

PROJECT PLANNING PHASE

Date	16th June 2025
Team ID	LTVIP2025TMID29987
Project Name	CRM Application for Jewelry Management – (Developer)
Maximum Marks	

Agile Planning Overview

Agile methodology promotes incremental delivery through iterative cycles known as **Sprints**. Each Sprint involves:

- **Product Backlog:** A list of all desired features (Epics & Stories).
- **Sprint Backlog:** User stories selected for a particular sprint.
- **Story Points:** Units representing complexity/effort.
- **Velocity:** Average number of story points a team completes per sprint.
- **Burndown Chart:** Visual progress of task completion over time.

Product Backlog, Sprint Schedule, and Estimation (4 Marks)

Sprint	Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points	Priority	Team Members
Sprint-1	Registration	USN-1	As a user, I can register for the system by entering my email, password, and confirming my password.	2	High	Member 1
Sprint-1	Registration	USN-2	As a user, I will receive a confirmation email after registration.	1	High	Member 2
Sprint-1	Registration	USN-4	As a user, I can register through Gmail login integration.	2	Medium	Member 3
Sprint-1	Login	USN-5	As a user, I can log into the system with my credentials.	1	High	Member 4
Sprint-	Dashboard Setup	USN-6	As a user, I can view a dashboard showing orders	4	High	Member 1

1			and billing details.			
Sprint-2	Order Management	USN-7	As a customer, I can place an order for a selected ornament.	3	High	Member 2
Sprint-2	Billing Automation	USN-8	As an admin, I can generate a billing record with calculated amount, KDM charges, and taxes.	5	High	Member 3
Sprint-2	Payment Handling	USN-9	As a system, I can auto-update the paid amount once payment is done.	2	High	Member 4
Sprint-2	Communication	USN-10	As a customer, I will receive an email notification upon successful billing.	3	High	Member 2

Project Tracker, Velocity & Burndown Chart (4 Marks)

Sprint	Total Story Points	Duration	Sprint Start Date	Sprint End Date (Planned)	Story Points Completed (on Planned End Date)	Sprint Release Date (Actual)
Sprint-1	10	5 Days	16th June 2025	21th June 2025	10	23rd June 2025
Sprint-2	13	5 Days	22nd June 2025	26th June 2025	13	28th June 2025

Velocity Calculation

- **Total Story Points:** 10 (Sprint 1) + 13 (Sprint 2) = **23**
- **Total Sprints:** 2
- **Velocity (Story Points per Sprint):** $23 / 2 = 11.5 \approx 12$

Burndown Chart (Conceptual)

A **Burndown Chart** visually shows how the team is progressing through the project, tracking **work remaining** vs. **days in sprint**. Here's a rough reference structure:

Sprint 1 – 5 Day Burndown

◆ Ideal vs. Actual Progress (Sprint-2 Sample):

Day	Remaining Story Points (Ideal)	Remaining Story Points (Actual)
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Day 0	15	15
Day 1	12	13
Day 2	9	10
Day 3	6	6
Day 4	3	3
Day 5	0	0

- The actual line following or improving upon the ideal line indicates a healthy sprint pace.

Visualization tools to create the Burndown Chart:

- Excel / Google Sheets
- Jira / Trello Agile Board
- Visual Paradigm Online

This shows the team completed all planned stories progressively.

You can generate a similar chart using [Atlassian's Burndown Chart Tutorial](#) or [Visual Paradigm's Scrum Tools](#).

Summary:

- **Total Story Points Completed:** 23
- **Velocity:** 12 Story Points per Sprint (Average)
- **Planning Strategy:** All epics broken down into small, manageable stories using Fibonacci sequence for better effort estimation
- **Tools Used:** Google Sheets, Trello (for sprint board), Salesforce Dev Playground

Sprint Planning Table – 5 Days Per Sprint

Sprint 1 – Data Collection & Preprocessing

Day	Task	Story Points	Type	Notes
1	Collect customer and inventory data	2	Data Sourcing	From Excel sheets/manual records
2	Load data into Salesforce objects	1	Configuration	Import via Data Import Wizard

3	Handle missing values	3	Data Cleaning	Ensure clean entries in Billing, Item
4	Create and configure picklist/categorical data	2	Object Setup	Picklists for Ornament_Type, Category
5	Sprint Review + Bug Fixes	-	QA	Internal review and adjustments
Total Story Points (Sprint 1)		8 Points		

Sprint 2 – CRM Development & Automation

Day	Task	Story Points	Type	Notes
1	Create custom objects (Item, Customer, Billing)	5	Configuration	Setup schema and relationships
2	Design Lightning record pages	3	UI/UX	Tabs, layouts for each object
3	Develop Apex Trigger for auto updating payments	3	Backend Logic	Paid_Amount__c = Total_Amount__c - Due
4	Create Record-Triggered Flow for Email notification	5	Automation/Flow	Send billing email upon record creation
5	Sprint Review + Test Deployment	-	QA & Deployment	Validate object linkage and output emails
Total Story Points (Sprint 2)		16 Points		

Velocity Calculation

Metric	Value
Story Points in Sprint 1	8 Points
Story Points in Sprint 2	16 Points
Total Points	24 Points
Number of Sprints	2
Velocity	$24 \div 2 = 12$ Points/Sprint

Your team's **average velocity** is **12 Story Points per Sprint**.

Sprint Status Summary

Sprint	Duration (Days)	Points Planned	Points Completed	Completion %	Remarks
Sprint 1	5	8	8	100%	Data collected, cleaned, and loaded
Sprint 2	5	16	16	100%	Core CRM components configured & tested

Visual Timeline View (2-Week Sprint Schedule)

Phase	Sprint 1 (5 Days)	Sprint 2 (5 Days)
Data Collection	✓ Completed	-
CRM Object Setup	-	✓ Completed
Trigger Development	-	✓ Completed
Automation via Flow	-	✓ Completed
Internal Testing & Email Logs	In Progress	✓ Completed

Planning Insights & Best Practices Followed

- Used **Fibonacci-based Story Points** for accurate complexity estimation.
- Balanced workload across **2 sprints** with clear deliverables.
- Each **Epic** broken into granular stories for better tracking.
- **Internal testing** done within the same sprint for agile feedback.
- Planning done based on team **velocity (12 SP/Sprint)** to ensure realistic deliverables.

Conclusion

- The team followed Agile sprint methodology with accurate estimation, planning, and execution.
- Deliverables aligned with the final outcome of CRM for Jewel Management.
- All components – Data, CRM Architecture, Triggers, Flows, and UI – were delivered within 10 working days over 2 sprints.