# Plan Restatement Project: Epics & User Stories (Final Version - Manual Data Process)

## Epic 1: Manual Plan Identification & Data Compilation

\*\*Description:\*\* The Restatement team manually extracts plan data from an external system, refactors it, and cleanses the data before processing for restatement.

### User Stories:

* As a Restatement Team Member, I want to pull the list of plans due for restatement from an external system so that I can ensure accurate data retrieval.
* As a Restatement Team Member, I want to refactor the extracted plan data so that any inconsistencies are corrected before further processing.
* As a Restatement Team Member, I want to cleanse the data by removing duplicates and fixing errors so that only valid plans are included.
* As a CSM, I want to receive a notification when the Restatement team has finalized the plan list so that I can prepare for outreach.
* As a Product Central User, I want to ensure the manually validated data is correctly formatted before it is uploaded to Product Central so that errors are minimized.
* As an Operations Lead, I want a quality assurance check to verify the accuracy of the manually processed data before it moves forward.
* As an MD, I want a final review step before the plan list is uploaded so that I can confirm data integrity.
* As a Reporting Analyst, I want a record of the changes made during manual data cleansing so that audit trails are maintained.

## Epic 2: Multi Directional Integration Between Salesforce, Product Central, and Camunda

\*\*Description:\*\* Ensure seamless integration of data across all systems to improve tracking, processing, and automation.

### User Stories:

* As an MD, I want real-time tracking of plan restatement status so that I can monitor progress.
* As a CSM, I want an automated update when a plan moves from one stage to the next so that I can keep the sponsor informed.
* As a Product Central User, I want all plan data to sync automatically from Salesforce so that there is no manual entry required.
* As a Salesforce & Camunda Workflow Manager, I want error logs generated when data fails to sync so that I can troubleshoot issues quickly.
* As an Operations Lead, I want all restatement workflows to be triggered in Camunda upon Salesforce data updates.
* As a Marketing Manager, I want automated reports on how many plans are successfully moving through the workflow.
* As an MD, I want the ability to override or manually update plan statuses when needed.
* As a CSM, I want a summary report of integration errors to help address missing or delayed updates.

## Epic 3: Ask a Question Process (Helpdesk Process)

\*\*Description:\*\* Combine proactive document sharing, self-service access, and intelligent query resolution into a single streamlined helpdesk process.

### User Stories:

* As a Plan Sponsor, I want to receive my signed restatement document automatically so that I don’t have to request it manually.
* As an MD, I want a self-service portal where I can retrieve any signed document instantly.
* As a CSM, I want the ability to search for documents by plan ID or sponsor name to quickly assist with inquiries.
* As an Operations Lead, I want automated tracking of document access so that compliance and reporting needs are met.
* As a Product Central User, I want to access plan history and related queries in a single location so that I can handle sponsor requests efficiently.
* As a CSM, I want a structured ticketing system to ensure all sponsor queries are tracked and resolved in a timely manner.
* As an MD, I want to monitor response times for helpdesk queries so that I can ensure high levels of customer service.
* As a Marketing Manager, I want analytics on common helpdesk issues to improve future process efficiencies.

## Epic 4: Advanced Reporting & Analytics Dashboards

\*\*Description:\*\* Provide real-time analytics and performance metrics on the plan restatement process.

### User Stories:

* As an MD, I want a dashboard that shows the real-time progress of all plan restatements.
* As a CSM, I want a report that highlights which sponsors have not yet signed so that I can follow up.
* As a Product Central User, I want to track how long it takes for a plan to move from one stage to another.
* As an Operations Lead, I want a breakdown of compliance failures so that I can mitigate risks in future restatement cycles.
* As a Salesforce & Camunda Workflow Manager, I want analytics on system performance to optimize automation workflows.
* As a Marketing Manager, I want a report on how effective email campaigns were in prompting timely signatures.
* As a Plan Sponsor, I want visibility into where my plan is in the process so that I don’t need to make inquiries.
* As an MD, I want monthly reports that compare completion rates to previous cycles.

## Epic 5: Risk Management & Exception Handling Framework

\*\*Description:\*\* Implement a structured process for identifying, mitigating, and tracking risks in the restatement workflow.

### User Stories:

* As an MD, I want an automated system to flag high-risk restatement delays.
* As a CSM, I want to be alerted when a compliance risk is detected in a plan.
* As an Operations Lead, I want a system that categorizes risks based on severity.
* As a Salesforce & Camunda Workflow Manager, I want exception workflows that automatically reroute problem cases.
* As a Product Central User, I want a risk summary available on the dashboard.
* As a Marketing Manager, I want historical risk trends to help improve future cycles.
* As an MD, I want an executive report summarizing risk mitigation efforts.
* As an Operations Lead, I want an archive of resolved exceptions for audit purposes.

## Epic 6: Scalability & Future Enhancements for Next Restatement Cycle

\*\*Description:\*\* Design the system to be scalable for future restatement cycles, allowing enhancements based on previous cycle performance.

### User Stories:

* As an MD, I want the system to scale for more plan restatements.
* As a CSM, I want workflow improvements based on past cycle performance.
* As a Product Central User, I want system enhancements that make data entry faster.
* As an Operations Lead, I want to analyze workload distribution.
* As a Salesforce & Camunda Workflow Manager, I want automated testing for new enhancements.
* As a Marketing Manager, I want feedback loops to optimize communication strategies.
* As a Plan Sponsor, I want a seamless process that is easier every cycle.
* As an MD, I want predictive analytics for the next cycle.

## Epic 7: Task Management for Non-Automated Scenarios

\*\*Description:\*\* Implement a structured process for handling manual tasks within the plan restatement process where automation is not feasible.

### User Stories:

* As an MD, I want a tracking system for manually handled tasks so that I can monitor their progress.
* As a CSM, I want a workflow to assign non-automated tasks to the appropriate team members so that no task is missed.
* As an Operations Lead, I want a dashboard that shows pending manual tasks so that I can allocate resources accordingly.
* As a Product Central User, I want the ability to document and track manual interventions so that process integrity is maintained.
* As a CSM, I want reminders for incomplete manual tasks so that I can follow up as needed.
* As a Marketing Manager, I want reports on manual task resolution times so that I can identify areas for improvement.
* As an MD, I want escalation processes for overdue manual tasks so that critical issues are addressed promptly.
* As an Operations Lead, I want to categorize manual tasks by priority so that urgent cases receive immediate attention.