Scenario

Northwind Technologies, a growing software development company, faces several challenges. As the company expands, its sales team struggls with managing increasing customer interactions and sales opportunities using outdated methods like spreadsheets and manual record-keeping.

This lack of an integrated system results in several critical issues:

- Sales representatives find maintaining accurate and up-to-date customer information difficult without a centralized database. It often leads to duplicate records and lost opportunities.
- The absence of a streamlined process for tracking sales opportunities causes delays in the sales cycle, making it hard for the team to prioritize leads and close deals efficiently.
- Managers lack access to real-time sales data, making it challenging to assess team performance, identify trends, and make informed decisions.
- Manual tracking of follow-up tasks leads to inconsistent customer engagement, which affects customer satisfaction and retention rates.
- The sales team uses multiple disconnected tools for communication and scheduling, leading to inefficiencies and missed opportunities for collaboration.

To address these challenges and support its growth objectives, Northwind Technologies has decided to implement a CRM system tailored to its specific needs. The goal is to provide the sales team with the ability to manage customer relationships, streamline sales processes, and monitor the sales process through advanced reporting and analytics.

As the need for a CRM system becomes apparent, Emily Johnson, Director of Sales Operations, and Michael Lee, Head of IT, assemble a project team with relevant experience and expertise in CRM development and Agile project management.

Scrum Team

- Product Owner: Sarah Thompson (Roadmap, Epics, Product Vision, Business Value)
- Scrum Master: David Kim (Scrum Ceremonies, provides support to the Scrum Team)
- Business Analyst: Tom Brown (User Stories and UAT)
- UX/UI Designer: Rachel Green (User Interface and interaction design)
- Frontend Developer: Lisa Chen (User Interface development and handling client-side logic such as user interaction, data validation, and rendering data)
- Backend Developer: Mark Wilson (Server-side development, database management, security and authentication)
- QA Engineer: Alex Martinez (Testing)

The team conducts interviews and workshops with sales representatives, managers, and other stakeholders to gather insights into their challenges and requirements.

Sarah, the Product Owner, identifies the following product features:

1. **Contact Management**

This feature allows sales representatives to easily manage customer contacts.

Requirements:

REQ_01	Enable sales representatives to list, view, add, edit, and delete customer contacts. Contact details must include customer name, company name, email, phone, **and** additional details.
REQ_02	Allow users to import and export contact lists.

2. Sales Opportunity Tracking

This feature allows users to track sales opportunities and update their status.

Requirements:

REQ_03	Implement functionality for users to create and update sales opportunities.
REQ_04	Implement dashboard analytics to track opportunities through different stages of the sales cycle.

3. Reporting and Analytics

This feature allows sales managers to gain insights into team performance and customer interactions.

Requirements:

REQ_05	Generate reports on sales performance.
REQ_06	Provide dashboard analytics to visualize sales data.

4. Integration and Automation

This feature enables automated reminders to sales staff about appointments and tasks.

Requirements:

REQ_07	Integrate the CRM with the calendar and email system.
REQ_08	Automate reminders and follow-up tasks for sales representatives.

5. System Performance Requirements

These requirements describe general system performance.

REQ_09	The system should be able to handle at least 500 concurrent users without any degradation in performance.
REQ_10	Page load times for any CRM feature must not exceed 3 seconds under normal network conditions.

Project Roadmap

As a result of a collaborative process involving input from the stakeholders, the Scrum team, and end-users, the Product Owner develops the project roadmap.

The roadmap is divided into phases to ensure a manageable and iterative development process. Each phase focuses on delivering specific functionality that provides immediate value to the sales team.

The Scrum team agrees to work in 2-week sprints.

ID	Phase/Milestone	Duration
1	**Contact Management**: Sales representatives can manage customer contacts easily.	2 Sprints
2	**Sales Opportunity Tracking:** Users can track sales opportunities and update their status.	1 Sprints
3	**Reporting and Analytics:** Sales managers can gain insights into team performance and customer interactions.	3 Sprints
4	**Integration and Automation:** CRM integrates with Outlook email & calendar, sales staff receive automated reminders about meetings and tasks	2 Sprints
	Total Project Duration	**8 Sprints**

Tasks

1. Write high-level User Stories (Epics) that describe each product feature.
2. Split the Contact Management Epics into low-level User Stories.
3. Based on the user stories and the roadmap, create a Gantt chart for this project.
4. Create a traceability matrix mapping requirements to User Stories.