**Agile Deliverables**

**Document 1: Definition of Done**

Definition of Done is a technique where the team agrees on, and prominently displays, a list of criteria which must be met before a backlog item is considered done. That is the team has to create a well-defined, unambiguous, measurable, agreed-upon, and shared Definition of Done between all team members.

The best form of Definition of Done representation is a checklist of activities that has to demonstrate the agreed value and quality of a user story. So, this checklist should include:  
 1. Acceptance criteria (to satisfy customer requirements for a product)  
 2. Quality criteria (to satisfy quality requirements for a product)  
Definition of Done may be defined for different levels of project work. For example, in Agile/ Scrum framework these levels of work could be user story, sprint, and release.  
**Checklist for DOD:**  
 Produced code for presumed functionalities  
 Assumptions of User Story met  
 Project builds without errors  
 Unit tests written and passing  
 Project deployed on the test environment identical to production platform  
 Tests on devices/browsers listed in the project assumptions passed  
 Feature ok-ed by UX designer  
 QA performed & issues resolved  
 Feature is tested against acceptance criteria  
 Feature ok-ed by Product Owner  
 Refactoring completed  
 Any configuration or build changes documented  
 Documentation updated  
 Peer Code Review performed

**Using the DOD:**

* The development team uses the DOD as a checklist during development to ensure all criteria are met.
* The PO uses the DOD during sprint reviews to verify that user stories are truly "done."
* The Scrum Master helps the team adhere to the DOD.

**Benefits of a Clear DOD:**

* **Improved Quality:** Reduces defects and ensures consistent quality.
* **Increased Transparency:** Provides a shared understanding of "done" for the entire team.
* **Better Predictability:** Improves sprint planning and predictability.
* **Enhanced Collaboration:** Facilitates better communication and collaboration between team members and stakeholders.
* **Increased Confidence:** Gives the team and stakeholders confidence in the delivered work.

**General DOD Criteria (Applicable to all User Stories):**

* **Functionality Implemented:** All acceptance criteria for the user story are met and verified.
* **Code Quality:** Code follows established coding standards and best practices. Code reviews have been conducted.
* **Testing:**
  + Unit tests have been written and passed for all new code.
  + Integration tests have been written and passed to ensure interactions between components work correctly.
  + System tests have been executed to validate end-to-end functionality.
  + Regression tests have been run to ensure no existing functionality is broken.
  + Performance testing has been conducted (if applicable).
  + Security testing has been conducted (if applicable).
* **Documentation:**
  + Code is well-documented.
  + API documentation is up-to-date.
  + User documentation updated.
* **Deployment:** The feature/user story can be deployed to a staging environment.
* **Peer Review:** Code and functionality have been reviewed by at least one other team member.
* **Stakeholder Sign-off:** The Product Owner (PO) and relevant stakeholders have reviewed and accepted the completed work.
* **DOD Alignment:** The work meets all relevant aspects of the overall project's Definition of Done.

**Feature-Specific DOD Considerations:**

* **Interaction Tracking:**
  + Interaction data is accurately captured from all specified sources (email, calls, meetings, social media).
  + Data is displayed correctly in the CRM, with appropriate formatting and filtering options.
  + Performance is optimized for retrieving and displaying large volumes of interaction data.
* **Campaign Management:**
  + Campaign workflows can be easily created and configured by authorized users.
  + Automated notifications are triggered correctly based on defined rules.
  + Campaign performance can be tracked and reported.
* **Activity Tracking:**
  + All specified sales activities are automatically logged in the CRM.
  + Activity data is accurate and reliable.
  + Reports can be generated to analyze sales activity data.
* **Workflow and Approvals:**
  + Approval workflows function as designed, with correct routing and notifications.
  + Users can easily track the status of pending approvals.
  + Audit trails are maintained for all approvals.
* **Customer Service Automation:**
  + Automated case assignment works correctly based on defined criteria.
  + The automated response system provides accurate and helpful information to customers.
  + Customer feedback is collected and analyzed.

**Document 2- Product Vision**

**Target Group:**

**Which market segment does the product address?**

\* Small to medium-sized businesses (SMBs) in the B2B technology industry with 20-100 employees and dedicated sales teams.

\* Specifically targeting sales representatives, sales managers, and sales team leads within these organizations.

**Who are the target users and customers?**

\*Users: Field Sales Representatives, Inside Sales Representatives, Regional Sales Managers, National Sales Managers, Key Account Managers, Sales Operations Personnel, Sales Analysts, CRM Administrators.

\* Customers:The Pharmaceutical Company, hospitals, clinics, physician practices if their interactions with the CRM influence purchasing decisions at their organizations.

**Needs:**

**What problem does the product solve?**

\* **Fragmented Customer Data**: Sales reps struggle to get a complete view of customer interactions across all channels, leading to missed opportunities and inconsistent messaging.

\* **Inefficient Sales Processes**: Manual data entry, repetitive tasks, and slow approval processes hinder sales team productivity and slow down the sales cycle.

\* **Lack of Team Collaboration**: Sales teams struggle to share information and coordinate their efforts effectively, leading to duplicated work and missed opportunities.

\* **Limited Visibility into Performance**: Sales managers lack real-time insights into team activity and individual performance, making it difficult to provide coaching and identify areas for improvement.

\* **Ineffective Marketing Campaigns**: Marketing campaigns are not targeted effectively, resulting in low conversion rates and wasted resources.

\* **Slow Customer Support**: Customer support processes are slow and inefficient, leading to customer frustration and increased support costs.

**Which benefit does it provide?**

\* **Unified Customer View**: Provides a complete view of customer interactions across all channels, empowering informed and personalized sales conversations.

\***Increased Sales Productivity**: Automates repetitive tasks, freeing up sales reps' time to focus on selling and closing deals.

\* **Improved Team Collaboration**: Facilitates real-time team collaboration on deals and accounts, enhancing communication and coordination.

\* **Data-Driven Decision Making**: Provides real-time insights into sales activity and performance, enabling data-driven coaching and forecasting.

\* **More Effective Marketing**: Enables targeted marketing campaigns, leading to higher conversion rates and improved ROI.

\* **Enhanced Customer Support**: Streamlines customer support processes, ensuring timely issue resolution and improved customer satisfaction.

**Product:**

**What Product it is :**

\*A cloud-based CRM solution that streamlines sales operations by automating repetitive tasks, providing a 360° view of customer interactions, and offering actionable insights through advanced analytics. Key features include:

\* Comprehensive Interaction Tracking across all channels (email, calls, meetings, social media).

\* Automated Campaign Management with personalized messaging.

\* Automated Activity Tracking and reporting.

\* Customizable Workflow and Approval automation.

\* Automated Customer Service processes with feedback collection.

\* Robust reporting and analytics dashboards.

**What makes it desirable and special:**

\* Seamless Integration: Integrates seamlessly with existing sales tools (e.g., Gmail, Outlook, LinkedIn) to minimize manual data entry and provide a unified customer view.

\* Intuitive User Interface: An intuitive and user-friendly interface ensures quick adoption and efficient use by sales teams.

\* AI-Powered Insights: Leverages AI to provide predictive lead scoring and personalized recommendations for customer interactions.

\* Real-time Collaboration:Facilitates real-time team collaboration on deals and customer accounts.

**Is it feasible to develop the product?**

Feasibility is high. The core functionality can be built using existing technologies and our team's expertise. We have allocated budget for development and initial market research confirms sufficient demand. We will conduct a pilot program with a select group of sales representatives to validate user adoption and gather feedback before a full-scale launch.

**Value:**

**How is the product going to benefit the company?**

\* Increased sales revenue through improved conversion rates and shorter sales cycles.

\* Improved sales team productivity by automating administrative tasks and providing better customer insights.

\* Enhanced customer satisfaction through more personalized sales interactions and streamlined customer service.

\* Better sales forecasting due to improved visibility into sales team activities and performance.

\* Reduced operational costs through automation of key processes.

**What are the business goals?**

\* Increase sales revenue by 15% year-over-year within the next two years.

\* Improve lead-to-opportunity conversion rates by 10% within the next 12 months.

\* Reduce the average sales cycle length from 90 days to 60 days within the next year.

\* Increase sales team productivity by increasing qualified leads handled per rep by 15% per quarter.

**What is the business model?**

\* Subscription-based CRM software with tiered pricing based on features and user count.

**Document 3: User stories**

**Interaction Tracking User Stories:**

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| User Story No: 1 | Tasks: 03 | Priority: High |
| **AS A SALES REPRESENTATIVE** **I WANT TO VIEW A CUSTOMER’S PAST INTERACTIONS ACROSS ALL CHANNELS** **SO THAT I CAN HAVE INFORMED AND CONTEXTUAL SALES CONVERSATIONS** | | |
| BV: 300 | | CP: 03 |
| ****Acceptance Criteria:**** ✅ Display customer interaction history (calls, emails, meetings, chats, social media) in CRM. ✅ Show timestamps, interaction types, and key conversation details. ✅ Ensure real-time updates for newly logged interactions. | | |

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| User Story No: 2 | Tasks: 02 | Priority: Medium |
| **AS A SALES MANAGER** **I WANT TO TRACK INTERACTIONS OF MY SALES TEAM WITH PROSPECTS** **SO THAT I CAN MONITOR ENGAGEMENT AND PROVIDE COACHING IF NEEDED** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Display a summary of interactions per sales rep. ✅ Allow filtering interactions by sales team member, prospect, or deal stage. ✅ Provide engagement metrics (e.g., response time, interaction frequency). | | |

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| User Story No: 3 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE** **I WANT TO LOG MY CUSTOMER INTERACTIONS AUTOMATICALLY** **SO THAT I DON’T HAVE TO ENTER THEM MANUALLY** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Automatically capture interactions from emails, calls, and calendar events. ✅ Sync data from sales tools like LinkedIn, Outlook, and Gmail. ✅ Provide an option to edit or delete incorrect entries. | | |

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| User Story No: 4 | Tasks: 02 | Priority: Medium |
| **AS A SALES TEAM LEAD** **I WANT TO RECEIVE NOTIFICATIONS FOR KEY CUSTOMER INTERACTIONS** **SO THAT I CAN TAKE ACTION AT CRITICAL MOMENTS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Set up alerts for important customer interactions (e.g., deal discussions, high-value prospects). ✅ Receive notifications via email or CRM dashboard. ✅ Provide an option to set notification preferences. | | |

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| User Story No: 5 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE** **I WANT TO SEE INTERACTION HISTORY WITHIN THE CRM SALES PIPELINE** **SO THAT I CAN UNDERSTAND A LEAD’S ENGAGEMENT BEFORE FOLLOWING UP** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Display interaction history on each lead/opportunity record. ✅ Allow filtering by interaction type (e.g., meetings, calls, emails). ✅ Integrate with CRM sales pipeline to show engagement levels. | | |

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| User Story No: 6 | Tasks: 02 | Priority: Medium |
| **AS A SALES MANAGER** **I WANT TO ANALYZE INTERACTION PATTERNS FOR TOP-PERFORMING SALES REPS** **SO THAT I CAN IDENTIFY SUCCESSFUL ENGAGEMENT STRATEGIES** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Generate reports on interactions by top sales performers. ✅ Identify common engagement strategies that lead to conversions. ✅ Provide insights into best practices for the sales team. | | |

1. **Campaign Management user stories :**

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| User Story No: 1 | Tasks: 02 | Priority: High |
| **AS A SALES MANAGER** **I WANT TO CREATE AUTOMATED CAMPAIGN WORKFLOWS BASED ON CUSTOMER SEGMENTS** **SO THAT I CAN TARGET THE RIGHT AUDIENCE WITH RELEVANT OFFERS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Ability to define dynamic customer segments based on demographics, behavior, and past interactions. ✅ Set up automated workflows for personalized email, SMS, and social media campaigns. ✅ Trigger actions based on customer engagement (e.g., open rate, clicks, responses). | | |

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| User Story No: 2 | Tasks: 02 | Priority: Medium |
| **AS A SALES REPRESENTATIVE** **I WANT TO RECEIVE AUTOMATED NOTIFICATIONS ABOUT HIGHLY ENGAGED CAMPAIGN LEADS** **SO THAT I CAN FOLLOW UP PROMPTLY AND INCREASE CONVERSIONS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Generate real-time notifications when leads show high engagement (e.g., multiple email opens, website visits). ✅ Provide lead scoring based on campaign interactions. ✅ Allow sales reps to prioritize follow-ups within the CRM dashboard. | | |

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| User Story No: 3 | Tasks: 02 | Priority: High |
| **AS A CRM ADMINISTRATOR** **I WANT TO AUTOMATE THE SCHEDULING AND EXECUTION OF MULTI-CHANNEL CAMPAIGNS** **SO THAT CAMPAIGNS RUN EFFICIENTLY WITH MINIMAL MANUAL INTERVENTION** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Enable scheduling of campaigns across email, SMS, and social media. ✅ Provide a visual workflow builder to set up campaign sequences. ✅ Automate drip campaigns based on predefined rules and customer behavior. | | |

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| User Story No: 4 | Tasks: 02 | Priority: Medium |
| **AS A SALES TEAM LEAD** **I WANT TO TRACK THE PERFORMANCE OF MY TEAM’S CAMPAIGN FOLLOW-UPS** **SO THAT I CAN IDENTIFY GAPS AND OPTIMIZE SALES STRATEGIES** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Track campaign-driven leads and their progression through the sales pipeline. ✅ Generate reports on follow-up activities and conversion rates. ✅ Identify trends in customer responses to optimize future campaigns. | | |

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| User Story No: 5 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE** **I WANT TO PERSONALIZE CAMPAIGN MESSAGES BASED ON CUSTOMER INTERACTIONS** **SO THAT I CAN IMPROVE ENGAGEMENT AND RESPONSE RATES** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Dynamically insert customer details into campaign messages (e.g., name, past purchases, preferences). ✅ Use AI-driven recommendations to tailor messaging. ✅ Track and adjust messaging based on customer engagement levels. | | |

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| User Story No: 6 | Tasks: 02 | Priority: Medium |
| **AS A SALES TEAM MEMBER** **I WANT TO INTEGRATE AUTOMATED CAMPAIGNS WITH MY CRM SALES PIPELINE** **SO THAT I CAN DIRECTLY ENGAGE WITH LEADS GENERATED FROM CAMPAIGNS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Automatically sync campaign leads with CRM opportunities. ✅ Assign leads to the appropriate sales team members based on workflow rules. ✅ Track campaign effectiveness by linking lead interactions to closed deals. | | |

1. **Activity tracking User Stories:**

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| User Story No: 1 | Tasks: 02 | Priority: High |
| **AS A SALES MANAGER** **I WANT TO MONITOR ALL SALES ACTIVITIES IN A CENTRALIZED DASHBOARD** **SO THAT I CAN TRACK TEAM PERFORMANCE AND IDENTIFY AREAS FOR IMPROVEMENT** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Sales activities (calls, emails, meetings, demos) are automatically logged in the CRM. ✅ Dashboard displays activity metrics (number of interactions, response times, conversion rates). ✅ Ability to filter and view activity logs for individual sales reps or teams. | | |

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| User Story No: 2 | Tasks: 02 | Priority: Medium |
| **AS A SALES REPRESENTATIVE** **I WANT MY SALES CALLS AND EMAILS TO BE AUTOMATICALLY TRACKED** **SO THAT I CAN REVIEW MY INTERACTIONS WITH CUSTOMERS WITHOUT MANUAL DATA ENTRY** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ System automatically logs emails, calls, and meetings in the CRM. ✅ Sales reps can manually add notes for key customer interactions. ✅ Search and filter options for reviewing past interactions with customers. | | |

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| User Story No: 3 | Tasks: 02 | Priority: High |
| **AS A SALES TEAM LEAD** **I WANT TO ANALYZE SALES ACTIVITY DATA ACROSS MY TEAM** **SO THAT I CAN IDENTIFY TOP PERFORMERS AND COACH UNDERPERFORMING REPS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Generate reports on sales activities per team member. ✅ Compare activity trends over time (daily, weekly, monthly). ✅ Identify correlations between sales activities and conversion rates. | | |

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| User Story No: 4 | Tasks: 02 | Priority: Medium |
| **AS A CRM ADMINISTRATOR** **I WANT TO ENSURE SALES ACTIVITIES ARE LOGGED IN REAL-TIME** **SO THAT THERE IS NO LOSS OF DATA OR DUPLICATE ENTRIES** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Sales activities sync instantly with CRM without manual intervention. ✅ Duplicate detection prevents redundant activity logs. ✅ Activity logs are securely stored and accessible for audits. | | |

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| User Story No: 5 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE** **I WANT TO RECEIVE REMINDERS FOR FOLLOW-UPS BASED ON PAST ACTIVITIES** **SO THAT I CAN ENGAGE CUSTOMERS AT THE RIGHT TIME TO CLOSE MORE DEALS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ System automatically generates follow-up reminders based on customer interactions. ✅ Notifications for upcoming follow-ups appear in the CRM dashboard. ✅ Ability to customize follow-up schedules based on sales rep preferences. | | |

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| User Story No: 6 | Tasks: 02 | Priority: Medium |
| **AS A SALES TEAM MEMBER** **I WANT TO EXPORT SALES ACTIVITY DATA INTO REPORTS** **SO THAT I CAN SHARE PERFORMANCE INSIGHTS WITH STAKEHOLDERS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Ability to export activity tracking data in Excel, CSV, and PDF formats. ✅ Customizable report templates for sales meetings and performance reviews. ✅ Secure access control for report generation based on user roles. | | |

1. **Workflow and Approvals user Stories:**

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| User Story No: 1 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE** **I WANT TO AUTOMATE LEAD APPROVALS BASED ON PREDEFINED CRITERIA** **SO THAT I CAN QUICKLY MOVE QUALIFIED LEADS INTO THE SALES PIPELINE** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Leads are automatically assigned to sales reps based on region, industry, or priority. ✅ System triggers an approval request for high-value leads requiring manager approval. ✅ Notifications sent to managers for pending lead approvals. | | |

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| User Story No: 2 | Tasks: 02 | Priority: Medium |
| **AS A SALES MANAGER** **I WANT TO AUTOMATE DISCOUNT APPROVALS BASED ON SET RULES** **SO THAT I CAN ENSURE PRICING CONSISTENCY AND REDUCE APPROVAL DELAYS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Discount requests below a set threshold auto-approved. ✅ Discounts exceeding the threshold trigger an approval request. ✅ Managers receive instant notifications for pending discount approvals. | | |

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| User Story No: 3 | Tasks: 02 | Priority: High |
| **AS A CRM ADMINISTRATOR** **I WANT TO CONFIGURE CUSTOM APPROVAL WORKFLOWS** **SO THAT I CAN ADAPT THE SYSTEM TO BUSINESS REQUIREMENTS WITHOUT DEPENDING ON IT TEAMS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Users can create and modify approval workflows without coding. ✅ Predefined templates for common sales processes (discounts, deal approvals, contract sign-offs). ✅ Role-based permissions to restrict workflow modifications. | | |

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| User Story No: 4 | Tasks: 02 | Priority: medium |
| **AS A FINANCE TEAM MEMBER** **I WANT AUTOMATED VALIDATION OF SALES CONTRACTS** **SO THAT I CAN REDUCE ERRORS AND SPEED UP THE APPROVAL PROCESS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Sales contracts auto-validated against pre-set compliance rules. ✅ Contracts missing required fields trigger an error and cannot proceed. ✅ Approved contracts are auto-forwarded to the legal team. | | |

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| User Story No: 5 | Tasks: 02 | Priority: High |
| **AS A SALES REPRESENTATIVE** **I WANT TO TRACK THE STATUS OF MY PENDING APPROVAL REQUESTS IN REAL TIME** **SO THAT I CAN FOLLOW UP AND EXPEDITE CLOSURE OF DEALS** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ A dashboard displays the real-time status of approval requests. ✅ Automated reminders for pending approvals beyond a set time frame. ✅ Email and in-app notifications when an approval is completed or rejected. | | |

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| User Story No: 6 | Tasks: 02 | Priority: Medium |
| **AS A SALES MANAGER** **I WANT TO GENERATE REPORTS ON APPROVAL WORKFLOW PERFORMANCE** **SO THAT I CAN IDENTIFY BOTTLENECKS AND IMPROVE EFFICIENCY** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Reports show average approval times per workflow. ✅ System identifies frequent rejection reasons to refine approval criteria. ✅ Performance tracking of team members involved in approvals. | | |

5. **Customer Service Automation user stories:**

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| User Story No: 1 | Tasks: 02 | Priority: High |
| **AS A CUSTOMER SUPPORT AGENT** **I WANT AUTOMATED CASE ASSIGNMENT BASED ON CUSTOMER PRIORITY AND ISSUE TYPE** **SO THAT I CAN ENSURE QUICK AND RELEVANT RESPONSES TO CUSTOMER QUERIES** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Cases are automatically assigned to the most suitable agent based on issue type and urgency. ✅ VIP customers’ issues are escalated to senior agents automatically. ✅ Agents receive instant notifications when a new case is assigned. | | |

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| User Story No: 2 | Tasks: 02 | Priority: High |
| **AS A CUSTOMER** **I WANT AN AUTOMATED RESPONSE SYSTEM FOR COMMON QUERIES** **SO THAT I CAN GET QUICK SOLUTIONS WITHOUT WAITING FOR AN AGENT** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ AI-powered chatbot or knowledge base provides instant answers to FAQs. ✅ Customers can escalate unresolved queries to live agents. ✅ Chatbot learns from previous interactions to improve future responses. | | |

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| User Story No: 3 | Tasks: 02 | Priority: Medium |
| **AS A CUSTOMER SUPPORT MANAGER** **I WANT AUTOMATED FOLLOW-UP REMINDERS FOR PENDING CUSTOMER CASES** **SO THAT I CAN ENSURE TIMELY ISSUE RESOLUTION AND IMPROVE CUSTOMER SATISFACTION** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ System sends automated reminders to agents for unresolved cases nearing SLAs. ✅ Escalation notifications are triggered if a case remains open beyond a set timeframe. ✅ Customers receive progress updates on their case status. | | |

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| User Story No: 4 | Tasks: 02 | Priority: Medium |
| **AS A CUSTOMER SUPPORT AGENT** **I WANT A PRE-BUILT RESPONSE TEMPLATES FEATURE** **SO THAT I CAN QUICKLY RESPOND TO COMMON CUSTOMER ISSUES WITHOUT TYPING MANUALLY** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Agents can select pre-written response templates for different case categories. ✅ Templates can be customized before sending to ensure personalized communication. ✅ System suggests relevant response templates based on customer queries. | | |

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| User Story No: 5 | Tasks: 02 | Priority: High |
| **AS A CUSTOMER SUPPORT MANAGER** **I WANT TO AUTOMATE CUSTOMER FEEDBACK COLLECTION AFTER ISSUE RESOLUTION** **SO THAT I CAN MEASURE CUSTOMER SATISFACTION AND IMPROVE SERVICE QUALITY** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Automated surveys are sent to customers after case closure. ✅ Feedback is categorized and analyzed to identify areas of improvement. ✅ Low satisfaction scores trigger follow-up actions from customer support teams. | | |

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| User Story No: 6 | Tasks: 02 | Priority: Medium |
| **AS A CUSTOMER SUPPORT ANALYST** **I WANT REPORTING AND ANALYTICS ON AUTOMATED CUSTOMER SERVICE PROCESSES** **SO THAT I CAN IDENTIFY TRENDS, BOTTLENECKS, AND IMPROVEMENT OPPORTUNITIES** | | |
| BV: 200 | | CP: 02 |
| ****Acceptance Criteria:**** ✅ Reports display resolution time, response quality, and customer feedback. ✅ System identifies recurring issues to improve knowledge base articles. ✅ Data-driven insights help refine automation rules for better efficiency. | | |

**Document 4: Agile PO Experience**

The Product Owner (PO) has a vision of the product, keeping the domain/industry experience and the market need in mind.

**♦ Responsibilities of the PO in a project:**

* **Market Analysis:**
  + Analysis of market need and demand.
  + Availability of similar products in the market (competitive analysis).
* **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 epics, stories, and features based on criticality and ROI.
* **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 the Business Analyst.

**♦ Key Activities and Considerations (Agile PO Experience):**

**Phase 1: Understanding and Refining the Product Backlog**

* + **Initial Review:** Thorough review of all user stories, understanding the "who," "what," and "why," and ensuring alignment with the product vision and strategy.
  + **Clarification and Collaboration:** Collaboration with stakeholders (sales team, sales managers, CRM administrators, customer support team) to clarify ambiguities in user stories, asking questions like:
    - "What specific interactions are we tracking and why?"
    - "What are the most critical campaign workflows for our business?"
    - "What key metrics are we trying to improve with activity tracking?"
    - "What are the biggest pain points in our current approval processes?"
    - "What are the most common customer support issues we need to automate?"
  + **Acceptance Criteria Refinement:** Ensuring clear, concise, and testable acceptance criteria, adding specific examples and edge cases. Example: "Automatically capture interactions from emails" - Captures emails sent and received in the last 30 days; Excludes automated system emails; Handles email threads correctly.
  + **Prioritization:** Prioritizing user stories based on business value (BV), considering factors like impact on revenue, customer satisfaction, strategic alignment, and feasibility.
  + **Estimation (Collaboration with Dev Team):** Collaborating with the development team to estimate effort using techniques like story points or t-shirt sizing (crucial for real-world Agile planning).
  + **Product Backlog Refinement Meetings:** Facilitating regular meetings with the development team and stakeholders to discuss and clarify user stories, break down large stories, re-estimate, and re-prioritize.

**Phase 2: Sprint Planning and Execution**

* + **Sprint Planning:** Working with the development team to select user stories for the sprint, considering team capacity and the sprint goal. Example sprint focus: Sprint 1 - Interaction Tracking; Sprint 2 - Campaign Management; etc.
  + **Sprint Goal Definition:** Collaborating with the team to define clear and concise sprint goals (e.g., "Enable sales representatives to have a comprehensive view of customer interaction history.").
  + **Daily Stand-ups:** Attending daily stand-up meetings to stay informed, identify impediments, and answer questions.
  + **Sprint Reviews:** Facilitating sprint review meetings to demonstrate completed user stories and gather feedback.
  + **Sprint Retrospectives:** Participating in sprint retrospectives to reflect on the sprint and identify areas for improvement.

**Phase 3: Ongoing Product Backlog Management**

* + **Continuous Refinement:** Continuously refining the product backlog based on feedback, market changes, and learnings.
  + **New User Stories:** Adding new user stories as needed, following the established process.
  + **Roadmap Updates:** Using the product backlog to inform the product roadmap.

**Challenges and Considerations:**

* + Addressing missing information (effort estimates, assignments).
  + Identifying and managing dependencies between user stories.
  + Effective communication and collaboration with stakeholders.
  + Adapting to changing requirements.

**Product Backlog :**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Priority** | **User Story No.** | **Feature** | **Tasks** | **Sprint Allocation** |
| High | 1 | Interaction Tracking | 3 | Sprint 1 |
| High | 3 | Interaction Tracking | 2 | Sprint 1 |
| High | 5 | Interaction Tracking | 2 | Sprint 1 |
| High | 1 | Campaign Management | 2 | Sprint 2 |
| High | 3 | Campaign Management | 2 | Sprint 2 |
| High | 5 | Campaign Management | 2 | Sprint 2 |
| High | 1 | Activity Tracking | 2 | Sprint 3 |
| High | 3 | Activity Tracking | 2 | Sprint 3 |
| High | 5 | Activity Tracking | 2 | Sprint 3 |
| High | 1 | Workflow and Approvals | 2 | Sprint 4 |
| High | 3 | Workflow and Approvals | 2 | Sprint 4 |
| High | 5 | Workflow and Approvals | 2 | Sprint 4 |
| High | 1 | Customer Service Automation | 2 | Sprint 5 |
| High | 2 | Customer Service Automation | 2 | Sprint 5 |
| High | 5 | Customer Service Automation | 2 | Sprint 5 |
| Medium | 2 | Interaction Tracking | 2 | Sprint 1 |
| Medium | 4 | Interaction Tracking | 2 | Sprint 1 |
| Medium | 6 | Interaction Tracking | 2 | Sprint 2 |
| Medium | 2 | Campaign Management | 2 | Sprint 3 |
| Medium | 4 | Campaign Management | 2 | Sprint 4 |
| Medium | 6 | Campaign Management | 2 | Sprint 5 |
| Medium | 2 | Activity Tracking | 2 | Sprint 4 |
| Medium | 4 | Activity Tracking | 2 | Sprint 5 |
| Medium | 6 | Activity Tracking | 2 | Sprint 5 |
| Medium | 2 | Workflow and Approvals | 2 | Sprint 5 |
| Medium | 4 | Workflow and Approvals | 2 | Sprint 5 |
| Medium | 6 | Workflow and Approvals | 2 | Sprint 5 |
| Medium | 3 | Customer Service Automation | 2 | Sprint 5 |
| Medium | 4 | Customer Service Automation | 2 | Sprint 5 |
| Medium | 6 | Customer Service Automation | 2 | Sprint 5 |

**Sprint-1 Backlog**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Priority | User Story No. | Feature | Tasks | Sprint Allocation | Assigned To |
| High | 1 | Interaction Tracking | 3 | Sprint 1 | Dev1 |
| High | 3 | Interaction Tracking | 2 | Sprint 1 | Dev2 |
| High | 5 | Interaction Tracking | 2 | Sprint 1 | Dev3 |
| Medium | 2 | Interaction Tracking | 2 | Sprint 1 | Dev1 |
| Medium | 4 | Interaction Tracking | 2 | Sprint 1 | Dev2 |
| Medium | 6 | Interaction Tracking | 2 | Sprint 1 | Dev3 |

**Sprint-2 Backlog**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Priority | User Story No. | Feature | Tasks | Sprint Allocation | Assigned To |
| High | 1 | Campaign Management |  | Sprint 2 | Dev1 |
| High | 3 | Campaign Management |  | Sprint 2 | Dev2 |
| High | 5 | Campaign Management | 2 | Sprint 2 | Dev3 |
| Medium | 2 | Campaign Management | 2 | Sprint 2 | Dev1 |
| Medium | 4 | Campaign Management | 2 | Sprint 2 | Dev2 |
| Medium | 6 | Campaign Management | 2 | Sprint 2 | Dev3 |

**Sprint-3 Backlog**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Priority | User Story No. | Feature | Tasks | Sprint Allocation | Assigned To |
| High | 1 | Activity Tracking |  | Sprint 3 | Dev1 |
| High | 3 | Activity Tracking |  | Sprint 3 | Dev2 |
| High | 5 | Activity Tracking | 2 | Sprint 3 | Dev3 |
| Medium | 2 | Activity Tracking | 2 | Sprint 3 | Dev1 |
| Medium | 4 | Activity Tracking | 2 | Sprint 3 | Dev2 |
| Medium | 6 | Activity Tracking | 2 | Sprint 3 | Dev3 |

**Sprint-4 backlog**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Priority | User Story No. | Feature | Tasks | Sprint Allocation | Assigned To |
| High | 1 | Workflow and Approvals |  | Sprint 4 | Dev1 |
| High | 3 | Workflow and Approvals |  | Sprint 4 | Dev2 |
| High | 5 | Workflow and Approvals | 2 | Sprint 4 | Dev3 |
| Medium | 2 | Workflow and Approvals | 2 | Sprint 4 | Dev1 |
| Medium | 4 | Workflow and Approvals | 2 | Sprint 4 | Dev2 |
| Medium | 6 | Workflow and Approvals | 2 | Sprint 4 | Dev3 |

**Sprint -5 backlog**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Priority | User Story No. | Feature | Tasks | Sprint Allocation | Assigned To |
| High | 1 | Customer Service Automation |  | Sprint 5 | Dev1 |
| High | 2 | Customer Service Automation |  | Sprint 5 | Dev2 |
| High | 5 | Customer Service Automation | 2 | Sprint 5 | Dev3 |
| Medium | 3 | Customer Service Automation | 2 | Sprint 5 | Dev1 |
| Medium | 4 | Customer Service Automation | 2 | Sprint 5 | Dev2 |
| Medium | 6 | Customer Service Automation | 2 | Sprint 5 | Dev3 |

**Document 6: Sprint meetings**

**Overall Sprint Cycle (for each of the 5 sprints)**

Each sprint will follow a standard Agile cycle, typically lasting 1-4 weeks (let's assume 2 weeks for this example). The meetings below are repeated for each sprint.

**1. Sprint Planning Meeting**

* **Purpose:** To collaboratively plan the sprint, deciding what to deliver and how to achieve it.
* **Attendees:** Product Owner (PO), Scrum Master (SM), Development Team.
* **Activities:**
  + **Sprint Goal Definition:** The PO proposes a sprint goal based on the top priority user stories. The team collaboratively refines and agrees on the goal. (Examples provided in the previous response.)
  + **User Story Selection:** The PO presents the prioritized user stories. The team discusses each story, clarifies acceptance criteria, and asks questions. The team selects the user stories they can realistically complete within the sprint, considering their capacity.
  + **Task Breakdown:** The team breaks down each selected user story into smaller, actionable tasks. This is where the "Tasks" column in your backlog would be further detailed. For example, the user story "AS A SALES REPRESENTATIVE I WANT TO VIEW A CUSTOMER’S PAST INTERACTIONS..." might be broken down into tasks like:
    - "Design database schema for interaction history."
    - "Develop API endpoint to retrieve interaction data."
    - "Implement UI display for interaction history in CRM."
    - "Write unit tests for API and UI components."
  + **Task Estimation:** The team estimates the effort required for each task (ideally using story points or hours, but in this case, we're using task count as a proxy).
  + **Sprint Backlog Creation:** The selected user stories, their associated tasks, and the task estimations form the Sprint Backlog.
* **Outcome:** A clear Sprint Backlog with agreed-upon user stories, tasks, and estimations, and a defined Sprint Goal.

**2. Daily Scrum (Daily Stand-up)**

* **Purpose:** To synchronize the team's work and identify any impediments.
* **Attendees:** Development Team, Scrum Master (PO may attend but typically doesn't actively participate).
* **Activities:**
  + Each team member answers three questions:
    - "What did I do yesterday to help the team meet the sprint goal?"
    - "What will I do today to help the team meet the sprint goal?"
    - "Are there any impediments that are blocking me or the team?"
* **Outcome:** A shared understanding of the team's progress, identification of any impediments, and adjustments to the plan as needed.

**3. Sprint Review Meeting**

* **Purpose:** To demonstrate the work completed during the sprint and gather feedback from stakeholders.
* **Attendees:** PO, Scrum Master, Development Team, Stakeholders (sales team, sales managers, etc.).
* **Activities:**
  + The team demonstrates the working software or features developed during the sprint.
  + Stakeholders provide feedback on the demonstrated functionality.
  + The PO and stakeholders discuss whether the sprint goal was achieved.
* **Outcome:** Feedback from stakeholders, validation of completed work, and a decision on whether any adjustments are needed for the next sprint.

**4. Sprint Retrospective Meeting**

* **Purpose:** To reflect on the sprint and identify areas for improvement in the team's processes.
* **Attendees:** Development Team, Scrum Master (PO may attend).
* **Activities:**
  + The team discusses what went well during the sprint, what could be improved, and what actions they will take to implement those improvements.
* **Outcome:** A list of actionable items to improve the team's performance in future sprints.

**Product Backlog Refinement (Ongoing)**

* **Purpose:** To continuously refine and groom the Product Backlog, ensuring it is up-to-date and contains well-defined user stories.
* **Attendees:** PO, Scrum Master, Development Team.
* **Activities:**
  + Discuss and clarify upcoming user stories.
  + Break down large user stories into smaller, more manageable ones.
  + Estimate or re-estimate user stories.
  + Prioritize or re-prioritize user stories.
* **Outcome:** A refined and prioritized Product Backlog ready for upcoming sprint planning meetings. This is an ongoing activity, not tied to a specific sprint.