# Title: August 2018 Aspirations



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| **Aspirations - August 2018** Freshsales, Squad 222 Aug 2018 |
| Mission:   * Provide better reporting in CRM space * Continue evolving integrated phone as USP of Freshsales * Powerful automations - Workflow * Plans & billings |

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| --- | --- | --- | --- |
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## **Success metrics - KPIs (Key Performance Indicators)**

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| --- |
| 1. Features shipped 2. Number of Jira items resolved |

## **Previous Aspirations Link:**

[**Squad 2 - July 2018 Aspiration**](https://confluence.freshworks.com/pages/viewpage.action?pageId=191632835)

## **Results: How did we do since last Aspirations? (Planned vs Delivered - Summaries the results and provide applicable links)**

|  |  |  |
| --- | --- | --- |
| Goal (from previous Aspirations) | Results | Deliverables |
| Scoping in reports: Applying Global, Restricted and Territory access to report data | Done |  |
| Option to schedule while creating reports and dashboards | Done |  |
| Create new report directly from dashboard | Done |  |
| Support hours in due date of workflow Task Action | Done |  |
| Missing fields in Workflow Automation on filter condition and placeholder | Done |  |
| Missing fields in Custom Report on condition, grouping and select fields | Done |  |
| Toaster for admins when billing date is due | Done |  |
| In-product notifications for report/dashboard | Done |  |
| Prevent direct downgrade to free plan(Sprout) | done |  |
| Adding convert lead action in workflow automation | QA |  |
| Freshcaller integration | QA |  |
| Automation - Freshcaller Integration | In Progress | [Senthil vel](https://confluence.freshworks.com/display/~senthilvelp) |

## **Success metric trend (over the past 3 months)**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Metric | July 2018 | June 2018 | May 2018 |  |  |  |  |
| Features shipped | 4 | 1 | 1 |  |  |  |  |
| Number of Jira items resolved | 67 | 87 | 57 |  |  |  |  |
| Number of test cases automated | - | - | \_ |  |  |  |  |

## **Top contributors (since** **last Aspirations - please leave this section blank if data not available)**

|  |  |
| --- | --- |
| Name | Contribution |
|  |  |

## **Top Issues (faced since last Aspirations)**

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| --- | --- | --- |
| Issue | Root cause | Recurring |
|  |  |  |

## **Plan for next month (or) Aspirations**

|  |  |
| --- | --- |
| Goal | Deliverables |
| Sales Campaign   * Trigger based campaign |  |
| Workflow   * Allow updating properties with related record's value * UI Improvements |  |
| Report   * Scheduled report email - content and UI changes * Report platform migration |  |
| Automation   * Complete Freshcaller Integration |  |

|  |  |
| --- | --- |
| Stretch goal | Deliverables |
|  |  |

## **Identified risks**

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| --- | --- | --- |
| Risk | Mitigation strategy | Recurring |
| Response time increased after adding user scope to report | Separate layer for report requests |  |

## **Do you have any specific asks? (any help needed to address constraints, unblocking, ...)**

**(Please keep this list engineering related - this section is optional)**

|  |  |  |
| --- | --- | --- |
| Ask | Impact | Recurring |
|  |  |  |

## **Peer appreciation**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Appreciated by | Impact | In their own words |
| Mudhabir |  | For shipping features related to core billing modules |  |

## **Plan/Roadmap/Vision - that extends beyond one month**

* workflow enhancements - Create recurring deal, send sms, schedule emails, advanced filter logic
* freshreport platform migration

## **Demo/Deep dives/Miscellaneous items/...**