AGILE DOCUMENTS

Document 1: Definition of Done (DoD):

Definition of Done represents a set of criteria that must be met before considering any backlog item, user story, sprint, or release as "done." It ensures that our team delivers high-quality and valuable outcomes aligned with the project objectives of optimizing performance management within the organization.

Checklist for Definition of Done (DoD):

1. Code Quality and Implementation

- **Produced code for presumed functionalities:** All required functionalities of the user story have been implemented.
- **Assumptions of User Story met:** Assumptions outlined in the user story are addressed and validated.
- **Peer Code Review performed:** Code has been reviewed by at least one team member for quality and standards compliance.
- **Refactoring completed:** Code has been cleaned up and optimized for maintainability and performance.

2. Build and Test Readiness

- **Project builds without errors:** Code integrates with the existing system and builds successfully.
- **Unit tests written and passing:** Comprehensive unit tests are implemented, and all are passing.
- **Tests on devices/browsers listed in the project assumptions passed:** Compatibility tests performed on all required platforms.

3. Deployment and Testing

- **Project deployed on the test environment identical to production platform:** Deployed in an environment that mirrors production to identify potential issues.
- **Feature is tested against acceptance criteria:** Verified that the feature meets all specified acceptance criteria.
- **QA performed & issues resolved:** QA testing completed, and identified issues have been resolved.

4. Design and Product Approval

- **Feature ok-ed by UX designer:** UX designer has approved the implementation to ensure alignment with design guidelines.
- **Feature ok-ed by Product Owner:** Product Owner has reviewed and approved the feature.

5. Documentation and Configuration

- **Any configuration or build changes documented:** All necessary configuration changes have been noted and shared with relevant stakeholders.
- **Documentation updated:** Relevant documentation, including technical specifications and user manuals, is up-to-date.

Document 2- Product Vision

Scrum Project Name	AgileTech CRM Implementation
Venue	AgileTech Office
Date	March 15, 2024
Start Time	9:00 AM
End Time	11:00 AM
Duration	2 hours
Client	ABC Corporation
Stakeholder List	Parimal Smith (Product Owner)
	Emily Johnson (Scrum Master)
	David Brown (Development Lead)
	Lisa Miller (Quality Assurance Lead)

Scrum Master	Emily Johnson
Product Owner	John Smith
Scrum Developer 1	David Brown
Scrum Developer 2	Lisa Miller
Scrum Developer 3	Michael Wilson
Scrum Developer 4	Sarah Jones
Scrum Developer 5	Kevin Lee

Aspect	Details
Vision	To implement a robust, customer-focused CRM system that streamlines operations, enhances customer engagement, and drives business growth by enabling personalized experiences and efficient processes.
Target Group	**Market Segment:** Individuals and businesses seeking financial services, including loans, insurance, and investments. **Users:** Employees in sales, customer support, and marketing. **Customers:** Loan applicants, existing borrowers, and financial advisors.
Needs	**Problems Addressed:** - Fragmented customer data. - Delays in customer service response. - Lack of personalized communication. **Benefits Provided:** - Centralized platform for customer interactions. - Real-time customer journey tracking. - Data-driven decision-making.
Product	**Type:** Customized CRM platform integrated with existing systems. **Special Features:** - 360-degree customer view. - AI-driven cross-sell/up-sell recommendations. - Seamless integration with loan management and analytics tools. **Feasibility:** Proven technical readiness, resource availability, and partnerships with CRM vendors.
Value	**Benefits to Company:** - Increased customer retention through personalization. - Improved operational efficiency with automation. - Higher revenue via targeted marketing and effective cross-selling. **Business Goals:** - Enhance NPS by 20%. - Reduce resolution time by 30%. - Drive 15% increase in sales conversion rates within the first year. **Business Model:** - Value from improved customer retention and acquisition. - Operational efficiency via automated lead management and marketing campaigns.

Document 3: User stories

User Story No	Tasks	Priority	Value Statement	BV	CP	Acceptance Criteria
CRM-US-001	Capture new lead, Create lead entry, Assign lead to salesperson	High	As a Salesperson, I want to capture new leads in the CRM, so that I can follow up with them to convert into customers.	Increased sales opportunities	Manual lead tracking is error-prone	1. Lead is successfully added to the CRM. 2. Lead is assigned to the appropriate salesperson. 3. Salesperson receives notification about new lead.
CRM-US-002	Create customer profile, Populate customer details	High	As a CRM User, I want to create a comprehensive customer profile, so that I can store all relevant customer information in one place.	Centralized data for better decision-making	Fragmented customer data	1. All mandatory fields are populated. 2. Profile is saved in CRM without errors. 3. Customer information can be easily updated.
CRM-US-003	Record customer interaction, Log call and meeting details	High	As a Sales Representative, I want to log every customer interaction, so that I have a complete record of conversations for future reference.	Better customer service and follow-up	Incomplete records of past interactions	1. Interaction logs are created after every call/meeting. 2. Interaction history is easily accessible.
CRM-US-004	Set reminders, Configure notification alerts	Medium	As a Salesperson, I want to set reminders for follow-ups, so that I never miss an important action item.	Improved sales conversion rates	Missed follow-up opportunities	1. Reminder is set with the correct time and date. 2. Notification is received at the appropriate time.
CRM-US-005	Generate lead reports, Filter leads by status	High	As a Sales Manager, I want to generate lead reports, so that I can track the progress of leads and measure team performance.	Improved lead tracking	Lack of visibility into lead status	1. Report is generated for leads within a specified time period. 2. Leads can be filtered by status (e.g., New, In Progress, Closed).

User Story No	Tasks	Priority	Value Statement	BV	CP	Acceptance Criteria
CRM-US-006	Import contacts, Validate imported data	Medium	As a CRM User, I want to import contacts from an external source, so that I can quickly integrate them into the system.	Faster data entry	Manual data entry is time-consuming	1. Contacts are imported successfully without data corruption. 2. Errors in the imported data are flagged for review.
CRM-US-007	Send email to lead, Create template for email	High	As a Marketing User, I want to send emails to leads, so that I can engage them with relevant information.	Increased lead engagement	Manual email sending is inefficient	1. Email template is created and can be selected for use. 2. Email is successfully sent to the lead.
CRM-US-008	Create workflow, Define actions in workflow	Medium	As an Admin, I want to create workflows for various processes, so that repetitive tasks are automated and errors are minimized.	Time savings and process consistency	Manual processes are error-prone	1. Workflow is created with defined steps. 2. Workflow automates actions as per configuration.
CRM-US-009	Track customer purchase history, Display recent transactions	High	As a Sales Representative, I want to track the customer's purchase history, so that I can recommend relevant products based on past purchases.	Increased cross-selling and upselling opportunities	Limited customer context for recommendations	1. Customer's purchase history is displayed. 2. Salesperson can filter recent transactions by date.
CRM-US-010	Update customer profile, Add new communication preferences	Medium	As a Customer Support Agent, I want to update customer profiles with new communication preferences, so that we can reach out to them through their preferred channels.	Improved customer satisfaction	Customers being contacted through unwanted channels	1. Communication preferences are updated successfully. 2. Preferences are applied during outreach.
CRM-US-011	Create opportunity, Assign opportunity to salesperson	High	As a Sales Manager, I want to create sales opportunities, so that my team can track and work on potential deals.	Increased revenue and focus on high-potential leads	Lack of focus on important opportunities	1. Opportunity is successfully created. 2. Opportunity is assigned to the appropriate salesperson.

User Story No	Tasks	Priority	Value Statement	BV	CP	Acceptance Criteria
CRM-US-012	Monitor sales funnel, Generate funnel report	High	As a Sales Manager, I want to monitor the sales funnel, so that I can identify bottlenecks and take corrective actions.	Increased efficiency and conversion rates	Lack of visibility into sales pipeline	1. Funnel stages are clearly defined. 2. Report can be generated and filtered by stage.
CRM-US-013	Track customer support cases, Update case status	High	As a Customer Support Agent, I want to track the status of customer cases, so that I can ensure they are resolved in a timely manner.	Improved customer experience	Support cases being delayed or unresolved	1. Case status can be updated and tracked. 2. Case status is reflected in the system in real-time.
CRM-US-014	Integrate CRM with external tools, Configure integration settings	High	As an Admin, I want to integrate the CRM with external tools (e.g., email marketing software), so that data is synchronized across systems.	Streamlined operations and data accuracy	Data duplication and manual synchronization	1. Integration with external tools is successfully established. 2. Data is synchronized without errors.
CRM-US-015	Segment customers, Define customer groups	Medium	As a Marketing User, I want to segment customers into groups, so that I can send targeted communications to the right audience.	Improved marketing effectiveness	Generic communications reaching the wrong audience	1. Customers can be grouped based on defined criteria. 2. Groups can be used to send targeted messages.
CRM-US-016	Configure custom fields, Add new data fields for customer profiles	Medium	As an Admin, I want to configure custom fields in the CRM, so that I can capture additional customer information specific to our business.	Enhanced data collection	Incomplete customer profiles	1. Custom fields are created and appear in customer profiles. 2. Data can be entered in the new fields.
CRM-US-017	Schedule demo, Set date and time for demo	Medium	As a Sales Representative, I want to schedule product demos with customers, so that I can showcase the product’s features and benefits.	Increased customer engagement and conversion	Missed demo opportunities	1. Demo is scheduled with the correct date and time. 2. Customer receives confirmation of the demo.

User Story No	Tasks	Priority	Value Statement	BV	CP	Acceptance Criteria
CRM-US-018	Filter customers by region, Display region-specific data	Medium	As a Sales Manager, I want to filter customers by region, so that I can analyze sales performance in specific areas.	Improved sales strategy by region	Inability to analyze data based on region	1. Customers can be filtered by region. 2. Regional data is displayed correctly.
CRM-US-019	Add notes to customer profile, Enter important customer details	Low	As a CRM User, I want to add notes to customer profiles, so that I can document key information and insights.	Enhanced customer context	Lack of record for key customer interactions	1. Notes can be added and saved in the profile. 2. Notes are accessible by all relevant users.
CRM-US-020	Send automated reminders, Set time intervals for reminders	Medium	As a Marketing User, I want to send automated reminders to customers, so that I can encourage them to complete actions like payments or renewals.	Increased customer retention	Lack of timely follow-up	1. Reminders are automatically sent at the defined interval. 2. Customer receives a notification as per their preference.

User Story No	Tasks	Priority	Value Statement	BV	CP	Acceptance Criteria
CRM-US-021	Create tasks for follow-up, Assign tasks to team members	Medium	As a Sales Manager, I want to create tasks for follow-ups, so that the team stays on top of important actions.	Improved team productivity	Lack of task assignment and tracking	1. Task is created and assigned to team member. 2. Task appears in the team member's task list.
CRM-US-022	Track customer satisfaction, Record survey responses	Medium	As a Customer Support Manager, I want to track customer satisfaction, so that I can measure the success of our support services.	Improved customer service	Lack of feedback on customer satisfaction	1. Customer satisfaction survey is completed. 2. Responses are recorded in CRM.
CRM-US-023	Sync data with marketing tool, Update leads in real-time	High	As an Admin, I want to sync CRM with marketing tools, so that	Timely data updates	Delayed marketing campaigns due to outdated data	1. Data sync is successful without errors. 2. Leads are updated in

User Story No	Tasks	Priority	Value Statement	BV	CP	Acceptance Criteria
			marketing campaigns are based on the latest lead data.			real-time.
CRM-US-024	Assign lead scores, Define lead qualification criteria	Medium	As a Sales Manager, I want to assign lead scores based on qualification criteria, so that the team can prioritize high-quality leads.	Improved lead prioritization	Low-quality leads being worked on first	1. Leads are scored based on defined criteria. 2. Leads are prioritized accordingly.
CRM-US-025	Create and track campaigns, Define target audience	Medium	As a Marketing User, I want to create and track marketing campaigns, so that I can assess their effectiveness.	Increased marketing effectiveness	Inability to measure campaign success	1. Campaign is successfully created. 2. Target audience is defined. 3. Campaign performance can be tracked.
CRM-US-026	Add customer tags, Categorize customers by behavior	Medium	As a Sales Representative, I want to tag customers based on behavior (e.g., active, dormant), so that I can tailor my outreach strategy.	Better customer segmentation	Lack of categorization leading to generic outreach	1. Customers can be tagged based on behavior. 2. Tags are visible in customer profiles.
CRM-US-027	Generate custom reports, Export report to Excel	Medium	As a Sales Manager, I want to generate custom reports, so that I can analyze specific data sets and export them for further analysis.	Data-driven decision-making	Lack of flexibility in reporting tools	1. Report is generated based on custom parameters. 2. Report can be exported to Excel.
CRM-US-028	Add custom workflows for support team, Automate case handling process	High	As a Customer Support Manager, I want to create custom workflows, so that the team can handle support cases more efficiently.	Faster case resolution	Manual case handling processes	1. Custom workflow is created for support cases. 2. Workflow automates case handling.
CRM-US-029	Update lead status, Automatically notify sales	High	As a Sales Representative, I want the system to	Improved team collaboration	Lack of notification about lead status changes	1. Lead status updates automatically. 2. Relevant

User Story No	Tasks	Priority	Value Statement	BV	CP	Acceptance Criteria
	team		automatically update the lead status and notify the relevant team members.			team members are notified.
CRM-US-030	Schedule and manage appointments, Set up reminders	Medium	As a Sales Representative, I want to schedule and manage appointments with customers, so that I can keep track of upcoming meetings.	Improved scheduling efficiency	Missed appointments and scheduling errors	1. Appointment is scheduled correctly. 2. Reminder is sent to both parties.
CRM-US-031	Track sales performance, Compare performance across periods	High	As a Sales Manager, I want to track sales performance, so that I can compare performance across different periods and identify trends.	Data-driven sales strategy	Inability to track performance trends	1. Sales performance is tracked by period. 2. Performance data is displayed for comparison.
CRM-US-032	Sync with payment systems, Update payment status in CRM	High	As a Customer Support Agent, I want the CRM to sync with payment systems, so that I can see the latest payment status without manual updates.	Streamlined payment tracking	Manual payment status updates	1. Payment status is updated automatically. 2. Payment status is visible in the customer profile.
CRM-US-033	Create service tickets, Assign to support agents	Medium	As a Customer Support Agent, I want to create service tickets, so that I can assign issues to the right support agents for resolution.	Faster issue resolution	Unassigned or delayed issues	1. Service ticket is created and assigned to an agent. 2. Ticket is visible in the agent's dashboard.
CRM-US-034	Record customer feedback, Categorize feedback types	Medium	As a Marketing User, I want to record customer feedback, so that I can categorize and analyze it to improve services.	Improved customer experience	Limited insights from customer feedback	1. Customer feedback is recorded and categorized. 2. Feedback is analyzed for trends.
CRM-US-035	Track customer interactions across	High	As a Customer Support Manager, I	Unified customer experience	Disjointed support experience	1. Interactions from all channels are

User Story No	Tasks	Priority	Value Statement	BV	CP	Acceptance Criteria
	channels, Integrate communication channels		want to track customer interactions across multiple channels (email, chat, phone), so that I can provide cohesive support.		across channels	logged. 2. Interactions are visible in the customer profile.
CRM-US-036	Add product catalog to CRM, Link products to opportunities	Medium	As a Sales Representative, I want to add products to the CRM and link them to sales opportunities, so that I can offer relevant products to leads.	Improved sales effectiveness	Lack of product context in sales conversations	1. Product catalog is accessible from CRM. 2. Products are linked to opportunities.
CRM-US-037	Set custom user roles, Assign permissions based on roles	Medium	As an Admin, I want to define custom user roles and assign permissions, so that each team member has access to only the necessary information.	Data security and access control	Unauthorized access to sensitive data	1. Custom roles are defined and assigned. 2. Permissions are correctly applied to users.
CRM-US-038	Track customer lifecycle stages, Display lifecycle stage in CRM	Medium	As a Sales Manager, I want to track the lifecycle stages of customers, so that I can adjust my sales approach based on where the customer is.	Improved sales targeting	Lack of visibility into customer lifecycle	1. Lifecycle stages are clearly defined. 2. Lifecycle stage is visible in customer profiles.
CRM-US-039	Automate data backups, Schedule regular backups	Low	As an Admin, I want to automate CRM data backups, so that data is regularly saved without manual intervention.	Improved data security	Risk of data loss due to manual backup processes	1. Backups are scheduled and occur automatically. 2. Backup status is logged for review.
CRM-US-040	Generate customer retention reports, Track churn rates	Medium	As a Marketing User, I want to generate customer retention reports, so that I can track churn rates and implement retention	Improved customer retention	Lack of visibility into customer churn	1. Customer retention report is generated. 2. Churn rates are tracked and displayed.

User Story No	Tasks	Priority	Value Statement	BV	CP	Acceptance Criteria
			strategies.			

Document 4: Agile PO Experience

The Product Owner (PO) plays a pivotal role in driving the success of a project by envisioning the product based on domain/industry experience and market needs. The responsibilities of a PO in a project encompass various crucial tasks:

Market Analysis:

- Analyzing market needs and demands
- Assessing the availability of similar products in the market

Enterprise Analysis:

- Conducting due diligence on the market opportunity.

Product Vision and Roadmap:

- Crafting a product vision aligned with the needs analysis
- Developing a product roadmap outlining high-level features and timeline

Managing Product Features:

- Addressing stakeholder expectations and prioritizing needs
- Prioritizing epics, stories, and features based on criticality and ROI considerations

Managing Product Backlog:

- Prioritizing user stories
- Reprioritizing based on stakeholder feedback
- Planning epics

Managing Overall Iteration Progress:

- Reviewing sprint progress
- Adjusting sprint and epic priorities as necessary
- Conducting sprint retrospectives with Business Analysts

Through my experience in this project, I have gained valuable insights into facilitating various sprint meetings, including:

- Sprint planning meetings
- Daily scrum meetings
- Sprint review meetings
- Sprint retrospective meetings
- Backlog refinement meetings

Additionally, I have learned the intricacies of crafting user stories, which include:

- Assigning a unique story number
- Defining specific tasks
- Establishing priority levels
- Outlining acceptance criteria
- Identifying business value (BV) and complexity points (CP)
- In Scrum, a product owner serves as the liaison between multiple areas of an organization. This person communicates with business stakeholders and collaborates closely with Scrum teams to keep all areas of the business informed on a project's development.
- The product owner develops a vision of a product's function and operation, which in turn allows this Scrum team member to define product features and break those features into product backlog items.

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

ID	User Story	Tasks	Priority	BV	CP	Sprint
PB-001	As a Salesperson, I want to capture new leads, so I can follow up with them.	Capture new lead, Create lead entry	High	Increased sales opportunities	Manual lead tracking is error-prone	Sprint 1
PB-002	As a CRM User, I want to create a customer profile to store relevant information.	Create customer profile, Populate details	High	Centralized data for decisions	Fragmented customer data	Sprint 1
PB-	As a Sales	Record	High	Better follow-up	Incomplete records	Sprint 1

ID	User Story	Tasks	Priority	BV	CP	Sprint
003	Representative, I want to log customer interactions to track them.	interactions, Log calls/meetings		and customer service	of past interactions	
PB-004	As a Salesperson, I want reminders for follow-ups, so I don't miss any actions.	Set reminders, Configure notifications	Medium	Improved conversion rates	Missed follow-ups	Sprint 2
PB-005	As a Sales Manager, I want to generate lead reports to track progress.	Generate lead report, Filter by status	High	Better lead tracking	Lack of visibility into lead status	Sprint 2
PB-006	As a CRM User, I want to import contacts, so they are in the system.	Import contacts, Validate data	Medium	Faster data entry	Manual data entry is time-consuming	Sprint 3
PB-007	As a Marketing User, I want to send emails to leads to engage them.	Send email, Create template	High	Increased engagement	Inefficient email sending	Sprint 3
PB-008	As an Admin, I want to create workflows to automate processes.	Define workflow, Set actions	Medium	Time-saving, fewer errors	Manual processes	Sprint 4
PB-009	As a Sales Rep, I want to track customer purchase history for relevant offers.	Track purchase history, Display transactions	High	Increased cross-selling	Lack of context for recommendations	Sprint 4
PB-010	As a Support Agent, I want to update customer profiles with communication preferences.	Update customer profile, Add preferences	Medium	Improved service satisfaction	Customers contacted through unwanted channels	Sprint 5
PB-011	As a Sales Manager, I want to create opportunities for tracking deals.	Create opportunity, Assign salesperson	High	Improved sales forecasting	Lack of focus on key opportunities	Sprint 5
PB-012	As a Sales Manager, I want to monitor the sales funnel to identify bottlenecks.	Monitor funnel, Generate report	High	Better performance management	Lack of visibility into the sales pipeline	Sprint 6
PB-013	As a Support Agent, I want to track the status of cases to ensure timely resolution.	Track case, Update status	High	Improved case resolution	Delayed or unresolved cases	Sprint 6
PB-014	As an Admin, I want to integrate CRM with external tools for seamless data sync.	Integrate with email marketing tool	High	Streamlined operations	Manual sync errors	Sprint 7
PB-015	As a Marketing User, I want to segment customers for targeted campaigns.	Define customer groups, Segment customers	Medium	Improved campaign targeting	Generic outreach campaigns	Sprint 7
PB-016	As an Admin, I want to configure custom fields to capture business-specific data.	Add custom fields, Set configurations	Medium	Enhanced data collection	Missing business-specific data	Sprint 8
PB-017	As a Sales Rep, I want to schedule product demos with customers.	Schedule demo, Set date/time for demo	Medium	Increased engagement	Missed demo opportunities	Sprint 8
PB-	As a Sales Manager, I	Filter by region,	Medium	Better targeted	Lack of regional	Sprint 9

ID	User Story	Tasks	Priority	BV	CP	Sprint
018	want to filter customers by region for performance analysis.	Show regional data		strategies	insights	
PB-019	As a CRM User, I want to add notes to customer profiles for key insights.	Add notes, Enter key details	Low	Improved customer context	No record for key insights	Sprint 9
PB-020	As a Marketing User, I want to send automated reminders to customers for actions like payments.	Send reminders, Set intervals	Medium	Improved retention rates	Lack of timely follow-up	Sprint 10
PB-021	As a Sales Manager, I want to assign tasks for follow-ups.	Assign tasks, Create follow-up reminders	Medium	Improved team collaboration	Missed follow-up tasks	Sprint 10
PB-022	As a Customer Support Manager, I want to track customer satisfaction scores.	Record satisfaction, Generate reports	Medium	Increased customer satisfaction	Lack of feedback data	Sprint 11
PB-023	As an Admin, I want to sync CRM with marketing tools to maintain real-time data.	Sync data, Update leads	High	Data consistency and accuracy	Outdated data from disconnected systems	Sprint 11
PB-024	As a Sales Manager, I want to score leads based on qualification criteria.	Score leads, Define criteria	Medium	Improved lead prioritization	Low-quality leads prioritized	Sprint 12
PB-025	As a Marketing User, I want to create and track marketing campaigns.	Create campaign, Define target audience	Medium	Increased marketing effectiveness	Untracked campaign performance	Sprint 12
PB-026	As a Support Agent, I want to add service tickets for unresolved cases.	Add tickets, Assign agents	Medium	Faster issue resolution	Delayed response time	Sprint 13
PB-027	As a Sales Rep, I want to sync CRM with payment systems for real-time updates.	Sync payments, Update payment status	High	Timely payment tracking	Manual payment tracking	Sprint 13
PB-028	As an Admin, I want to automate data backups for system security.	Automate backups, Schedule backups	Low	Enhanced data security	Risk of data loss	Sprint 14
PB-029	As a Marketing User, I want to track customer retention rates for future strategies.	Track retention, Generate churn reports	Medium	Improved retention efforts	Lack of retention insights	Sprint 14
PB-030	As a Sales Representative, I want to view customer lifecycle stages to tailor my sales approach.	Track lifecycle stages, Show in CRM	Medium	Better-targeted sales outreach	Limited visibility into customer journey	Sprint 15
PB-031	As a CRM User, I want to create and update custom workflows for team tasks.	Create workflows, Assign tasks	Medium	More efficient workflow processes	Manual task management	Sprint 15
PB-032	As a Sales Manager, I want to set alerts for lead status changes.	Set alerts, Notify sales team	Medium	Faster response to lead changes	Missed or delayed alerts	Sprint 16

ID	User Story	Tasks	Priority	BV	CP	Sprint
PB-033	As a Marketing User, I want to segment customers by behavior for targeted messaging.	Segment by behavior, Define categories	High	Increased engagement	Generic campaigns	Sprint 16
PB-034	As an Admin, I want to define user roles and permissions for better access control.	Set user roles, Assign permissions	High	Better security and access control	Unauthorized data access	Sprint 17
PB-035	As a Sales Representative, I want to track product preferences based on customer behavior.	Track product preferences, Record customer data	High	Increased upselling opportunities	Lack of tailored product recommendations	Sprint 17
PB-036	As a Marketing User, I want to monitor the success of email campaigns.	Monitor campaign success, Generate report	Medium	Optimized marketing efforts	Low visibility into email performance	Sprint 18
PB-037	As a Sales Manager, I want to track revenue generation against targets.	Track revenue, Set targets	High	Increased sales performance	Inability to track progress towards targets	Sprint 18
PB-038	As a Sales Manager, I want to track team performance against targets.	Track team performance, Compare results	Medium	Improved team performance	Lack of performance tracking	Sprint 19
PB-039	As a CRM User, I want to track customer service levels across different channels.	Monitor service levels, Log channel interactions	Medium	Improved customer experience	Fragmented customer service data	Sprint 19
PB-040	As a Sales Rep, I want to access a product catalog from CRM for product recommendations.	Access product catalog, Link to CRM	High	Increased cross-selling potential	Difficulty in recommending relevant products	Sprint 20

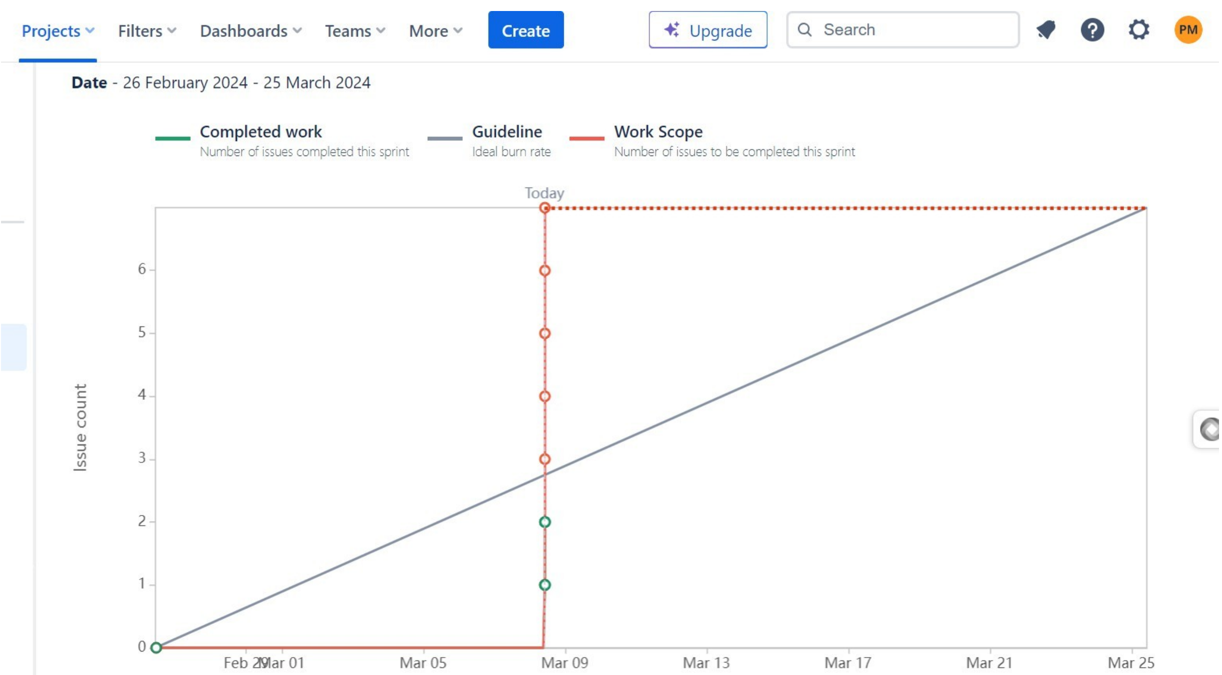
Sprint Backlog

Here's a **Sprint Backlog** based on the above **Product Backlog** entries. Tasks are assigned to specific sprints:

ID	Task	Sprint
Sprint-01	Capture new lead, Create lead entry	Sprint 1
Sprint-01	Create customer profile, Populate details	Sprint 1
Sprint-01	Record interactions, Log calls/meetings	Sprint 1
Sprint-02	Set reminders, Configure notifications	Sprint 2
Sprint-02	Generate lead report, Filter by status	Sprint 2
Sprint-03	Import contacts, Validate data	Sprint 3
Sprint-03	Send email, Create template	Sprint 3
Sprint-04	Define workflow, Set actions	Sprint 4
Sprint-04	Track purchase history, Display transactions	Sprint 4
Sprint-05	Update customer profile, Add preferences	Sprint 5
Sprint-05	Create opportunity, Assign salesperson	Sprint 5
Sprint-06	Monitor funnel, Generate report	Sprint 6

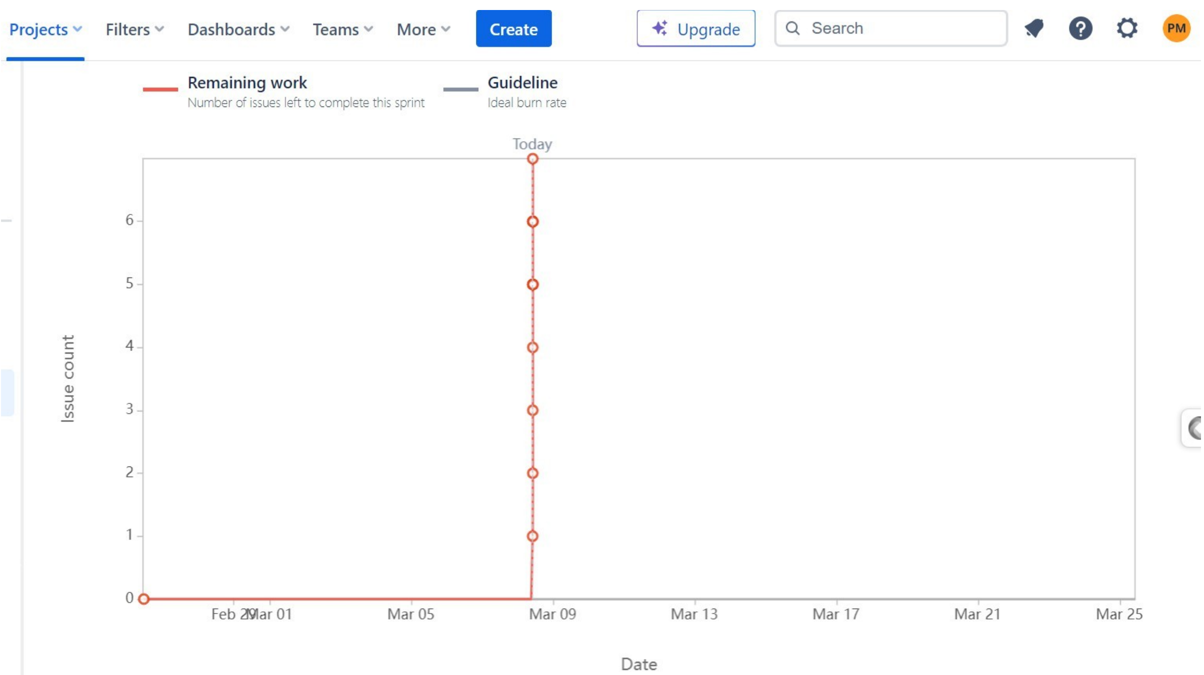
ID	Task	Sprint
Sprint-06	Track case, Update status	Sprint 6
Sprint-07	Integrate with email marketing tool	Sprint 7
Sprint-07	Define customer groups, Segment customers	Sprint 7

Sprint Burndown Chart												
Backlog ID	User Stories	Initial Estimate	10-Mar	11-Mar	12-Mar	13-Mar	16-Mar	17-Mar	18-Mar	19-Mar	20-Mar	21-Mar
		Day 0	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8	Day 9	Day 10
223	Feature 1	6			1			1				
224	Feature 2	4	2		2		5	1		-3		
225	Feature 3	8				1			4		3	
226	Feature 4	3				2						2
227	Feature 5	9			3			1				
Remaining Effort		30	28	28	22	19	14	11	7	10	7	5
Ideal Trend		30	27	24	21	18	15	12	9	6	3	0



Product Burndown Chart												
Backlog ID	User Stories	Initial Estimate	20-Aug	21-Aug	22-Aug	23-Aug	24-Aug	25-Aug	26-Aug	27-Aug	28-Aug	29-Aug

		Day 0	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8	Day 9	Day 10
111	Feature 1	2						1				
112	Feature 2	4	1				2	1		-1		
113	Feature 3	1				1			4		1	
114	Feature 4	3				1					1	1
115	Feature 5	6			2			1				
Remaining Effort		16	15	15	13	11	9	6	2	3	1	0
Ideal Trend		16	14.4	12.8	11.2	9.6	8	6.4	4.8	3.2	1.6	0



Topic	Presenter	Time allotted
Sprint Review	John	30 minutes
Backlog Refinement	Sarah	20 minutes
Sprint Planning	Alice	40 minutes

Other Information

Observers	Resources	Special Notes
Marketing Team	Projector	N/A
HR Department	Whiteboard	Ensure all HR-related decisions are documented.

Quality Assurance	Flip charts	Record all identified defects and their resolutions.
Operations Team	Laptop	Ensure operational processes are clearly outlined.
Finance Department	Printer	Keep track of budget allocations and expenditures.

Sprint review meeting

Date	2024-04-20
Time	10:00AM
Location	Conference Room A
Prepared By	Parimal Maldhure
Attendees	Development Team, Product Owner, Stakeholders

Sprint status	**Things to demo**	**Quick updates**	**What's next**
Completed all user stories.	New dashboard feature, Updated UI components	Completed backend integration, Resolved bugs	Plan next sprint, Review feedback from stakeholders

Sprint retrospective meeting

Date	2024-04-23
Time	10:00AM
Location	Conference Room A
Prepared By	Anshu Pal
Attendees	Scrum Master, Development Team

Agenda	What went well	What didn't go well	Questions	Reference
Review backlog	Completed all user stories	Delay in QA testing	When can QA start testing?	Sprint 3
Demo new features	Positive feedback from stakeholders	Issues with integration	How can we improve integration?	Sprint 3
Discuss next sprint goals	Clear understanding of next steps	Scope creep observed	How can we manage scope better?	Sprint 3

Daily Stand-up meeting

Question	Name/Role	Week
What did you do yesterday?	Developer 1 (Parimal)	Monday: Worked on implementing user authentication feature.
	Developer 2 (Jane Smith)	Monday: Fixed a bug related to database connectivity.
	Developer 3 (Michael Lee)	Monday: Reviewed pull requests and provided feedback.
What will you do today?	Developer 1 (Parimal)	Tuesday: Continue working on user authentication.
	Developer 2 (Jane Smith)	Tuesday: Start working on frontend UI enhancements.
	Developer 3 (Michael Lee)	Tuesday: Conduct code refactoring for performance optimization.
What (if any) is blocking your progress?	Developer 1 (Parimal)	Wednesday: Waiting for approval on design changes.
	Developer 2 (Jane Smith)	Wednesday: Need clarification on UI/UX requirements.
	Developer 3 (Michael Lee)	Wednesday: Facing technical issues with third-party library integration.