**PROJECT PLANNING PHASE**

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| --- | --- |
| **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-1 | Dashboard Setup | USN-6 | As a user, I can view a dashboard showing orders and billing details. | 4 | High | Member 1 |
| 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 ≈ 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) |
| 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](https://www.atlassian.com/agile/tutorials/burndown-charts) or [Visual Paradigm’s Scrum Tools](https://www.visual-paradigm.com/scrum/scrum-burndown-chart/).

**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 ÷ 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)**

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**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.