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

**1. Acceptance Criteria:**   
Specific conditions or scenarios that a backlog item must satisfy to be accepted by the Product Owner or stakeholders.Itensures that the developed feature meets business goals and solves the problem it was intended to address.

**Example**:

For a login feature, acceptance criteria might include:

* Users can log in with a valid email and password.
* An error message is displayed for incorrect login credentials.

**2. Quality Criteria:**   
Standards or metrics to ensure the deliverables meet predefined quality benchmarks.  
Guarantees that the deliverable aligns with technical and design standards, offering a reliable and seamless user experience.

**Example**:

* The application must load within 3 seconds on a standard internet connection.
* Code must pass a peer review for adherence to coding guidelines.

### ****Levels of DoD****

* **User Story Level**:   
  Focuses on the completion of individual features or functionalities, ensuring that each story meets its definition of done before it is marked complete.
* **Sprint Level**:   
  Ensures all stories within a sprint meet the DoD and that the sprint goal is achieved. This includes integrating and testing the combined functionality of stories.
* **Release Level**:   
  Verifies that the product is ready for deployment. This includes ensuring the product meets all stakeholder expectations, is tested end-to-end, and complies with legal or regulatory requirements.

**Checklist for DOD:**

|  |  |  |
| --- | --- | --- |
| **Level** | **Checklist Component** | **Description** |
| **USER STORY** | |  | | --- | | Produced code for presumed functionalities | | Written code are delivered as per expected features outlined in the user story. |
|  | Assumptions of User Story met | Confirmed all implicit and explicit conditions stated (or implied) in the user story are satisfied. |
|  | Unit tests written and passing | Automated tests verified that individual pieces of code work as intended. |
|  | Feature tested against acceptance criteria | Ensured functionality to customer requirements criteria are satisfied. |
|  | Feature ok-ed by UX designer | Confirmed the feature meets design and usability expectations. |
|  | QA performed & issues resolved | Quality Assurance tests validated and resolved issues at the user story level. |
|  | Peer Code Review performed | Peer reviews ensured code quality, adherence to standards, and error detection. |
|  | Documentation updated | Updates are made to reflect new functionality, such as user manuals or internal guides. |
| **SPRINT** | Project builds without errors | Ensured the system compiles successfully with no errors across all completed stories in the sprint. |
|  | Project deployed on the test environment identical to production platform | Validated the functionality of all sprint stories in a staging/test environment similar to production. |
|  | Tests on devices/browsers listed in the project assumptions passed | Confirmed cross-browser and cross-device compatibility for stories completed during the sprint. |
|  | Refactoring completed | Necessary code clean-up or improvements are finalized before the sprint ends. |
|  | Sprint backlog items meet their acceptance criteria | Each story or task in the sprint is validated against its acceptance criteria. |
| **RELEASE** | Feature ok-ed by Product Owner | The Product Owner approves the completed functionality for release, confirming it meets business needs. |
|  | QA performed & integration issues resolved | Ensured end-to-end testing of all features and resolved integration issues across multiple sprint deliveries. |
|  | Configuration/build changes documented | All changes related to the release are documented for reproducibility and future reference. |
|  | Documentation updated | Comprehensive updates are made to user manuals, technical documentation, and release notes. |
|  | Project tested end-to-end | The entire system is tested across all integrated features to ensure alignment with business goals. |

**Document 2- Product Vision:**

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| --- | --- | --- | --- |
| **Scrum Project Name** | **Client Connect** |  |  |
| **Venue** | |  | | --- | | PUNE | |  |  |
| **Date: 05/01/2025** | **Start time**: 10.00 AM | **End time**: 12.00 PM | **Duration**: 2 H |
| **Client** | SOONY Company |  |  |
| **Stakeholder list** | Priya Mehta (Project Sponsor) |  |  |
|  | Senior Sales and Marketing Leaders from SOONY Electronics |  |  |
|  | Sales & Marketing Team Representatives |  |  |
|  | End-user Representatives (Customer Service Agents) |  |  |
|  |  |  |  |
|  | **Scrum Team** | | |
| **Scrum Master:** | Rajesh Kumar |  |  |
| **Product owner:** | Priya Mehta |  |  |
| **Scrum Developer 1** | Ravi Sharma |  |  |
| **Scrum Developer 2** | Neha Agarwal |  |  |
| **Scrum Developer 3** | Arjun Patel |  |  |
| **Scrum Developer 4** | Kavita Reddy |  |  |
| **Scrum Developer 5** | Sameer Malik |  |  |

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| **Vision** | | | |
| **Target group** | **Needs** | **Product** | **Value** |
| **Which market segment does the product address?** | **What problem does the product solve?** | **What product is it?** | **How is the product going to benefit the company?** |
| The **consumer electronics industry**, focusing on manufacturers, retailers, and distributors of electronics such as TVs, smartphones, and home appliances. | Inconsistent tracking of customer purchases and warranty claims. | A comprehensive CRM platform tailored for the electronics business to manage customer interactions, automate workflows, and provide actionable insights. | Increased customer loyalty through improved after-sales service. |
| **Who are the target users and customers?** | Lack of integration between sales, marketing, and support teams. | **What makes it desirable and special?** | Enhanced sales and marketing strategies through data-driven insights. |
| **Target Users**: | Inefficient resolution of customer complaints and service requests. | Integration with warranty and service tracking systems. | **What are the business goals?** |
| Sales Teams managing retail and wholesale orders. |  | AI-powered recommendations for upselling and cross-selling. |  |
| Customer Support Agents handling technical queries and complaints. | **Which benefit does it provide?** | Advanced analytics to predict market trends and optimize sales strategies. | Reduce customer churn by 25% through personalized interactions. |
| Marketing Teams running campaigns for new product launches. | Centralized customer management for purchases, warranties, and complaints. | **Is it feasible to develop the product?** | Achieve a 20% increase in cross-sell and upsell opportunities in the first year. |
| **Target Customers**: | Improved cross-functional collaboration between teams. | Yes, leveraging modern cloud and AI technologies, the product is feasible with existing tools, platforms, and development resources. | **What is the business model?** |
| Business leaders and executives looking for insights to improve operational efficiency. | Faster resolution times for support tickets and service requests. |  | SaaS subscription model with modular pricing for basic CRM, advanced analytics, and service management features. |
|  |  |  |  |

**Document 3: User stories**:

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| **USER STORY 1:** | Tasks: 1 | | Priority: HIGH |
| **As a user**,  I want to create and manage customer profiles  **So that I can** store and access customer information efficiently. | | | |
| BV: 500 | | CP: 1+2 = 3 | |
| **ACCEPTANCE CRITERIA**  **-** User can input and save customer name, contact information, and address.  **-** Customer profiles are stored securely in the database.  **-** Profiles can be edited and updated as needed. | | | |

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| **USER STORY 2:** | Tasks: 1 | | Priority: HIGH |
| **As a user**,  I want to track leads and assign scores based on interactions  **So that I can** prioritize high-value opportunities. | | | |
| BV: 500 | | CP: 2+2 = 4 | |
| **ACCEPTANCE CRITERIA**  **-** Leads are categorized and scored based on predefined criteria.  **-** Notifications are triggered for high-priority leads.  **-** Lead status is updated in real-time | | | |

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| **USER STORY 3:** | Tasks: 2 | | Priority: MEDIUM |
| **As a user**,  I want to track product warranties  **So that I can** provide accurate service information to customers. | | | |
| BV: 300 | | CP: 2+1 = 3 | |
| **ACCEPTANCE CRITERIA**  **-** Warranty details can be linked to customer profiles.  **-** System alerts when a warranty is close to expiration. | | | |

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| **USER STORY 4:** | Tasks: 2 | | Priority: HIGH |
| **As a user**,  I want a customizable dashboard to view sales metrics  **So that I can** analyse performance easily. | | | |
| BV: 500 | | CP: 1+3 = 4 | |
| **ACCEPTANCE CRITERIA**  **-** Dashboards display metrics like revenue, lead conversion, and sales growth.  **-** Widgets can be added, removed, or customized by the user. | | | |

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| **USER STORY 5:** | Tasks: 2 | | Priority: MEDIUM |
| **As a user**,  I want AI-powered suggestions for cross-selling and upselling  **So that I can** increase revenue per customer. | | | |
| BV: 300 | | CP: 01 | |
| **ACCEPTANCE CRITERIA**  **-** System suggests additional products based on purchase history.  **-** Recommendations are visible on the customer profile page. | | | |

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| **USER STORY 6:** | Tasks: 2 | | Priority: HIGH |
| **As a user**,  I want to automate email campaigns  **So that I can** engage customers more effectively. | | | |
| BV: 500 | | CP: 04 | |
| **ACCEPTANCE CRITERIA**  **-** Users can schedule and send bulk emails.  **-** System tracks open rates and click-through rates. | | | |

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| **USER STORY 7:** | Tasks: 1 | | Priority: HIGH |
| **As a user**,  I want the CRM to work on mobile and desktop platforms  **So that I can** access it anytime. | | | |
| BV: 300 | | CP: 03 | |
| **ACCEPTANCE CRITERIA**  **-** System is accessible on web and mobile devices.  **-** Responsive design ensures usability across platforms. | | | |

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| **USER STORY 8:** | Tasks: 3 | | Priority: HIGH |
| **As a user**,  I want to log and monitor customer complaints  **So that I can** ensure timely resolution. | | | |
| BV: 500 | | CP: 02 | |
| **ACCEPTANCE CRITERIA**  **-** Complaint records are linked to customer profiles.  **-** Notifications are sent for unresolved complaints after 48 hours. | | | |

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| **USER STORY 9:** | Tasks: 1 | | Priority: MEDIUM |
| **As a user**,  I want a product catalogue in the CRM  **So that I can** quickly access product details. | | | |
| BV: 300 | | CP: 03 | |
| **ACCEPTANCE CRITERIA**  **-** Products can be added, updated, and categorized.  **-** Catalogue integrates with the sales module. | | | |

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| **USER STORY 10:** | Tasks: 3 | | Priority: MEDIUM |
| **As a user**,  I want to schedule service appointments  **So that I can** efficiently manage resources. | | | |
| BV: 300 | | CP: 04 | |
| **ACCEPTANCE CRITERIA**  **-** Appointment slots are displayed dynamically.  **-** Confirmation emails are sent to customers. | | | |

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| **USER STORY 11:** | Tasks: 3 | | Priority: MEDIUM |
| **As a user**,  I want to process payments through the CRM  **So that I can** streamline the sales process. | | | |
| BV: 300 | | CP: 02 | |
| **ACCEPTANCE CRITERIA**  **-** Payment records are automatically linked to customer profiles.  **-** Invoices are generated and emailed post-payment. | | | |

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| **USER STORY 12:** | Tasks: 3 | | Priority: MEDIUM |
| **As a user**,  I want to analyse customer behaviour  **So that I can** tailor marketing strategies. | | | |
| BV: 200 | | CP: 01 | |
| **ACCEPTANCE CRITERIA**  **-** Reports include purchase trends and engagement patterns.  **-** Data can be exported for further analysis. | | | |

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| **USER STORY 13:** | Tasks: 3 | | Priority: MEDIUM |
| **As a user**,  I want to receive reminders for tasks and follow-ups  **So that I can** stay on top of my activities. | | | |
| BV: 200 | | CP: 03 | |
| **ACCEPTANCE CRITERIA**  **-** Notifications can be customized (e.g., email, SMS).  **-** Alerts are sent for overdue tasks. | | | |

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| **USER STORY 14:** | Tasks: 3 | | Priority: MEDIUM |
| As an admin  I want to delete multiple records at once  So that I can save time and effort | | | |
| BV: 300 | | CP: 01 | |
| **ACCEPTANCE CRITERIA**  **-** Bulk deletion must provide a confirmation step and undo option within 5 minutes. | | | |

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| **USER STORY 15:** | Tasks: 3 | | Priority: MEDIUM |
| As a user  I want to filter customer profiles based on various criteria  So that I can locate specific groups of customers | | | |
| BV: 300 | | CP: 02 | |
| **ACCEPTANCE CRITERIA**  **-** Filters should allow combinations like location + purchase history + lead status. | | | |

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| **USER STORY 16:** | Tasks: 3 | | Priority: MEDIUM |
| As a sales executive  I want to receive updates when leads change stages  So that I can follow up effectively | | | |
| BV: 200 | | CP: 03 | |
| **ACCEPTANCE CRITERIA**  **-** Notifications should show lead name, current stage, and time of update. | | | |

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| **USER STORY 17:** | Tasks: 3 | | Priority: MEDIUM |
| As an admin  I want to integrate the CRM with third-party tools  So that I can streamline workflows | | | |
| BV: 300 | | CP: 04 | |
| **ACCEPTANCE CRITERIA**  **-** API should support integration with tools like SAP, Salesforce, and QuickBooks. | | | |

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| **USER STORY 18:** | Tasks: 3 | | Priority: MEDIUM |
| As a marketing team member  I want to track customer purchases and loyalty points  So that I can design loyalty programs | | | |
| BV: 300 | | CP: 04 | |
| **ACCEPTANCE CRITERIA**  **-** Loyalty tracking must show points earned, redeemed, and balance. | | | |

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| **USER STORY 19:** | Tasks: 3 | | Priority: MEDIUM |
| As a sales executive  I want to assign scores to leads based on their potential  So that I can focus on high-value prospects | | | |
| BV: 200 | | CP: 03 | |
| **ACCEPTANCE CRITERIA**  **-** Lead scoring should consider factors like interaction history and purchase intent. | | | |

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| **USER STORY 20:** | Tasks: 3 | | Priority: MEDIUM |
| As a finance team member  I want to process payments in different currencies  So that I can cater to global customers | | | |
| BV: 300 | | CP: 02 | |
| **ACCEPTANCE CRITERIA**  **-** Multi-currency support should include real-time exchange rates. | | | |

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| **USER STORY 21:** | Tasks: 3 | | Priority: LOW |
| As a manager  I want to analyse feedback trends  So that I can improve customer experience | | | |
| BV: 100 | | CP: 04 | |
| **ACCEPTANCE CRITERIA**  **-** Analytics should show satisfaction scores and common themes in feedback. | | | |

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| **USER STORY 22:** | Tasks: 3 | | Priority: LOW |
| As a user  I want to switch to dark mode  So that I can reduce eye strain during prolonged use | | | |
| BV: 100 | | CP: 01 | |
| **ACCEPTANCE CRITERIA**  **-** Dark mode should apply across all sections of the CRM. | | | |
|  | | | |
| **USER STORY 23:** | Tasks: 3 | | Priority: MEDIUM |
| As a user  I want to send files through the chat feature  So that I can collaborate efficiently with customers and team | | | |
| BV: 300 | | CP: 02 | |
| **ACCEPTANCE CRITERIA**  **-** File sharing should support PDFs, Word docs, images, and Excel files up to 10 MB. | | | |

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| **USER STORY 24:** | Tasks: 3 | | Priority: MEDIUM |
| As a sales executive  I want to collaborate on customer profiles and tasks  So that I can ensure seamless teamwork | | | |
| BV: 300 | | CP: 01 | |
| **ACCEPTANCE CRITERIA**  **-** Real-time collaboration should show changes made by other users instantly. | | | |

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| **USER STORY 25:** | Tasks: 3 | | Priority: HIGH |
| As a manager  I want to track sales milestones  So that I can ensure targets are met | | | |
| BV: 500 | | CP: 02 | |
| **ACCEPTANCE CRITERIA**  **-** Milestone tracking must include monthly and quarterly sales targets. | | | |

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| **USER STORY 26:** | Tasks: 3 | | Priority: MEDIUM |
| As a sales executive  I want to set reminders for follow-ups  So that I can never miss important touch points | | | |
| BV: 200 | | CP: 04 | |
| **ACCEPTANCE CRITERIA**  **-** Reminders must include the customer name, follow-up reason, and due date. | | | |

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| **USER STORY 27:** | Tasks: 3 | | Priority: HIGH |
| As a marketing team member  I want to use predictive models to forecast trends  So that I can prepare strategies based on likely outcomes | | | |
| BV: 500 | | CP: 03 | |
| **ACCEPTANCE CRITERIA**  **-** Predictive analytics should forecast sales trends and customer churn risk. | | | |

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| **USER STORY 28:** | Tasks: 3 | | Priority: MEDIUM |
| As a customer  I want to get instant answers to my questions  So that I can resolve my concerns without waiting for an agent | | | |
| BV: 300 | | CP: 04 | |
| **ACCEPTANCE CRITERIA**  **-** The Chabot must answer FAQs and redirect complex queries to live agents. | | | |

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| **USER STORY 29:** | Tasks: 3 | | Priority: HIGH |
| As a user  I want to access the CRM from my smartphone  So that I can manage tasks while away from the office | | | |
| BV: 500 | | CP: 01 | |
| **ACCEPTANCE CRITERIA**  **-** Mobile app must support all key CRM features and sync with the web platform. | | | |

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| **USER STORY 30:** | Tasks: 3 | | Priority: MEDIUM |
| As a user  I want to tag customers with keywords  So that I can filter and group profiles easily | | | |
| BV: 300 | | CP: 02 | |
| **ACCEPTANCE CRITERIA**  **-** Tags must support multiple keywords and be searchable. | | | |

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| **USER STORY 31:** | Tasks: 3 | | Priority: HIGH |
| As a marketing team member  I want to analyse customer behaviour patterns  So that I can make data-driven decisions | | | |
| BV: 500 | | CP: 04 | |
| **ACCEPTANCE CRITERIA**  **-** Analytics should provide insights into purchase frequency and customer preferences. | | | |

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| **USER STORY 32:** | Tasks: 3 | | Priority: MEDIUM |
| As an admin  I want to view a log of all administrative actions  So that I can track who made changes and when | | | |
| BV: 300 | | CP: 03 | |
| **ACCEPTANCE CRITERIA**  **-** Audit logs must show timestamps, user actions, and affected records. | | | |

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| **USER STORY 33:** | Tasks: 3 | | Priority: MEDIUM |
| As a user  I want to sync data automatically  So that I can always work with the latest information | | | |
| BV: 200 | | CP: 03 | |
| **ACCEPTANCE CRITERIA**  **-** Real-time syncing should occur within 5 seconds of updates. | | | |

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| **USER STORY 34:** | Tasks: 3 | | Priority: LOW |
| As a sales executive  I want to chat with customers through the CRM  So that I can respond to customer queries faster | | | |
| BV: 100 | | CP: 01 | |
| **ACCEPTANCE CRITERIA**  **-** Chat integration should support platforms like WhatsApp and Messenger. | | | |

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| **USER STORY 35:** | Tasks: 3 | | Priority: MEDIUM |
| As a user  I want to attach files to customer profiles  So that I can have all related information in one place | | | |
| BV: 300 | | CP: 01 | |
| **ACCEPTANCE CRITERIA**  **-** File attachments should accept PDFs, Word docs, and images. | | | |

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| **USER STORY 36:** | Tasks: 3 | | Priority: HIGH |
| As a manager  I want to view team performance metrics  So that I can assess team efficiency | | | |
| BV: 500 | | CP: 02 | |
| **ACCEPTANCE CRITERIA**  **-** Performance metrics should show task completion rates and time spent per task. | | | |

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| **USER STORY 37:** | Tasks: 3 | | Priority: HIGH |
| As an admin  I want to enable two-factor authentication  So that I can ensure data is protected | | | |
| BV: 500 | | CP: 03 | |
| **ACCEPTANCE CRITERIA**  **-** Login process must send a one-time code to the user’s email or phone. | | | |

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| **USER STORY 38:** | Tasks: 3 | | Priority: LOW |
| As a non-English speaking user  I want to use the CRM in my preferred language  So that I can access the platform comfortably | | | |
| BV: 100 | | CP: 04 | |
| **ACCEPTANCE CRITERIA**  **-** Language support should include English, Hindi, and regional languages. | | | |

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| **USER STORY 39:** | Tasks: 3 | | Priority: MEDIUM |
| As a user  I want to receive notifications for upcoming activities  So that I can never miss important deadlines | | | |
| BV: 200 | | CP: 01 | |
| **ACCEPTANCE CRITERIA**  **-** Notifications should pop up 15 minutes before scheduled activities. | | | |

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| **USER STORY 40:** | Tasks: 3 | | Priority: MEDIUM |
| As an admin  I want to generate invoices for completed sales  So that I can save time on manual billing | | | |
| BV: 200 | | CP: 04 | |
| **ACCEPTANCE CRITERIA**  **-** Invoices must include customer name, purchased items, and total cost. | | | |

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

As the Product Owner for the **Client Connect** project, I served as the liaison between stakeholders from SOONY Electronics and the Scrum team at APT IT Solutions. My primary role was to ensure the product vision and roadmap aligned with the market need, stakeholder expectations, and the overarching goal of delivering a CRM system that enhances customer engagement and operational efficiency.

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

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

For this CRM project, I conducted:

* **Market Need Analysis:**
  + Identified the demand for an advanced CRM solution tailored to the electronics industry.
  + Explored the gaps in existing CRM systems, particularly in handling warranty tracking and cross-selling capabilities.
* **Competitor Analysis:**
  + Researched similar CRM tools in the market, focusing on features like lead scoring, complaint resolution, and multi-platform compatibility.

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

* Performed due diligence on the market opportunity for a specialized CRM tailored to the electronics business.
* Validated the potential ROI and long-term benefits, such as improved customer retention and streamlined sales processes.

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

* **Product Vision:** Developed a vision for a CRM tool that acts as a single source of truth for customer data while offering AI-driven insights for enhanced business decisions.
* **Roadmap:**
  + Created a roadmap with high-level features like customer profiling, warranty tracking, sales metrics dashboards, and automated lead tracking.
  + Established clear timelines for feature delivery across sprints.

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

* Collaborated with stakeholders to gather feature requirements and prioritize them based on ROI and business value.
* Prioritized critical features like role-based access, payment gateway integration, and lead scoring during the initial sprints.

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

* Prioritized backlog items to align with the project’s sprint goals.
* Continuously reprioritized based on stakeholder feedback, ensuring the CRM features met evolving business needs.
* Planned epics such as:
  + Customer Data Management
  + Sales and Marketing Automation
  + Analytics and Reporting

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

* **Sprint Reviews:** Regularly reviewed the sprint progress to ensure the deliverables met the project objectives and stakeholder expectations.
* **Sprint Retrospectives:** Collaborated with the Scrum Master and Business Analyst to identify challenges and implement process improvements.
* **Adaptability:** Adjusted priorities and epics when necessary, based on feedback and changing business dynamics.

### ****Sprint Meetings Conducted****

1. **Sprint Planning Meetings:**
   * Worked closely with the Scrum team to define sprint goals, selecting backlog items aligned with high-priority business requirements.
2. **Daily Scrum Meetings:**
   * Monitored the team's progress and resolved impediments.
3. **Sprint Review Meetings:**
   * Presented completed features such as the customer profile module and warranty tracking.
   * Gathered valuable feedback from stakeholders.
4. **Sprint Retrospective Meetings:**
   * Analysed the team's performance and identified areas for improvement, such as refining user story details.
5. **Backlog Refinement Meetings:**
   * Collaborated with the Business Analyst to ensure backlog items were well-documented and ready for development.

### ****User Stories Creation for the CRM Project****

For this project, user stories were created with the following details:

* **Story Number:** Each user story was assigned a unique identifier for tracking.
* **Tasks:** Defined the specific activities required to complete the user story.
* **Priority:** Set based on business needs and ROI.
* **Acceptance Criteria:** Clearly stated the conditions for the story to be considered done.
* **BV (Business Value):** Quantified the value added to the business.
* **CP (Complexity Points):** Estimated the effort required to implement the story.

### ****Key Contributions to the CRM Project****

1. **Product Vision:**
   * Envisioned a CRM system tailored for the electronics business, focusing on features like complaint management, lead scoring, and analytics.
2. **Feature Management:**
   * Defined and broke down key features into epics and user stories.
   * Prioritized features like multi-platform compatibility and cross-sell recommendations to deliver maximum value.
3. **Stakeholder Communication:**
   * Acted as the point of contact for stakeholders, ensuring their requirements were translated into actionable features for the Scrum team.

### ****Lessons Learned****

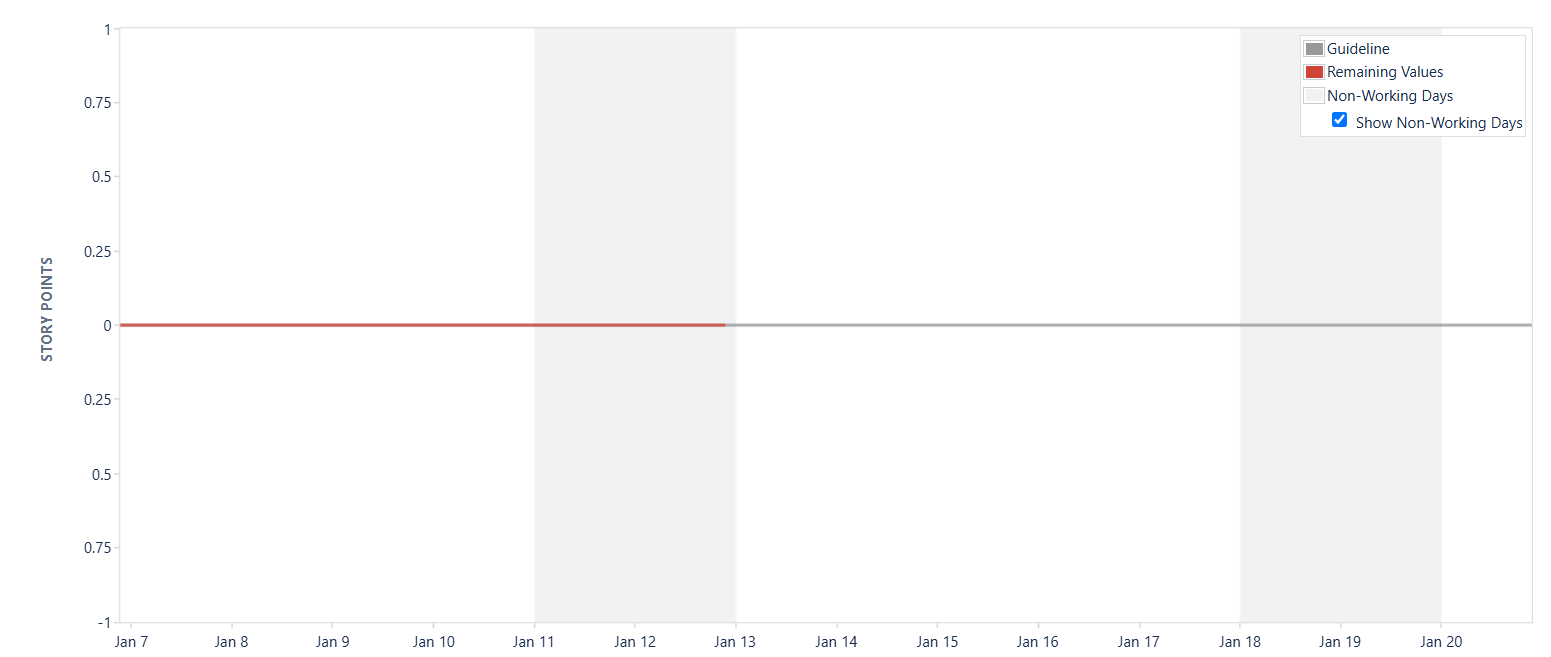
* **Market Dynamics:** Gained deeper insights into the CRM needs of the electronics industry.
* **User Story Creation:** Refined the process of creating clear and actionable user stories with detailed acceptance criteria.
* **Sprint Management:** Learned how to adapt sprint goals based on feedback, ensuring continuous value delivery.
* **Collaboration:** Enhanced skills in working closely with cross-functional teams to achieve project objectives.

**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.

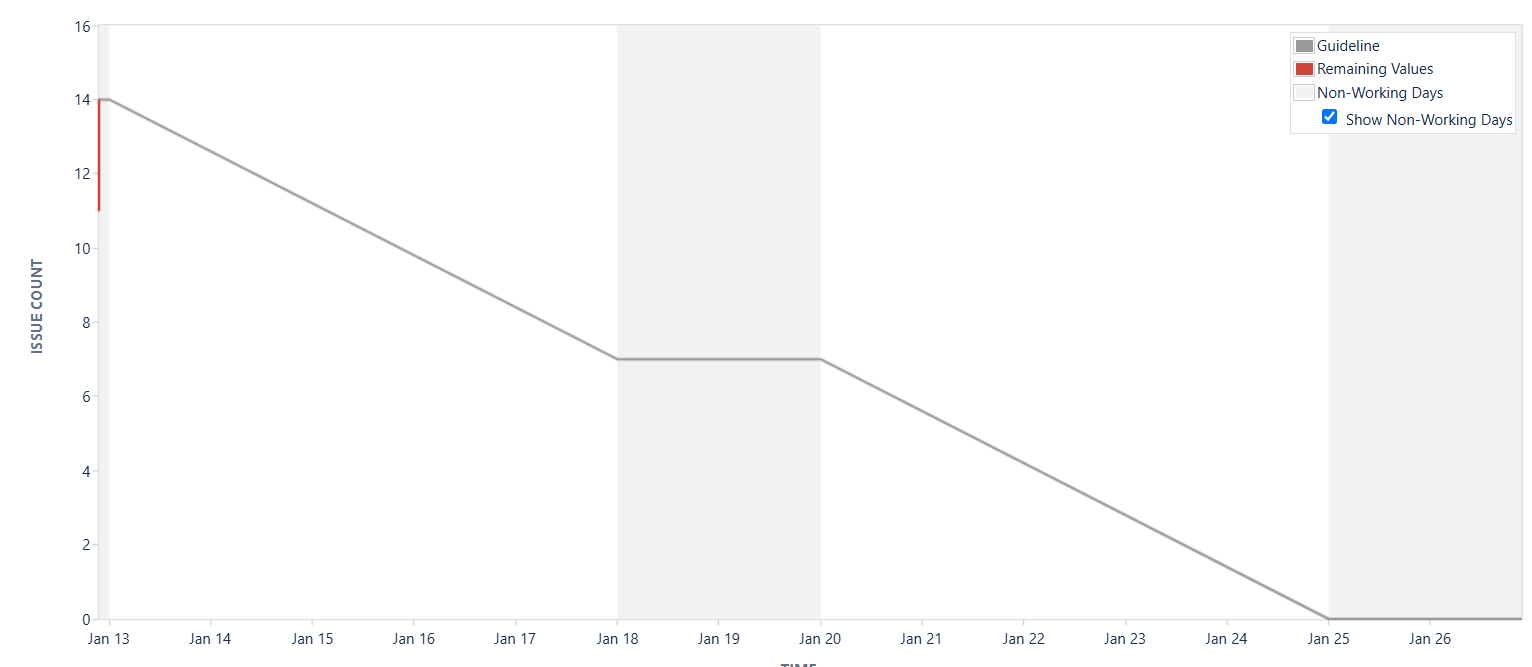
|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Priority** | **BV** | **CP** | **Sprint** |
| US-001 | Create customer profiles | 1 | High | 500 | 01 | Sprint 1 |
| US-002 | Search feature for customer profiles | 2 | High | 500 | 02 | Sprint 1 |
| US-003 | Automate lead tracking and scoring | 1 | High | 500 | 04 | Sprint 2 |
| US-004 | Warranty tracking feature | 2 | Medium | 300 | 03 | Sprint 3 |
| US-005 | Sales metrics dashboard | 3 | High | 400 | 01 | Sprint 2 |
| US-006 | AI-powered cross-sell recommendations | 3 | Medium | 200 | 04 | Sprint 4 |
| US-007 | Email campaign automation | 4 | High | 500 | 04 | Sprint 3 |
| US-008 | Multi-platform compatibility | 4 | High | 300 | 03 | Sprint 5 |
| US-009 | Role-based access control | 3 | High | 500 | 02 | Sprint 2 |
| US-010 | Complaint tracking and resolution | 4 | High | 300 | 01 | Sprint 3 |
| US-011 | Product catalogue integration | 4 | Medium | 200 | 03 | Sprint 4 |
| US-012 | Service appointment scheduling | 2 | Medium | 200 | 04 | Sprint 5 |
| US-013 | Integrate CRM with payment gateways | 2 | Medium | 200 | 02 | Sprint 5 |
| US-014 | Customer behaviour analytics | 4 | Medium | 200 | 01 | Sprint 4 |
| US-015 | Notifications and reminders | 3 | Medium | 300 | 04 | 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 | 1 | Developer 1 | In Progress | 01 |
|  | Integrate database for customer profiles | 2 | Developer 2 | To Do | 02 |
|  | Test customer profile functionality | 3 | QA Tester | To Do | 04 |
| US-002 | Search feature for customer profiles | 1 | Developer 3 | In Progress | 03 |
|  | Write test cases for search | 2 | QA Tester | To Do | 02 |
|  | Validate functionality with PO | 3 | Product Owner | To Do | 04 |
| US-009 | Role-based access control | 1 | Developer 4 | In Progress |  |
|  | Implement access logic | 2 | Developer 5 | To Do | 01 |
|  | Test role-based access | 3 | QA Tester | To Do | 03 |
| US-003 | Automate lead tracking and scoring | 4 | Developer 3 | In Progress | 02 |
|  | Integrate lead tracking with CRM UI | 2 | Developer 1 | To Do | 04 |
|  | Write test cases for lead tracking | 3 | QA Tester | To Do | 02 |
| US-005 | Sales metrics dashboard | 4 | Developer 4 | To Do | 03 |
|  | Integrate sales metrics API | 1 | Developer 2 | To Do | 01 |
|  | Validate metrics dashboard | 2 | Product Owner | To Do | 02 |
| US-004 | Warranty tracking feature | 3 | Developer 2 | In Progress | 02 |
|  | Create alerts for warranty expiry | 2 | Developer 5 | To Do | 03 |
|  | Write test cases for warranty tracking | 1 | QA Tester | To Do | 04 |
| US-010 | Complaint tracking and resolution | 1 | Developer 3 | To Do | 01 |
|  | Automate complaint notifications | 3 | Developer 1 | To Do | 03 |
|  | Test complaint tracking module | 4 | QA Tester | To Do | 02 |
| US-006 | AI-powered cross-sell recommendations | 1 | Developer 4 | To Do | 04 |
|  | Integrate recommendations in UI | 2 | Developer 3 | To Do | 01 |
|  | Validate AI recommendations | 4 | Product Owner | To Do | 02 |
| US-014 | Customer behaviour analytics | 3 | Developer 2 | To Do | 03 |
|  | Implement data visualization | 2 | Developer 5 | To Do | 02 |
|  | Test analytics dashboard | 1 | QA Tester | To Do | 02 |
| US-008 | Multi-platform compatibility | 1 | Developer 1 | To Do | 03 |
|  | Cross-browser testing | 3 | QA Tester | To Do | 04 |
|  | Fix compatibility issues | 2 | Developer 3 | To Do | 01 |
| US-013 | Integrate CRM with payment gateways | 1 | Developer 2 | To Do | 02 |
|  | Validate payment functionality | 4 | QA Tester | To Do | 03 |
| US-015 | Notifications and reminders | 3 | Developer 5 | To Do | 02 |

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**Document 6: Sprint meetings:**

**Meeting Type 1: Sprint planning meeting**

|  |  |
| --- | --- |
| **Details** | **Information** |
| **Date** | 06-01-2025 |
| **Time** | 11:00 AM |
| **Location** | PUNE |
| **Prepared By** | RAJESH KUMAR (Scrum Master) |
| **Attendees** | Scrum Master, Product Owner, Development Team, QA Team, Stakeholders (Optional) |

**Agenda Topics**

|  |  |  |
| --- | --- | --- |
| **Topic** | **Presenter** | **Time Allotted (Minutes)** |
| Review sprint goal and objectives | Scrum Master | 10 |
| Discuss priority user stories | Product Owner | 20 |
| Break down user stories into tasks | Development Team | 30 |
| Estimate effort for each task | Development Team & QA Team | 15 |
| Identify sprint dependencies | Scrum Master | 10 |
| Finalize sprint backlog | Scrum Master & Product Owner | 10 |
| Q&A and open discussion | All | 15 |

**Other Information:**

**Observers**

|  |  |
| --- | --- |
| Senior IT Manager | Mr. Rajesh Mehta |
| Sales Director | Ms. Priya Sharma |
| Customer Support Lead | Mr. Anil Kapoor |
| Marketing Manager | Ms. Sunita Rao |
| Legal Advisor | Mr. Aditya Sinha |
| Operations Manager | Mr. Vivek Joshi |
| UX/UI Specialist | Ms. Kavita Nair |
| Stakeholder Representative | Mr. Vinod Verma |

**Resources Required**

* + Sprint backlog document (digital or physical)
  + Access to project management tools (e.g., Jira)
  + Stakeholder-provided data or requirements (if applicable)
  + Development tools and reference documentation

**Special Notes**

* Ensure all attendees have access to the sprint backlog and required resources before the meeting.
* Record the meeting for absent team members.
* Focus on high-priority user stories to align with sprint objectives.
* Set realistic expectations for the sprint scope, considering team capacity and dependencies.

**Meeting Type 2: Sprint review meeting**

|  |  |
| --- | --- |
| **Details** | **Information** |
| **Date** | 08-01-2025 |
| **Time** | 11:00 AM |
| **Location** | PUNE |
| **Prepared By** | RAJESH KUMAR (Scrum Master) |
| **Attendees** | Scrum Master, Product Owner, Development Team, QA Team, Stakeholders (Optional) |

**Sprint Status**

* **Sprint Goal:** Complete the integration of the **Customer Profiles** feature and ensure the **Search Functionality** is fully operational.
* **Completed Items:**
  + **User Story US-001 (Customer Profiles):** Users can add, edit, and view customer profiles seamlessly.
  + **User Story US-002 (Search Functionality):** Basic search functionality is integrated, allowing search by customer name and email.
  + **User Story US-003 (Role-based Access Control):** Admin, Sales, and Support roles now have defined permissions within the CRM system.
* **Pending Items:**
  + **User Story US-004 (Lead Tracking):** Development was slightly delayed due to API integration issues with the lead scoring algorithm. Scheduled for the next sprint.

**Things to Demo**

1. **Customer Profiles Feature:**
   * Demonstrate adding and updating customer information like contact details, purchase history, and preferences.
2. **Search Functionality:**
   * Showcase the new search bar functionality that filters by customer name, email, and region.
3. **Role-based Access Control:**
   * Show the role assignment feature for admin, sales, and support staff, demonstrating restricted access based on user roles.
4. **Integration Progress:**
   * Provide a brief demo of the lead scoring algorithm, though incomplete, to showcase what has been implemented so far.

**Quick Updates**

* **Feedback from QA Testing:**
  + All completed features passed the unit tests, with minor UI fixes needed for the Customer Profiles form.
* **Challenges Faced:**
  + Encountered delays with the lead tracking feature due to issues integrating a third-party API for real-time lead data. The integration is in progress and expected to complete in the next sprint.
* **Stakeholder Feedback:**
  + The **Sales Director** has requested further customization for the Customer Profiles feature, specifically adding custom tags for leads and opportunities, which will be added to the backlog for future iterations.

**What’s next?**

* **Upcoming Sprint Goals:**
  + Focus on completing the **Lead Tracking Module**, ensuring the CRM can score leads based on predefined criteria.
  + Begin development of the **Sales Dashboard** to provide insights on customer behaviour and sales performance.
  + Refining **Customer Profiles** with additional fields requested by the sales team.
* **Dependencies:**
  + Awaiting API keys and documentation from the external provider for full lead tracking integration.
  + Coordination needed between the **Sales Team** and **UX/UI Designers** to finalize Customer Profile fields.
* **Action Items:**
  + Address feedback on **Customer Profiles** customization.
  + Re-prioritize the pending tasks from this sprint and add them to the **next sprint’s backlog**.
  + Prepare for the **Sprint Retrospective** to discuss process improvements for upcoming iterations.

**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** | Smitali (Business Analyst) |
| **Attendees** | Scrum Master, Product Owner, Development Team, QA Team, Stakeholders (Optional) |

**Agenda:**

|  |  |  |
| --- | --- | --- |
| **Topic** | **Presenter** | **Time Allotted (Minutes)** |
| Sprint goal and status update | Scrum Master | 10 |
| Demo of completed features | Development Team | 20 |
| Feedback and stakeholder input | Stakeholders | 30 |
| Challenges and pending items discussion | Scrum Master & Development | 15 |
| Next sprint preview | Scrum Master & Product Owner | 10 |
| Q&A and open discussion | All | 10 |

**What Went Well**

1. Successful implementation of **Customer Profiles** and **Search Features**.
2. Unit testing passed for all completed modules with minimal bugs.
3. Smooth collaboration between the development and QA teams.
4. Early resolution of technical dependencies related to the **Lead Tracking Module**.

**What Didn’t Go Well**

1. Delay in integrating third-party API due to incomplete documentation.
2. Minor misalignment in acceptance criteria for one user story, requiring additional iteration.
3. Time overrun during sprint tasks due to unforeseen complexity in role-based access implementation.

**Questions**

1. Can additional resources be allocated to resolve pending items in the next sprint?
2. Should the priority of incomplete tasks from this sprint be adjusted for upcoming iterations?
3. How can we ensure better clarity in acceptance criteria for future user stories?

**Reference**

* **Sprint Backlog:** [Link or reference document for the sprint backlog].
* **Demo Items:** [Link to deployed test environment or video recording of the demo].
* **Feedback Notes:** [Document or platform where feedback is recorded].

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

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

|  |  |  |  |
| --- | --- | --- | --- |
| **Day** | **What did you do yesterday?** | **What will you do today?** | **What (if any) is blocking your progress?** |
| **Monday** | **Developer 1**: Completed integration of Customer Profiles module. | **Developer 1**: Work on implementing search functionality. | **Developer 1**: No blockers. |
|  | **Developer 2**: Fixed issues with role-based access control. | **Developer 2**: Continue with role-based access testing. | **Developer 2**: API integration might cause a delay. |
|  | **Developer 3**: Completed unit tests for Customer Profiles. | **Developer 3**: Start preparing test cases for lead tracking. | **Developer 3**: Need clarification on test cases for Lead Tracking. |
| **Tuesday** | **Developer 1**: Integrated search bar functionality. | **Developer 1**: Work on completing filtering for search. | **Developer 1**: Awaiting design input for search results UI. |
|  | **Developer 2**: Continued testing of role-based access. | **Developer 2**: Finalize role-based access testing. | **Developer 2**: No blockers. |
|  | **Developer 3**: Worked on initial Lead Tracking module integration. | **Developer 3**: Continue developing Lead Tracking module. | **Developer 3**: Delay in API access for lead scoring. |
| **Wednesday** | **Developer 1**: Fixed UI bugs in the search functionality. | **Developer 1**: Review and adjust UI for customer profiles. | **Developer 1**: Need clarification on profile fields from Product Owner. |
|  | **Developer 2**: Completed testing for role-based access control. | **Developer 2**: Work on documentation for role access. | **Developer 2**: No blockers. |
|  | **Developer 3**: Worked with the team on the Lead Tracking module. | **Developer 3**: Start integrating external API for lead tracking. | **Developer 3**: API integration still pending. |
| **Thursday** | **Developer 1**: Began adjusting customer profile fields. | **Developer 1**: Continue adjustments on customer profiles UI. | **Developer 1**: Clarification on additional fields needed from sales. |
|  | **Developer 2**: Started preparing documentation for Access Control. | **Developer 2**: Finalize documentation for role access control. | **Developer 2**: No blockers. |
|  | **Developer 3**: Worked on integrating lead scoring API. | **Developer 3**: Continue API integration and validation. | **Developer 3**: API response format causing minor delays. |
| **Friday** | **Developer 1**: Completed customer profiles UI updates. | **Developer 1**: Review all updates and complete final testing. | **Developer 1**: No blockers. |
|  | **Developer 2**: Finalized role-based access documentation. | **Developer 2**: Provide final tests on role-based access. | **Developer 2**: No blockers. |
|  | **Developer 3**: Finalized API integration for lead tracking. | **Developer 3**: Start testing lead tracking functionality. | **Developer 3**: Need confirmation on test cases from QA. |