**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: 08 | | 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: 10 | | 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: 08 | | 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. | | | |

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| --- | --- | --- | --- |
| **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: 09 | | CP: 04 | |
| **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: 09 | | CP: 06 | |
| **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: 08 | | CP: 04 | |
| **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: 10 | | CP: 07 | |
| **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: 08 | | 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. | | | |

### ****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****

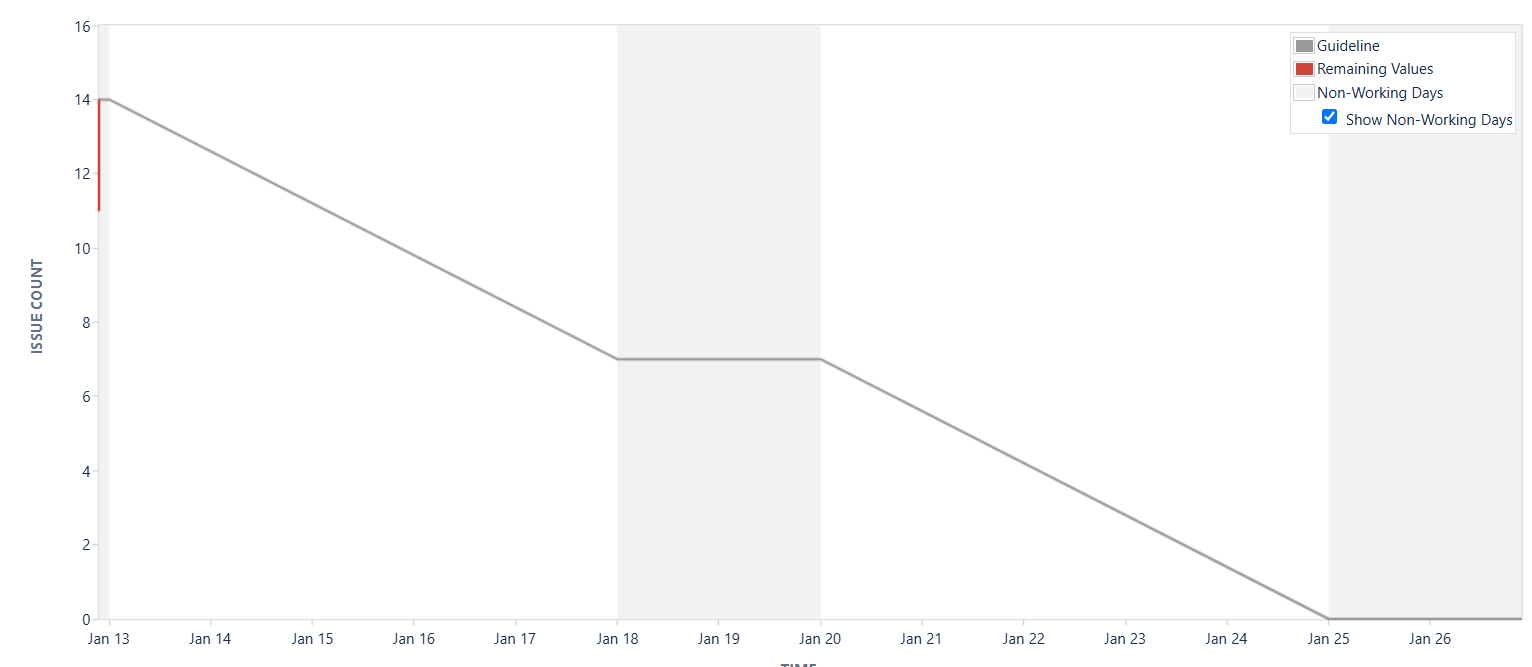
* **Cross-Functional Collaboration:** Learned how to effectively communicate with stakeholders and development teams to align goals.
* **Vision Development:** Gained experience in crafting a clear and actionable product vision and roadmap.
* **Stakeholder Management:** Mastered techniques for managing 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.

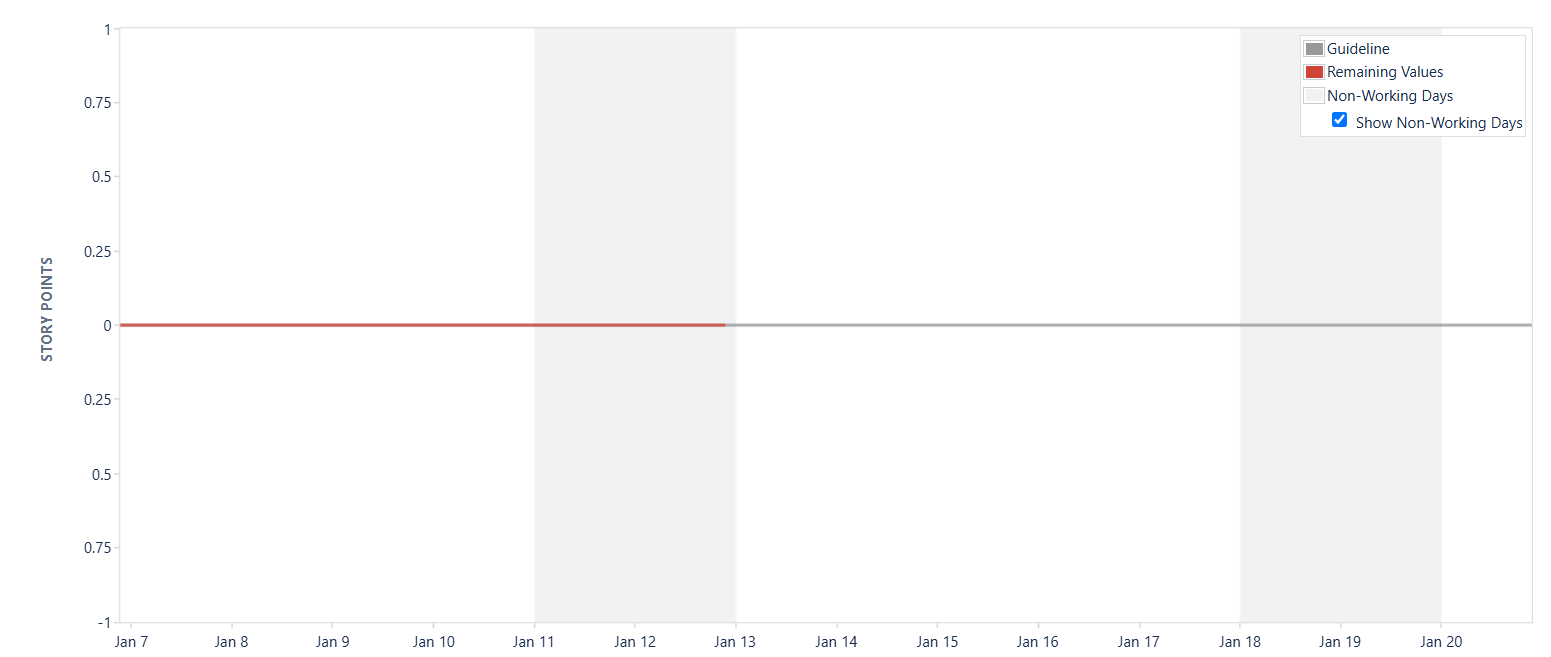
|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Priority** | **BV** | **CP** | **Sprint** |
| US-001 | Create customer profiles | Design UI, integrate database, testing | High | 8 | 3 | Sprint 1 |
| US-002 | Search feature for customer profiles | Develop search functionality, test cases | High | 9 | 3 | Sprint 1 |
| US-003 | Automate lead tracking and scoring | Implement scoring logic, UX integration | High | 10 | 5 | Sprint 2 |
| US-004 | Warranty tracking feature | Develop warranty module, alerts, testing | Medium | 8 | 5 | Sprint 3 |
| US-005 | Sales metrics dashboard | Design widgets, data integration | High | 9 | 4 | Sprint 2 |
| US-006 | AI-powered cross-sell recommendations | AI logic, UI integration, validation | Medium | 9 | 6 | Sprint 4 |
| US-007 | Email campaign automation | Develop scheduler, tracking analytics | High | 8 | 4 | Sprint 3 |
| US-008 | Multi-platform compatibility | Develop responsive design, cross-testing | High | 10 | 7 | Sprint 5 |
| US-009 | Role-based access control | Define roles, implement access logic | High | 10 | 6 | Sprint 2 |
| US-010 | Complaint tracking and resolution | Create module, automated notifications | High | 8 | 5 | Sprint 3 |
| US-011 | Product catalogue integration | Develop catalogue module, sync with CRM | Medium | 8 | 4 | Sprint 4 |
| US-012 | Service appointment scheduling | Implement scheduling logic, notifications | Medium | 7 | 4 | Sprint 5 |
| US-013 | Integrate CRM with payment gateways | Payment API, testing, documentation | Medium | 7 | 6 | Sprint 5 |
| US-014 | Customer behaviour analytics | Create reports, visualization | Medium | 9 | 5 | Sprint 4 |
| US-015 | Notifications and reminders | Develop alerts, configure preferences | Medium | 8 | 4 | Sprint 5 |

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### ****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 | Design UI for customer profiles | Developer 1 | In Progress | 10 |
|  | Integrate database for customer profiles |  | Developer 2 | To Do | 12 |
|  | Test customer profile functionality |  | QA Tester | To Do | 8 |
| US-002 | Search feature for customer profiles | Develop search functionality | Developer 3 | In Progress | 15 |
|  | Write test cases for search |  | QA Tester | To Do | 8 |
|  | Validate functionality with PO |  | Product Owner | To Do | 4 |
| US-009 | Role-based access control | Define roles and permissions | Developer 4 | In Progress | 12 |
|  | Implement access logic |  | Developer 5 | To Do | 16 |
|  | Test role-based access |  | QA Tester | To Do | 10 |
| US-003 | Automate lead tracking and scoring | Implement scoring logic | Developer 3 | In Progress | 12 |
|  | Integrate lead tracking with CRM UI |  | Developer 1 | To Do | 10 |
|  | Write test cases for lead tracking |  | QA Tester | To Do | 6 |
| US-005 | Sales metrics dashboard | Design dashboard widgets | Developer 4 | To Do | 10 |
|  | Integrate sales metrics API |  | Developer 2 | To Do | 12 |
|  | Validate metrics dashboard |  | Product Owner | To Do | 4 |
| US-004 | Warranty tracking feature | Develop warranty module | Developer 2 | In Progress | 15 |
|  | Create alerts for warranty expiry |  | Developer 5 | To Do | 8 |
|  | Write test cases for warranty tracking |  | QA Tester | To Do | 6 |
| US-010 | Complaint tracking and resolution | Develop complaint module UI | Developer 3 | To Do | 12 |
|  | Automate complaint notifications |  | Developer 1 | To Do | 10 |
|  | Test complaint tracking module |  | QA Tester | To Do | 8 |
| US-006 | AI-powered cross-sell recommendations | Develop AI recommendation logic | Developer 4 | To Do | 18 |
|  | Integrate recommendations in UI |  | Developer 3 | To Do | 10 |
|  | Validate AI recommendations |  | Product Owner | To Do | 4 |
| US-014 | Customer behaviour analytics | Create analytics reports | Developer 2 | To Do | 12 |
|  | Implement data visualization |  | Developer 5 | To Do | 8 |
|  | Test analytics dashboard |  | QA Tester | To Do | 6 |
| US-008 | Multi-platform compatibility | Optimize UI for mobile and tablet | Developer 1 | To Do | 15 |
|  | Cross-browser testing |  | QA Tester | To Do | 10 |
|  | Fix compatibility issues |  | Developer 3 | To Do | 8 |
| US-013 | Integrate CRM with payment gateways | Implement payment API | Developer 2 | To Do | 14 |
|  | Validate payment functionality |  | QA Tester | To Do | 8 |
| US-015 | Notifications and reminders | Develop alert module | Developer 5 | To Do | 10 |

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**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 analyze 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. |