATE FINANCIAL DATA INTO THE MUTUAL FUND DOCUMENTS  SO THAT THE DOCUMENTS REFELCT THE MOST RECENT FINANCIAL INFORMATION | | | |
| BV: 100 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Ability to input financial data manually or import from spreadsheets.   Auto-calculation of key metrics (e.g., NAV, returns) when data is updated.   Validation checks to ensure financial figures are accurate and formatted correctly. | | | |

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| User Story No: 18 | Tasks: 3 | | Priority: High |
| AS A USER  I WANT TO APP TO SUPPORT MUTLI USER COLLABORATION  SO THAT THE TEAM CAN WORK TOGETHER ON DOCUMENT CREATION AND REVIEW | | | |
| BV: 200 | | CP: 2 | |
| ACCEPTANCE CRITERIA :   Role-based access control for team members.   Real-time collaboration features for drafting and reviewing documents.   Commenting and feedback capabilities within the document for team discussions. | | | |

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| User Story No: 19 | Tasks: 2 | | Priority: Medium |
| AS A USER  I WANT TO TRACK THE DOCUMENT’S LIFECYCLE  SO THAT I KNOW WHEN IT WAS CREATED, MODIFIED, APPROVED AND FINALISED | | | |
| BV: 200 | | CP: 1 | |
| ACCEPTANCE CRITERIA :   A document timeline or activity log showing key events (e.g., creation, edits, approvals).   Date stamps and user names for all events in the document's lifecycle.   Option to export the document’s lifecycle history for record-keeping or compliance. | | | |

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| User Story No: 20 | Tasks: 3 | | Priority: High |
| AS A SYSTEM ADMIN  I WANT TO MONITOR SYSTEM PERFORMANCE AND USAGE  SO THAT I CAN IDENTFY AND OPTIMISE APP FUNCTIONALITY | | | |
| BV: 500 | | CP: 3 | |
| ACCEPTANCE CRITERIA :   Access to system performance analytics, including response times and server uptime.   Track user activity and document creation trends to identify bottlenecks.   Set up automated alerts for system downtime or performance degradation. | | | |

**Document 4: Agile PO Experience**

* The **Product Owner (PO)** has a clear idea of what the product should be, based on their experience in the industry and the needs of the market.
* Below are the key responsibilities of the PO in a project:

1. **Market Analysis**

* Evaluate market demand and trends.
* Assess the availability of similar products in the market to identify competitive advantages.

1. **Enterprise Analysis**

* Investigating if the product has a good chance of success in the market.

1. **Product Vision and Roadmap**

* Define the product vision based on market analysis and user needs.
* Develop a product roadmap, outlining key features and timelines for delivery.

1. **Managing Product Features**

* Align stakeholder expectations with product needs.
* Prioritize epics, user stories, and features based on their impact and ROI.

1. **Managing Product Backlog**

* Organize and prioritize user stories within the backlog.
* Continuously reprioritize based on changing stakeholder needs and project requirements.
* Plan and manage epics for future releases.

1. **Managing Overall Iteration Progress**

* Review sprint progress to ensure alignment with goals.
* Reassess sprint priorities and epics as needed to stay on track.
* Lead sprint retrospectives with the Business Analyst to identify improvements.
* Through this project, I have gained valuable experience in managing **Sprint Meetings**, including:
* **Sprint Planning Meetings -** Planning what will be worked on in the upcoming sprint.
* **Daily Scrum Meetings -** Checking in daily with the team to discuss progress and any obstacles.
* **Sprint Review Meetings -** Reviewing the work completed at the end of a sprint.
* **Sprint Retrospective Meetings -** Reflecting on the sprint to see what can be improved.
* **Backlog Refinement Meetings -** Organizing and updating the list of tasks (backlog) to make sure the team is focused on the right priorities.
* Additionally, I have learned how to create **User Stories**, including the following components:
* **Story Number**
* **Tasks to be done**
* **Priority of the task**
* **Acceptance Criteria**
* **Business Value (BV) & Complexity Points (CP)**
* In Scrum, the **Product Owner** acts as the go-between for different parts of the company. They communicate with stakeholders (people who care about the project, like customers or managers) and work closely with the development team to ensure everyone is on the same page.
* The Product Owner has a vision for how the product should work. This helps them define what features the product will have and break these features down into smaller tasks (called backlog items) for the team to work on.

**Document 5: Product and sprint backlog and product and sprint burndown charts**

* **Product backlog:** The **Product Backlog** is a prioritized list of all the features, enhancements, bug fixes, and other work items that are necessary for the product. It is a living document that evolves over time as new requirements emerge, customer feedback is received, and priorities shift.

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| User Story ID | User Story | Tasks | Priority | BV | CP | Sprint |
| US001 | As a user, I want to create a mutual fund document using a template. | 1. Define document template.  2. Integrate with data sources. | High | 500 | 4 | Sprint 1 |
| US002 | As a user, I want to edit and update mutual fund documents. | 1. Build edit functionality.  2. Ensure data integrity. | High | 200 | 3 | Sprint 2 |
| US003 | As a user, I want to generate reports based on updated mutual fund data. | 1. Connect with reporting tools.  2. Integrate data visualizations. | Medium | 100 | 2 | Sprint 3 |
| US004 | As a user, I want to receive real-time notifications about document status. | 1. Implement notification system.  2. Define user preferences. | Low | 50 | 1 | Sprint 3 |

* **Sprint Backlog**: The **Sprint Backlog** contains the detailed tasks that need to be completed during the sprint. It is a subset of the Product Backlog that the development team commits to working on during a single sprint (iteration). It consists of user stories, tasks, and bugs that need to be completed in the current sprint.

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| --- | --- | --- | --- | --- | --- |
| User Story ID | User Story | Tasks | Owner | Status | Estimated Effort |
| US001 | As a user, I want to create a mutual fund document using a template. | 1. Define document template.  2. Integrate with data sources. | John | In Progress | 8 SP |
| US002 | As a user, I want to create a mutual fund document using a template. | 1. Build edit functionality.  2. Ensure data integrity. | Sarah | To Do | 10 SP |
| US003 | As a user, I want to generate reports based on updated mutual fund data. | 1. Connect with reporting tools.  2. Integrate data visualizations. | Emily | To Do | 12 SP |
| US004 | As a user, I want to receive real-time notifications about document status. | 1. Implement notification system.  2. Define user preferences. | Alex | To Do | 6 SP |

* **Sprint Burndown Chart :**
* It tracks the progress of a work within a single sprint.
* It shows the amount of work remaining in the sprint throughout sprint.
* The X-axis represents time (usually in days of the sprint)
* The Y-axis represents the amount of work remaining (usually in story points, hours or tasks)

A graph showing the growth of a stock market

Description automatically generated with medium confidence

* **Product Burndown chart:**
* It tracks the progress of a work over the entire project or product, not just a single sprint.
* It shows how much work remains in the overall product backlog and is often used to track progress toward completing a product release.
* The X-axis represents time (can be sprints or months)
* The Y-axis represents the amount of work remaining in the product backlog (usually in story points)

A graph of a product burndown chart

Description automatically generated

**Document 6: Sprint meetings**

**Meeting Type 1: Sprint Planning meeting**

|  |  |
| --- | --- |
| Date |  |
| Time |  |
| Location |  |
| Prepared By |  |
| Attendees |  |

**Agenda Topics**

|  |  |  |
| --- | --- | --- |
| **Topic** | **Presenter** | **Time Allotted** |
| Review of Product Backlog | Product Owner | 15 minutes |
| Sprint Goals Discussion | Scrum Master | 10 minutes |
| Task Breakdown | Development Team | 20 minutes |
| Prioritization of Tasks | Product Owner | 15 minutes |
| Assigning Responsibilities | Scrum Master | 10 minutes |
| Capacity and Velocity Review | Development Team | 10 minutes |
| Q&A and Final Adjustments | Scrum Master | 10 minutes |

**Other Information**

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| --- | --- |
| Observers | John Doe |
| Resources | Links to documentation, tools, or other resources required for the meeting |
| Special Notes |  Ensure all team members have reviewed the product backlog before the meeting.   Product Owner to highlight any changes in priorities.   Sprint goals must be aligned with business objectives. |

**Meeting Type 2: Sprint review meeting**

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| Date |  |
| Time |  |
| Location |  |
| Prepared By |  |
| Attendees |  |

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| Sprint Status | Things to demo | Quick Update | What’s next |
| Current Sprint Progress - Brief summary of the sprint’s progress, including completed tasks, any blockers, and whether sprint goals are being met. | [Feature/User Story 1]  [Feature/User Story 2]  [Feature/User Story 3] | **Key Accomplishments -** Brief summary of what was accomplished during the sprint  Challenges Encountered - Any blockers, risks, or issues faced during the sprint.  **Team Feedback -** Feedback from the development team regarding processes, tools, or any concerns | Next Sprint Focus - Discuss focus areas for the next sprint, based on the backlog and any new priorities that might have emerged.  Pending Work -  Any work that is carried over to the next sprint due to time constraints.  Product Roadmap Alignment - Ensure that the upcoming work aligns with the overall product roadmap and goals.  Action Items for the Team - Any immediate actions required before the next sprint planning |
| Sprint Goal Achievement - Discuss if the sprint goal was achieved or not, and provide a quick overview of completed and pending user stories |

**Meeting Type 3: Sprint retrospective meeting**

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| Date |  |
| Time |  |
| Location |  |
| Prepared By |  |
| Attendees |  |

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| Agenda | What went well | What didn’t go well | Questions | Reference |
|  | Identify and celebrate successful outcomes, such as efficient collaboration, meeting document creation goals, or completing tasks on time. | Discuss areas for improvement, like technical challenges in integrating DocuBuilder or missed deadlines in document generation. | Address any open questions related to the sprint, such as feedback on the DocuBuilder app or ways to improve mutual fund document creation. | Review important references or documentation that can inform the team about past decisions or guide future work, including  backlog updates. |
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**Meeting Type 4: Daily Stand-up meeting**

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| Question | Name/Role | Week “X” (from dd-mm-yyyy to dd-mm-yyyy) | | | | | | |
| 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 |  |  |  |  |  |  |  |
| Developer 2 |  |  |  |  |  |  |  |
| Developer 3 |  |  |  |  |  |  |  |
| What (if any) is blocking your progress? | Developer 1 |  |  |  |  |  |  |  |
| Developer 2 |  |  |  |  |  |  |  |
| Developer 3 |  |  |  |  |  |  |  |