**Definition of Done (DoD) Components:**

#### **Purpose**

The **Definition of Done** ensures that all work completed during sprints is of high quality, meets customer expectations, and is ready for release. It represents a shared understanding among team members of what constitutes a completed user story, sprint, or release.

**DoD Checklist for User Stories**

1. **Code Development:**
	* Code for the feature is written and matches the functionality outlined in the user story.
	* Assumptions and acceptance criteria for the user story are met.
2. **Build and Unit Testing:**
	* Project builds without errors.
	* Unit tests are written, executed, and pass successfully.
3. **Environment Deployment:**
	* The feature is deployed to the test environment identical to the production platform.
4. **Cross-Device/Browser Testing:**
	* Tests are conducted on all devices and browsers listed in the project assumptions, and they pass.
5. **User Experience (UX):**
	* Feature is reviewed and approved by the UX designer to ensure it meets design and usability standards.
6. **Quality Assurance (QA):**
	* QA testing is performed, and all identified issues are resolved.
	* Feature is tested against the defined acceptance criteria.
7. **Stakeholder Approval:**
	* Product Owner reviews and approves the feature as meeting business and functional requirements.
8. **Code Quality and Maintenance:**
	* Code refactoring is completed if required.
	* Peer code review is performed, and feedback is incorporated.
9. **Documentation:**
	* Any configuration or build changes are documented.
	* Documentation (e.g., user manuals, technical specifications) is updated and verified.

**DoD Checklist for a Sprint**

1. All user stories committed to the sprint meet their respective DoD.
2. Sprint Review has been conducted, and stakeholder feedback has been recorded.
3. Sprint Retrospective has been completed to identify lessons learned and improvement opportunities.
4. Product Increment is demonstrated and approved by stakeholders.
5. Updated product backlog reflecting the remaining work and any new tasks identified.

**DoD Checklist for a Release**

1. All sprints within the release meet their respective DoD.
2. End-to-end integration testing is completed.
3. Performance and load testing are conducted, and results are acceptable.
4. Security testing is completed to ensure data protection and compliance.
5. All release notes and deployment documentation are prepared.
6. Training materials for users are developed and shared.
7. Stakeholders have signed off on the release.
8. The release is deployed to the production environment and monitored for any issues.

**Document 2- Product Vision:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Scrum Project Name** | **SALES ONE** |  |   |
| **Venue** | APT IT Solutions, Conference Room  |   |   |
| **Date:** January 15, 2025 | **Start time**: 10.00 AM | **End time**: 12.00 PM | **Duration**: 2 H |
| **Client** | New Wealth Company |   |   |
| **Stakeholder list** | Sales Department Head – Michael Carter |   |   |
|  | Marketing Manager – Sophia Allen |   |   |
|  | IT Manager – Nidhi Rastogi |   |   |
|  | Customer Support Lead – Venkatesh Iyer |   |   |
|  | **Scrum Team** |
| **Scrum Master:** | Rachel Green |   |   |
| **Product owner:** | Vinay Joshi |   |   |
| **Scrum Developer 1** | Ravi Mehta |   |   |
| **Scrum Developer 2** | Anita Agarwal |   |   |
| **Scrum Developer 3** | Prasad Jadhav |   |   |
| **Scrum Developer 4** | Deepika Naik |   |   |
| **Scrum Developer 5** | Samruddhi Patil |   |   |

**Vision**

The vision for SALES ONE is to create a powerful, user-friendly CRM solution that empowers New Wealth sales and marketing teams to streamline lead management, improve customer relationships, and drive revenue growth. The system will centralize customer data, enhance communication, and provide actionable insights through advanced analytics, enabling better decision-making and improved sales performance.

**Target Group**

**Market Segment:**

* Small and medium-sized enterprises (SMEs) across retail, manufacturing, and service sectors.

**Target Users:**

* Sales representatives who need tools to manage leads and track opportunities.
* Sales managers who require reporting and pipeline forecasting.
* Marketing teams responsible for running targeted campaigns.

**Needs**

**Problem the Product Solves:**

* Disorganized and siloed customer information.
* Lack of a structured lead management system.
* Inability to track sales performance effectively.
* Limited insights into customer behavior for marketing teams.

**Benefits Provided:**

* Centralized, accessible customer data repository.
* Streamlined workflows for lead tracking and sales management.
* Data-driven decision-making through comprehensive reporting and analytics.
* Increased productivity and improved customer engagement.

**Product**

**What Product is it?**

* SALES ONE is a customizable, cloud-based CRM system designed to simplify lead management, automate sales processes, and provide real-time insights.

**What Makes It Desirable and Special?**

* User-friendly interface for quick adoption.
* Scalable features to grow with the business.
* Advanced analytics and AI-powered insights.
* Seamless integration with existing tools like email platforms and marketing automation systems.

**Is It Feasible to Develop the Product?**

* Yes, the development aligns with New Wealth technical capabilities and budget. The project will follow Agile Scrum methodology to ensure iterative development and continuous feedback from stakeholders.

**Value**

**How is the Product Going to Benefit the Company?**

* Boosts sales team efficiency, increasing revenue potential.
* Enhances customer satisfaction through improved relationship management.
* Improves decision-making with data-driven insights.

**Business Goals:**

1. Achieve a 25% increase in lead-to-sale conversion rates.
2. Reduce customer response time by 30%.
3. Increase sales team productivity by 20%.

**Business Model:**

* Subscription-based SaaS model offering tiered pricing for different feature levels.

**Document 3: User stories**:

|  |  |  |
| --- | --- | --- |
| **USER STORY 1:** | Tasks: 1 | Priority: HIGHEST |
| As an employee, I want a centralized dashboard to view client information and tasks So that I can manage my workload more efficiently. |
| BV: 500 | CP: 03 |
| **ACCEPTANCE CRITERIA**- The dashboard displays a list of all assigned clients with key metrics.- Employees can filter and search client accounts based on predefined parameters.- Pending tasks and deadlines are highlighted on the dashboard.- The dashboard refreshes in real-time with the latest data. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 2:** | Tasks: 1 | Priority: MEDIUM  |
| As an employee, I want to manage my tasks efficiently So that I can ensure timely delivery of services to clients. |
| BV: 200 | CP: 05 |
| **ACCEPTANCE CRITERIA**- Employees can create, update, and delete tasks related to client accounts.- Tasks can be prioritized and assigned deadlines.- Notifications are sent for approaching deadlines and overdue tasks.- A summary view shows completed and pending tasks. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 3:** | Tasks: 2 | Priority: MEDIUM |
| As an employee, I want to securely upload and access client documents So that I can provide accurate advice based on the latest information. |
| BV: 200 | CP: 05 |
| **ACCEPTANCE CRITERIA**- Employees can upload and share documents securely.- Version history is available for all updated documents.- Access to sensitive documents is restricted based on user roles.- Document downloads and access are logged for audit purposes. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 4:** | Tasks: 2 | Priority: HIGHEST |
| **As a user**,I want a customizable dashboard to view sales metrics **So that I can** analyse performance easily. |
| BV: 500 | CP: 02 |
| **ACCEPTANCE CRITERIA*** Dashboards display metrics like revenue, lead conversion, and sales growth.
* Widgets can be added, removed, or customized by the user.
 |

|  |  |  |
| --- | --- | --- |
| **USER STORY 5:** | Tasks: 2 | Priority: MEDIUM |
| As an employee, I want to analyse client portfolio performance So that I can provide actionable recommendations to clients. |
| BV: 200 | CP: 01 |
| **ACCEPTANCE CRITERIA**- Employees can view performance metrics, such as ROI, growth rate, and risk exposure, on an analytics dashboard.- Reports can be filtered by asset class, performance period, or client type.- Data can be exported in PDF or Excel format for sharing with clients or team members.- The dashboard updates in real-time with the latest market data. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 6:** | Tasks: 2 | Priority: HIGHEST |
| As an employee, I want to track all client interactions So that I can maintain continuity and build stronger client relationships. |
| BV: 500 | CP: 05 |
| **ACCEPTANCE CRITERIA**- Employees can log details of each client interaction, including date, type, and outcome.- Follow-up reminders can be set for specific dates and times.- Interaction history is visible on the client profile for reference.- Quick notes are saved and time stamped for future use. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 7:** | Tasks: 1 | Priority: MEDIUM |
| As an employee, I want to send bulk email communications to clients So that I can keep them informed about market updates and portfolio changes. |
| BV: 100 | CP: 03 |
| **ACCEPTANCE CRITERIA**- Employees can select a group of clients based on filters (e.g., portfolio size, region).- Predefined email templates are available for common communications.- The system tracks email open rates and logs client responses.- Sent emails are automatically logged in the client interaction history. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 8:** | Tasks: 3 | Priority: MEDIUM |
| As an employee, I want to manage the client referral program So that I can reward clients and encourage new business growth. |
| BV: 200 | CP: 05 |
| **ACCEPTANCE CRITERIA**- Employees can track referrals made by clients and assign rewards based on predefined criteria.- Clients are automatically notified when they earn rewards.- Referral performance reports are available for employees to review and optimize the program.- Rewards and referrals are integrated with the client’s profile. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 9:** | Tasks: 1 | Priority: MEDIUM |
| **As an employee**, I want to automate the generation of monthly client portfolio reports, **So that I can save time on manual reporting.** |
| BV: 200 | CP: 05 |
| **ACCEPTANCE CRITERIA**- Monthly reports include detailed insights into portfolio performance.- Reports are generated automatically and emailed to clients. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 10:** | Tasks: 2 | Priority: HIGHEST |
| **As an employee**, I want to view consolidated data of all client interactions, **So that I can prepare for meetings effectively.** |
| BV: 500 | CP: 03 |
| **ACCEPTANCE CRITERIA**- Dashboard shows call logs, emails, and meeting notes.- Data is updated in real-time. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 11:** | Tasks: 3 | Priority: MEDIUM |
| **As an employee**, I want to assign priority levels to tasks, **So that I can focus on critical activities** |
| BV: 200 | CP: 02 |
| **ACCEPTANCE CRITERIA**- Tasks can be tagged with priority labels.- High-priority tasks trigger email notifications. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 12:** | Tasks: 3 | Priority: HIGHEST |
| **As an employee**, I want to receive real-time updates on market trends, **So that I can proactively adjust client portfolios.** |
| BV: 500 | CP: 01 |
| **ACCEPTANCE CRITERIA**- Updates are sourced from trusted market APIs.- Notifications are displayed in the CRM dashboard. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 13:** | Tasks: 1 | Priority: MEDIUM |
| **As an employee**,I want to schedule automatic follow-ups for client meetings,**So that I don’t miss important deadlines.** |
| BV: 100 | CP: 03 |
| **ACCEPTANCE CRITERIA**- Follow-ups can be scheduled with reminders.- Notifications are sent to both the employee and client. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 14:** | Tasks: 2 | Priority: HIGHEST |
| **As an admin**, I want to monitor the team's performance metrics, **So that I can identify areas for improvement.** |
| BV: 500 | CP: 03 |
| **ACCEPTANCE CRITERIA**- Performance metrics include task completion rates and client feedback.- Data is displayed on an admin-only dashboard. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 15:** | Tasks: 1 | Priority: MEDIUM |
| **As an admin**, I want to set access controls for sensitive client information, **So that data security is ensured.** |
| BV: 200 | CP: 02 |
| **ACCEPTANCE CRITERIA**- Roles determine access levels to client data.- Audit logs track data access events. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 16:** | Tasks: 2 | Priority: MEDIUM |
| **As an admin**, I want to create team-specific dashboards, **So that each team can focus on relevant metrics.** |
| BV: 200 | CP: 02 |
| **ACCEPTANCE CRITERIA**- Dashboards can be customized per team.- Changes require admin approval. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 17:** | Tasks: 3 | Priority: HIGHEST |
| **As an admin**, I want to generate compliance audit reports, **So that the organization meets regulatory standards.** |
| BV: 500 | CP: 05 |
| **ACCEPTANCE CRITERIA**- Reports include a summary of client interactions.- Data is formatted for regulatory submissions.- Rewards and referrals are integrated with the client’s profile. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 18:** | Tasks: 1 | Priority: MEDIUM |
| **As an admin**,I want to manage system-wide notifications, **So that all users stay informed about updates and outages.** |
| BV: 200 | CP: 01 |
| **ACCEPTANCE CRITERIA**- Notifications can be scheduled or sent immediately.- Messages are visible in the CRM and via email. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 19:** | Tasks: 2 | Priority: MEDIUM |
| **As a client**, I want to access my portfolio performance summary online, **So that I can track my investments anytime.** |
| BV: 100 | CP: 02 |
| **ACCEPTANCE CRITERIA**- Dashboard shows portfolio value, returns, and risk levels.- Data refreshes daily. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 20:** | Tasks: 3 | Priority: MEDIUM |
| **As a client**, I want to request a one-on-one meeting with my advisor, **So that I can get personalized investment guidance.** |
| BV: 200 | CP: 01 |
| **ACCEPTANCE CRITERIA**- Meeting requests are sent directly to advisors.- Clients receive email confirmations. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 21:** | Tasks: 3 | Priority: HIGHEST |
| **As a client**, I want to receive notifications for upcoming payment deadlines, **So that I don’t incur late fees.** |
| BV: 500 | CP: 02 |
| **ACCEPTANCE CRITERIA**- Notifications are sent 7 and 1 day before deadlines.- Payment links are included in notifications. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 22:** | Tasks: 3 | Priority: MEDIUM |
| **As a client**, I want to compare different investment products, **So that I can make informed decisions.** |
| BV: 200 | CP: 02 |
| **ACCEPTANCE CRITERIA**- Comparison tool displays features, risks, and returns side by side.- Clients can save comparisons for later review. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 23:** | Tasks: 2 | Priority: MEDIUM |
| **As a client**, I want to provide feedback on the CRM’s usability, **So that the system can improve over time.** |
| BV: 200 | CP: 03 |
| **ACCEPTANCE CRITERIA**- Feedback forms are available on the client portal.- Clients can rate features and leave comments. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 24:** | Tasks: 2 | Priority: MEDIUM |
| **As a user**, I want to log in using multi-factor authentication, **So that my account is secure.** |
| BV: 100 | CP: 05 |
| **ACCEPTANCE CRITERIA**- The system must prompt users to enter a one-time password (OTP) after entering their username and password.- OTPs must be sent via email or SMS as per user preference. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 25:** | Tasks: 1 | Priority: LOW |
| As a user, I want to download reports in PDF format, So that I can share them easily. |
| BV: 100 | CP: 05 |
| **ACCEPTANCE CRITERIA**- Users must have the option to download reports in PDF format from the report view screen.- PDF downloads must include the full report details as shown on the screen. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 26:** | Tasks: 3 | Priority: MEDIUM |
| As a user, I want the CRM to support multiple languages, So that it’s accessible to a diverse audience. |
| BV: 200 | CP: 01 |
| **ACCEPTANCE CRITERIA**- Users must be able to select their preferred language from a dropdown menu.- The CRM must support at least 5 core languages. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 27:** | Tasks: 2 | Priority: HIGHEST |
| As a user, I want a responsive design for the CRM, So that it works well on mobile devices. |
| BV: 500 | CP: 02 |
| **ACCEPTANCE CRITERIA**- The CRM interface must adapt seamlessly to screen sizes on mobile, tablet, and desktop devices.- Key functionalities like dashboards, reports, and client interactions must remain fully accessible on mobile devices. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 28:** | Tasks: 1 | Priority: LOW |
| As a user, I want a detailed help section with FAQs, So that I can resolve issues independently. |
| BV: 100 | CP: 01 |
| **ACCEPTANCE CRITERIA**- The help section must include a categorized list of FAQs, covering topics like login, report generation, and account settings.- Users must be able to search the help section using keywords. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 29:** | Tasks: 3 | Priority: MEDIUM |
| **As a user**, I want the CRM to integrate with third-party tools like Outlook and Zoom, **So that I can manage communications seamlessly.** |
| BV: 200 | CP: 03 |
| **ACCEPTANCE CRITERIA**- Integration allows scheduling and joining meetings directly from the CRM.- Email sync pulls communication history into the client profile. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 30:** | Tasks: 1 | Priority: MEDIUM |
| **As a user**, I want to track client engagement through heat maps, **So that I can identify high-value interactions.** |
| BV: 200 | CP: 02 |
| **ACCEPTANCE CRITERIA**- Heat maps highlight periods of high and low interaction.- Data is updated in real-time based on communication logs. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 31:** | Tasks: 1 | Priority: LOW |
| **As a user**, I want to add notes to client profiles, **So that I can document key details after each interaction.** |
| BV: 100 | CP: 01 |
| **ACCEPTANCE CRITERIA**- Notes are time stamped and saved securely.- Notes can be categorized by interaction type. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 32:** | Tasks: 3 | Priority: MEDIUM |
| **As a user**, I want to receive notifications when clients achieve portfolio milestones, **So that I can celebrate their successes.** |
| BV: 200 | CP: 05 |
| **ACCEPTANCE CRITERIA**- Notifications include milestone details and suggested next steps.- Triggers are based on predefined thresholds (e.g., portfolio growth of 10%). |

|  |  |  |
| --- | --- | --- |
| **USER STORY 33:** | Tasks: 2 | Priority: LOW |
| **As a user**, I want to set up recurring tasks for client management, **So that I don’t forget regular check-ins.** |
| BV: 100 | CP: 01 |
| **ACCEPTANCE CRITERIA**- Tasks can be scheduled weekly, monthly, or quarterly.- Notifications are sent before the task deadline. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 34:** | Tasks: 3 | Priority: MEDIUM |
| **As an admin**,I want to generate churn prediction reports, **So that I can proactively address client retention risks.** |
| BV: 200 | CP: 03 |
| **ACCEPTANCE CRITERIA**- Reports analyse client behaviour and highlight potential churn risks.- Predictions include suggested actions to retain clients. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 35:** | Tasks: 2 | Priority: MEDIUM |
| **As an admin**, I want to track CRM system usage metrics, **So that I can monitor adoption rates.** |
| BV: 200 | CP: 02 |
| **ACCEPTANCE CRITERIA**- Metrics include login frequency, feature usage, and active users.- Data is displayed in graphical format for quick analysis. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 36:** | Tasks: 1 | Priority: MEDIUM |
| **As a client**, I want to schedule and view my financial goal progress, **So that I can stay motivated.** |
| BV: 200 | CP: 05 |
| **ACCEPTANCE CRITERIA**- Goals include savings, investments, and retirement plans.- Progress is updated automatically based on portfolio performance. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 37:** | Tasks: 3 | Priority: HIGHEST |
| **As a client**, I want access to educational resources about wealth management, **So that I can make informed decisions.** |
| BV: 500 | CP: 03 |
| **ACCEPTANCE CRITERIA**- Resources include videos, articles, and webinars.- Topics are tailored to the client’s portfolio and interests. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 38:** | Tasks: 3 | Priority: MEDIUM |
| **As a client**, I want to track all my interactions with the advisor, **So that I can refer to past discussions.** |
| BV: 200 | CP: 01 |
| **ACCEPTANCE CRITERIA**- Interaction logs include dates, times, and summaries.- Logs are searchable by keywords and filters. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 39:** | Tasks: 1 | Priority: MEDIUM |
| **As an admin**, I want to create and assign training modules for employees, **So that the team stays updated on new features.** |
| BV: 200 | CP: 01 |
| **ACCEPTANCE CRITERIA**- Modules include videos, quizzes, and certification options.- Progress is tracked and visible in employee profiles. |

|  |  |  |
| --- | --- | --- |
| **USER STORY 40:** | Tasks: 2 | Priority: MEDIUM |
| **As a client**, I want to provide referrals easily through the CRM, **So that I can earn rewards for recommending the service.** |
| BV: 200 | CP: 05 |
| **ACCEPTANCE CRITERIA**- Referral links can be generated and shared via email or social media.- Rewards are automatically tracked and redeemed through the client portal. |

### ****Document 4: Agile Product Owner (PO) Experience****

**Role of Product Owner (PO) in the Project**

The Product Owner (PO) plays a pivotal role in the success of a project by bridging the gap between business stakeholders and the development team. The responsibilities of the PO in the **SALES ONE** project for wealth management include:

### ****Responsibilities of the Product Owner****

#### **1. Market Analysis**

* Conducted an in-depth analysis of the wealth management industry to identify unmet market needs and demands.
* Researched the availability of similar CRM products and assessed their features, strengths, and gaps.

#### **2. Enterprise Analysis**

* Performed due diligence on the potential market opportunity for the **SALES ONE** CRM.
* Evaluated how the product can provide a competitive advantage and align with business objectives.

#### **3. Product Vision and Roadmap**

* Developed a product vision centered on addressing client and employee needs within wealth management.
* Created a high-level roadmap outlining key features, target milestones, and delivery timelines.

#### **4. Managing Product Features**

* Engaged stakeholders to capture their expectations and prioritize needs based on business goals.
* Prioritized epics, stories, and features by evaluating their criticality and ROI, ensuring alignment with business objectives.

#### **5. Managing Product Backlog**

* Maintained and refined the product backlog to reflect changing stakeholder priorities.
* Planned and organized epics and user stories to optimize development sprints.
* Reprioritized backlog items based on new insights and sprint reviews.

#### **6. Managing Overall Iteration Progress**

* Reviewed sprint progress regularly to ensure alignment with project goals.
* Conducted sprint retrospectives in collaboration with the Business Analyst to identify improvement areas.
* Reprioritized sprints and epics as needed, based on stakeholder feedback and sprint outcomes.

### ****Sprint Meetings Led by the PO****

The PO actively participated in and led the following key sprint meetings:

1. **Sprint Planning Meeting**
	* Defined sprint goals and prioritized backlog items with the development team.
	* Clarified requirements and ensured the team had a clear understanding of deliverables.
2. **Daily Scrum Meeting**
	* Monitored daily progress and addressed any blockers raised by the development team.
	* Provided clarification on stories and adjusted priorities if necessary.
3. **Sprint Review Meeting**
	* Reviewed completed user stories and gathered feedback from stakeholders.
	* Ensured acceptance criteria for stories were met and approved deliverables.
4. **Sprint Retrospective Meeting**
	* Collaborated with the team to identify areas for improvement.
	* Documented lessons learned and actionable improvements for upcoming sprints.
5. **Backlog Refinement Meeting**
	* Reviewed and updated the backlog to ensure it reflected the latest priorities.
	* Broke down epics into smaller, manageable user stories for future sprints.

### ****User Stories Creation****

The PO was responsible for creating clear and detailed user stories, ensuring they contained the following:

1. **Story No:** Unique identifier for each story.
2. **Tasks:** Specific activities required to complete the story.
3. **Priority:** Importance of the story in the product backlog.
4. **Acceptance Criteria:** Measurable conditions that define story completion.
5. **BV (Business Value):** Estimated value of the story to stakeholders.
6. **CP (Complexity Points):** Effort estimation for completing the story.

### ****Key Takeaways from the Role****

* **Cross-Functional Collaboration:** Learned how to effectively communicate with stakeholders and development teams to align goals.
* **Vision Development:** Gained experience in crafting a clear and actionable product vision and roadmap.
* **Stakeholder Management:** Mastered techniques for managing expectations and prioritizing features based on value and feasibility.
* **Iterative Improvement:** Participated in continuous improvement activities through sprint retrospectives and backlog refinement.
* **Requirement Detailing:** Enhanced skills in breaking down complex requirements into manageable user stories and prioritizing them.

**Document 5: Product and sprint backlog and product and sprint burn down charts:**

### ****Product Backlog****

The **Product Backlog** is a prioritized list of all the features, functionalities, and enhancements required for the CRM project. It is continuously refined and updated throughout the project lifecycle.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Priority** | **BV** | **CP** | **Sprint** |
| US-001 | Create customer profiles | 1 | High | 500 | 3 | Sprint 1 |
| US-002 | Search feature for customer profiles | 2 | High | 500 | 3 | Sprint 1 |
| US-003 | Automate lead tracking and scoring | 1 | High | 200 | 5 | Sprint 2 |
| US-004 | Warranty tracking feature | 3 | Medium | 100 | 5 | Sprint 3 |
| US-005 | Sales metrics dashboard | 3 | High | 200 | 1 | Sprint 2 |
| US-006 | AI-powered cross-sell recommendations | 2 | Medium | 100 | 2 | Sprint 4 |
| US-007 | Email campaign automation | 3 | High | 200 | 2 | Sprint 3 |
| US-008 | Multi-platform compatibility | 2 | High | 500 | 3 | Sprint 5 |
| US-009 | Role-based access control | 1 | High | 500 | 1 | Sprint 2 |
| US-010 | Complaint tracking and resolution | 1 | High | 200 | 5 | Sprint 3 |
| US-011 | Product catalogue integration | 3 | Medium | 100 | 3 | Sprint 4 |
| US-012 | Service appointment scheduling | 2 | Medium | 100 | 5 | Sprint 5 |
| US-013 | Integrate CRM with payment gateways | 1 | Medium | 200 | 3 | Sprint 5 |
| US-014 | Customer behaviour analytics | 2 | Medium | 500 | 5 | Sprint 4 |
| US-015 | Notifications and reminders | 3 | Medium | 100 | 1 | Sprint 5 |

****

### ****Sprint Backlog****

The **Sprint Backlog** is a subset of the Product Backlog that includes the tasks planned for the current sprint.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Owner** | **Status** | **Estimated Effort (Hours)** |
| US-001 | Create customer profiles | 1 | Developer 1 | In Progress | 01 |
|   | Integrate database for customer profiles | 3 | Developer 2 | To Do | 02 |
|   | Test customer profile functionality | 2 | QA Tester | To Do | 05 |
| US-002 | Search feature for customer profiles | 3 | Developer 3 | In Progress | 01 |
|   | Write test cases for search | 1 | QA Tester | To Do | 03 |
|   | Validate functionality with PO | 2 | Product Owner | To Do | 02 |
| US-009 | Role-based access control | 3 | Developer 4 | In Progress | 03 |
|   | Implement access logic | 2 | Developer 5 | To Do | 01 |
|   | Test role-based access | 3 | QA Tester | To Do | 01 |
| US-003 | Automate lead tracking and scoring | 1 | Developer 3 | In Progress | 02 |
|   | Integrate lead tracking with CRM UI | 2 | Developer 1 | To Do | 03 |
|   | Write test cases for lead tracking | 2 | QA Tester | To Do | 05 |
| US-005 | Sales metrics dashboard | 3 | Developer 4 | To Do | 01 |
|   | Integrate sales metrics API | 1 | Developer 2 | To Do | 03 |
|   | Validate metrics dashboard | 2 | Product Owner | To Do | 02 |
| US-004 | Warranty tracking feature | 3 | Developer 2 | In Progress | 01 |
|   | Create alerts for warranty expiry | 1 | Developer 5 | To Do | 05 |
|   | Write test cases for warranty tracking | 2 | QA Tester | To Do | 03 |
| US-010 | Complaint tracking and resolution | 2 | Developer 3 | To Do | 01 |
|   | Automate complaint notifications | 1 | Developer 1 | To Do | 05 |
|   | Test complaint tracking module | 3 | QA Tester | To Do | 03 |
| US-006 | AI-powered cross-sell recommendations | 1 | Developer 4 | To Do | 01 |
|   | Integrate recommendations in UI | 1 | Developer 3 | To Do | 02 |
|   | Validate AI recommendations | 2 | Product Owner | To Do | 03 |
| US-014 | Customer behaviour analytics | 3 | Developer 2 | To Do | 05 |
|   | Implement data visualization | 2 | Developer 5 | To Do | 01 |
|   | Test analytics dashboard | 3 | QA Tester | To Do | 03 |
| US-008 | Multi-platform compatibility | 1 | Developer 1 | To Do | 05 |
|   | Cross-browser testing | 2 | QA Tester | To Do | 01 |
|   | Fix compatibility issues | 2 | Developer 3 | To Do | 03 |
| US-013 | Integrate CRM with payment gateways | 1 | Developer 2 | To Do | 01 |
|   | Validate payment functionality | 1 | QA Tester | To Do | 03 |
| US-015 | Notifications and reminders | 3 | Developer 5 | To Do | 05 |

****

**Document 6: Sprint meetings:**

**Meeting Type 1: Sprint planning meeting**

|  |  |
| --- | --- |
| **Details** | **Information** |
| **Date** | 08-01-2025 |
| **Time** | 11:00 AM |
| **Location** | APT IT Solutions, Conference Room |
| **Prepared By** | RACHEL GREEN (Scrum Master) |
| **Attendees** | Scrum Master, Product Owner, Development Team, QA Team, Stakeholders (Optional) |

**Agenda Topics**

|  |  |  |
| --- | --- | --- |
| **Topic** | **Presenter** | **Time Allotted (Minutes)** |
| Review of Product Backlog | Product Owner | 10 |
| Sprint Goal Definition | Product Owner | 20 |
| Sprint Backlog Prioritization | Scrum Master | 30 |
| Task Estimation (Story Points/CP) | Development Team  | 15 |
| Resource Planning & Dependencies | Scrum Master | 10 |
| Review of Previous Sprint (if needed) | Business Analyst | 10 |
| Clarifications and Q&A | All | 15 |

**Other Information:**

**Observers**

|  |  |
| --- | --- |
| Senior IT Manager | Mr. Aarav Sharma |
| Sales Director | Ms. Priya Patel |
| Customer Support Lead | Mr. Rohit Kumar |
| Marketing Manager | Ms. Ananya Desai |
| Legal Advisor | Mr. Aditya Sinha |
| Operations Manager | Mr. Vivek Joshi |
| UX/UI Specialist | Ms. Kavita Nair |
| Stakeholder Representative | Mr. Vikram Reddy |

**Resources Required**:

* + Product backlog document
	+ Sprint backlog from the previous sprint
	+ Relevant user stories for the upcoming sprint
	+ Task estimation tools (e.g., planning poker cards)

#### **Special Notes:**

* Ensure all user stories are clear and have sufficient acceptance criteria before tasking.
* Adjust sprint backlog based on team's current capacity and velocity.
* Prioritize stories based on business value and stakeholder requirements.

**Meeting Type 2: Sprint review meeting**

|  |  |
| --- | --- |
| **Details** | **Information** |
| **Date** | 08-01-2025 |
| **Time** | 11:00 AM |
| **Location** | APT IT Solutions, Conference Room |
| **Prepared By** | RACHEL GREEN (Scrum Master) |
| **Attendees** | Scrum Master, Product Owner, Development Team, QA Team, Stakeholders (Optional) |

#### **Sprint Status:**

* A summary of the user stories completed, in progress, or carried over.
* Review of sprint goals and whether the team achieved them.
* Quick recap of the sprint's velocity and overall performance.

#### **Things to Demo:**

* **Client Risk Profile Tracking**: Demo of how the system tracks and updates client risk profiles.
* **Bulk Email Campaigns**: Show how employees can create and send bulk email campaigns.
* **Market Trend Insights**: Demonstration of AI-driven insights for portfolio adjustments based on market trends.
* **Compliance Tracking**: Showcase how compliance with regulatory requirements is managed within the CRM system.
* **Referral and Rewards System**: Demonstrate the tracking and rewarding of client referrals.

#### **Quick Updates:**

* **Completed Features:** The team has completed user stories related to email campaigns, client risk profile updates, and market trend analysis.
* **Challenges Faced:** Encountered some delays in compliance tracking functionality due to missing regulatory data.
* **Stakeholder Feedback:** Positive feedback on portfolio adjustment recommendations and the ease of tracking risk profiles.

#### **What’s next?**

* **Upcoming Sprint Goals:** Focus on integrating client feedback into the CRM and implementing new market insights for proactive portfolio management.
* **Next Steps:**
	+ Address any incomplete user stories or features from the current sprint.
	+ Prioritize features based on business value and stakeholder needs for the upcoming sprint.
	+ Conduct backlog refinement and task estimation.

**Meeting Type 3: Sprint retrospective meeting**

|  |  |
| --- | --- |
| **Details** | **Information** |
| **Date** | 10/01/2025 |
| **Time** | 3:30 PM – 4:30 PM |
| **Location** | Virtual Meeting (Zoom Link) |
| **Prepared By** | Nachiket Hemlani (Business Analyst) |
| **Attendees** | Scrum Master, Product Owner, Development Team, QA Team, Stakeholders (Optional) |

**Agenda:**

1. **Review of Sprint Goals and Status**: Discuss if the sprint goals were achieved and analyse overall sprint performance.
2. **What Went Well**: Reflect on positive outcomes and what contributed to the team's success during the sprint.
3. **What Didn’t Go Well**: Identify challenges or roadblocks faced during the sprint and discuss how they impacted delivery.
4. **Actionable Insights**: Suggest improvements or changes to enhance the process and performance for future sprints.
5. **Questions**: Address any open questions or concerns raised by team members or stakeholders.
6. **Reference**: Review feedback from sprint review meeting and adjust plans accordingly for the next sprint.

#### **What Went Well?**

* **Effective Communication**: The team had clear and open communication, which helped in resolving blockers quickly.
* **On-Time Delivery**: Most of the user stories, especially the client risk profile tracking and bulk email campaigns, were completed on time.
* **Collaboration**: Cross-functional collaboration between developers and business analysts was highly productive.
* **Stakeholder Involvement**: Stakeholders provided valuable feedback promptly, which allowed the team to align quickly with business goals.

#### **What Didn’t Go Well?**

* **Compliance Tracking Delay**: There were delays in developing the compliance tracking feature due to missing or delayed regulatory data.
* **Unclear Requirements**: Some user stories lacked detailed acceptance criteria, leading to rework during development.
* **Task Estimation**: Estimation of complexity for a few user stories was inaccurate, leading to slight delays in delivery.

#### **Questions:**

* How can we improve our estimation process for upcoming sprints?
* What can be done to ensure regulatory data is available in time for compliance-related features?
* How can we streamline backlog refinement to ensure user stories are more detailed?

#### **Reference:**

* Feedback from the sprint review meeting emphasized the need for better documentation for compliance features.
* The backlog needs to be more refined and detailed to avoid ambiguity in user stories and acceptance criteria.

**Meeting Type 4: Daily Stand-up meeting**

Week "2" (from 12-01-2025 to 18-01-2025)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Question** | **Name/Role** | **Monday** | **Tuesday** | **Wednesday** | **Thursday** | **Friday** |
| **What did you do yesterday?** | **Developer 1** | Completed user story for client risk profile tracking. | Worked on implementing compliance tracking. | Continued testing the bulk email campaign feature. | Fixed bugs in client portal. | Deployed feature to staging environment. |
|   | **Developer 2** | Worked on UI for market insights dashboard. | Integrated market data API into the CRM. | Finished UI for client referral tracking. | Conducted unit tests on compliance feature. | Started developing the referral and rewards system. |
|   | **Developer 3** | Reviewed user stories and backlog. | Assisted in bug fixes and testing. | Worked on data validation for portfolio analysis feature. | Completed testing of market insights dashboard. | Collaborated on feature deployment to staging. |
| **What will you do today?** | **Developer 1** | Work on finalizing the client risk profile functionality. | Continue working on compliance feature testing. | Start integration of new client on boarding system. | Continue bug fixes for the client portal. | Review code and do a final round of testing. |
|   | **Developer 2** | Continue development of the client referral system. | Test the integration of the market data API. | Continue UI work on the portfolio tracking feature. | Finalize the UI for the client portal. | Conduct regression testing on completed features. |
|   | **Developer 3** | Review and update sprint backlog for next sprint. | Help with UI design for upcoming user stories. | Prepare documentation for the CRM features. | Conduct additional testing and troubleshooting. | Assist with deployment and testing final features. |
| **What (if any) is blocking your progress?** | **Developer 1** | Waiting for final regulatory data to complete the compliance tracking. | No blockers at the moment. | Need clearer requirements for the new on boarding system. | Awaiting feedback from the Product Owner for final testing. | No blockers at the moment. |
|   | **Developer 2** | Need approval on market insights dashboard design. | Need access to the latest API documentation. | No blockers at the moment. | Need clarification on client referral logic. | Need confirmation on feature dependencies. |
|   | **Developer 3** | No blockers. | Need clarity on feature priorities for next sprint. | No blockers at the moment. | Awaiting final approval on client portal design. | Need clarification on the testing environment setup. |