# Title: Sales 360 - CRM BU - Weekly Status Report - 13th Jan 2020 - (Program Bugatti)

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| --- | --- | --- |
| Date Updated | 13 Jan 2020 | |
|  | **Owners** | **Escalation Matrix** |
| FreshSales | PM - [Venkataraman Natarajan](https://confluence.freshworks.com/display/~venkataraman.natarajan)  Arch - [Sudharshan Jayasampath](https://confluence.freshworks.com/display/~sudharshan.jayasampath)  EM - [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam)  TPM - [Preethi Mahalingam](https://confluence.freshworks.com/display/~preethi.mahalingam) | [Mariappan Vaithilingam](https://confluence.freshworks.com/display/~mariappan.vaithilingam) |
| FreshMarketer | PM - [Amrita Ethiraj](https://confluence.freshworks.com/display/~amrita.ethiraj)  Arch/EM - [Thirumalai Raj](https://confluence.freshworks.com/display/~thirumalai.raj)  TPM - [Preethi Mahalingam](https://confluence.freshworks.com/display/~preethi.mahalingam) | [Mariappan Vaithilingam](https://confluence.freshworks.com/display/~mariappan.vaithilingam) |

### Program Summary

Program Bugatti is the code name for CRM BU's(FreshSales and FreshMarketer) integration into the Sales 360 program.  The objective of this program is to deliver high quality Customer Preview  release version of Sales 360 using FreshSales as the anchor product by 31st March 2020.  This program has been split into  4 tracks namely MCR , UFX, Unified Experience and Product Impact areas and we have come up with the timelines and dependencies.

Current Status for Milestone 1 (MCR Integration) by March 13th for FreshSales- RED

Current Status for Milestone 1 (MCR Integration) by Jan 24th for FreshMarketer - GREEN

**Key callouts:** -

                            Internal grooming/discussions started for a few key components on Jan 13th. Post that squads have to groom the stories and that can lead to

                            additional dev/test efforts

                            Last week the FSales Engg team prepared a Sales 360 Execution plan and presented it to all stake holders. In that plan we had called out that FSales

                            has scoped 51 User Stories for the March 31st deadline

                            Post that , a scope discussion with PMs took place and the current user story count is 60 and growing.

                            Plan is to execute Sales 360 with  5 squads from FSales (comprising of 1 mobile squad)

                            Link to operational doc -

**Path to Green -** Daily internal discussion/grooming has been kickstarted from Jan 13th

                            Dependencies discussion has been kickstarted with respective teams

                            Started holding daily scrum of scrums between FSales and FMarketer to go over status/ blockers/dependencies

### Tracks and Current Status :

***FreshMarketer***

| # | Tracks | Sub-Tracks | ETA (QA complete) | Last Week  ( 6-Jan-2020) | This Week  ( 13-Jan-2020) | Comments |
| --- | --- | --- | --- | --- | --- | --- |
| M1 | MCR |  | 24 Jan 2020 | ON TRACK | ON TRACK | Estimation is done. Squads have started working on the actual items  Open items which are not blockers to start:   1. Anonymous visitors 2. Merge use case 3. Subscription type - Options we need to share to Freshsales 4. List sync with Freshsales 5. Notifications for changes in the Formserv 6. Timeline activities |
| M2 | UFX   1. User Management 2. Role Management 3. Billing |  | Yet to come up with ETA.  ETA for ETA : 21 Jan 2020 | RED | RED | 1. Central payload needs to be shared from FreshID 2. A static role file needs to be shared from Freshsales. The central payload for Role consumption needs to be shared from FreshID 3. Billing - i2p not yet started |
| M3 | Unified Experience |  | Yet to come up with ETA  ETA for ETA : 21 Jan 2020 | RED | RED | i2p in progress. |
| M4 | Product Impact areas |  | Yet to come up with ETA  ETA for ETA : 21 Jan 2020 | RED | RED | * i2p for the Merge use case * List sync with Freshsales * API key authentication for Freshsales block * Merge use case * Use cases for Primary email & Secondary email * Impact on Readonly & Hidden fields configured in Freshsales |
| M5 | Unified LeftNav bar web component |  | Yet to come up with ETA.  ETA for ETA : 21 Jan 2020 | RED | RED | i2p in progress |

### **FreshSales**

**Items for Customer Preview -**[**https://freshworks.freshrelease.com/FSALES/issues/filter/30297**](https://freshworks.freshrelease.com/FSALES/issues/filter/30297)

| # | Tracks | Sub-Tracks | ETA | Last Week  ( 6-Jan-2020) | This Week  ( 13-Jan-2020) | Comments |
| --- | --- | --- | --- | --- | --- | --- |
| M1 | MCR |  | 13 Feb 2020 | RED | RED |  |
|  |  | MCR Sync |  |  |  | 1. Internal grooming/discussion started on 13 Jan 2020 2. Teams started grooming on 4 user stories - FSALES-16492,FSALES-16493,FSALES-16494,FSALES-16497 |
|  |  | Fields Revamp |  |  |  | 1. Internal grooming/discussion started 2. Team started grooming 3 user stories - FSALES-16417, FSALES-16418, FSALES-16432 |
|  |  | Forms Sync |  |  |  | We are planning to groom forms sync related user stories by Jan 17, 2020 |
|  |  | Event and Timelines |  |  |  | 1. Dependency on MCR team. MCR to complete their development by Jan 31st |
| M2 | UFX |  | 21 Feb 2020 | RED | RED | 1. Internal Discussions and grooming has not yet started 2. Dev and test plan could change post the discussion 3. Dependency on FreshID/Aloha team |
| M3 | Unified Product Experience |  | 13 Mar 2020 | RED | RED | 1. Unknown area for the team 2. ETA for Unified NAV bar is not yet known 3. Once unified NAV bar is integrated, need to plan for Integration Testing and it requires co-ordination of plans and timelines from all products |
| M4 | Product Impact Areas |  | 27 Mar 2020 | RED | RED | 1. Internal grooming is pending 2. Any spillover of above 3 tracks will affect the timeline for this |

### **Action Items**

| [S.no](http://s.no/) | Action Item | Owner | ETA | Current Status | Comments |
| --- | --- | --- | --- | --- | --- |
| 1 | Plan on keeping their calendars free from 11 am to 1.30 pm for grooming starting Jan 13th | [Sudharshan Jayasampath](https://confluence.freshworks.com/display/~sudharshan.jayasampath) | 17 Jan 2020 | In Progress | Sudharshan , Venkat , Vijay and Prem to meet daily to groom/internally discuss the pending stories |
| 2 | Sales related product impact areas - 4th swim lane. To be reviewed | [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam) | 14 Jan 2020 | Closed | <https://freshworks.freshrelease.com/FSALES/issues/filter/30297> is updated with latest 'beta only' user stories. |
| 3 | Provide the list of stories that need to be ready of grooming by Jan 13th. If any exception involve PM. | [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam) | 13 Jan 2020 | Closed | Jan 13, 14 → entities sync of MCR  Jan 17, 18 → forms related user stories of MCR |
| 4 | Rephrase /Internal grooming ETA in the operational doc | [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam) | 13 Jan 2020 | Closed | Done on Jan 8 |
| 5 | To provide ETA on External dependencies | [Janani Jayaraman](https://confluence.freshworks.com/display/~janani.jayaraman) |  | In Progress | Shared a list of asks to Janani |
| 6 | Run through all FSales user stories and clearly call out Beta scope items | [Srivatsan Venkatesan](https://confluence.freshworks.com/display/~srivatsan.venkatesan) | 13 Jan 2020 | Done | Done on Jan 10 |
| 7 | Plan for Integration test suite. | [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam) | 21 Jan 2020 | In Progress |  |
| 8 | To talk to Aishwerya and check if any resources from other teams are interested for QA activities for Sales 360 | [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam) | 17 Jan 2020 | In Progress | Communicated with Aishwerya.  She will send the mail post pongal holidays. |
| 9 | To prepare a Timeline chart for Sales/Marketer milestones | [Preethi Mahalingam](https://confluence.freshworks.com/display/~preethi.mahalingam) | 17 Jan 2020 | In Progress |  |
| 10 | Call out demo dates and items - For every month's milestone | [Preethi Mahalingam](https://confluence.freshworks.com/display/~preethi.mahalingam) | 14 Jan 2020 | In Progress | Preethi to work with Amrita/Vijay and come up with demo dates |
| 11 | To provide the list of asks to FSales from other teams | [Janani Jayaraman](https://confluence.freshworks.com/display/~janani.jayaraman) | 21 Jan 2020 | In Progress |  |
| 12 | Provide a high level number of test case count for Freshsales | [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam) | 21 Jan 2020 | In Progress |  |
| 13 | Provide a high level number of test case count for Freshmarketer | [Santhosh Kumar](https://confluence.freshworks.com/display/~santhosh.kumar) | 21 Jan 2020 |  |  |
| 14 | Confirm if FSALES-16565, FSALES-16566 are beta items | [Sudharshan Jayasampath](https://confluence.freshworks.com/display/~sudharshan.jayasampath) [Venkataraman Natarajan](https://confluence.freshworks.com/display/~venkataraman.natarajan) | 17 Jan 2020 | In Progress |  |
| 15 | Local fields that are to be deleted | [Sudharshan Jayasampath](https://confluence.freshworks.com/display/~sudharshan.jayasampath) | 17 Jan 2020 | In Progress | A decision needs to be taken on this sooner as it would impact Beta timelines  Sudharshan to discuss with Sri/Venkat and get back on this |
| 16 | Post beta items - FSALES-16571, FSALES-16572,FSALES-16573 to be reviewed by Sudharshan and taken up with external teams to drive this forward | [Sudharshan Jayasampath](https://confluence.freshworks.com/display/~sudharshan.jayasampath) | 22 Jan 2020 | In Progress |  |
| 17 | Number of selected choices in UI dropdown and that can be displayed is 20. Sri's expectation is 100. Sudharshan and Venkat to discuss and decide on this. | [Sudharshan Jayasampath](https://confluence.freshworks.com/display/~sudharshan.jayasampath) | 22 Jan 2020 | In Progress |  |
| 18 | Few user stories are yet to be created | [Venkataraman Natarajan](https://confluence.freshworks.com/display/~venkataraman.natarajan) | 17 Jan 2020 | In Progress | New user stories will increase beta timelines |
| 19 | Decisions with respect to unified experiences to be taken. - Settings - Individual contact view in segments - Folders in list/segment | [Venkataraman Natarajan](https://confluence.freshworks.com/display/~venkataraman.natarajan)  [Sudharshan Jayasampath](https://confluence.freshworks.com/display/~sudharshan.jayasampath) | 21 Jan 2020 | In Progress |  |

### Dependencies:

MCR - [MCR - Open Items](https://confluence.freshworks.com/pages/viewpage.action?pageId=230089696)

UFX - [UFX<>Sales 360 Open Items](/pages/createpage.action?spaceKey=PLAT&title=UFX%3C%3ESales+360+Open+Items)

| # | Dependencies | Ask from | Ask to | ETA | Status | Comments |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | Central payload required from freshID | FMarketer | FreshID | 14 Jan 2020 | Open | [Amrita Ethiraj](https://confluence.freshworks.com/display/~amrita.ethiraj)  - Will verify with FreshID by 14th jan on whether what is available in the json can be consumed |
| 2 | List sync between Sales and marketer | FMarketer | Fsales | ETA for ETA 14 Jan 2020 | Open | To be discussed on 14 Jan 2020 s meeting  Decided to go through with central. To be followed up with [Bhagirath Goud](https://confluence.freshworks.com/display/~bhagirath.goud) |
| 3 | Readonly and Hidden fields handling | FMarketer | FormServ | 17 Jan 2020 | Open |  |
| 4 | CustomField names should be similar to Sales and Marketer | FMarketer | FSales | ETA for ETA 14 Jan 2020 | Open | To be discussed on 14 Jan 2020 s meeting  Venkat to provide the list |
| 5 | Translate List entity to a multi choice field inside contacts. Whenever a list is associated to a contact, we will be updating the subscribers table. This also needs to be pushed to the new contact field. - List associate - List dis-associate | FMarketer | FSales | ETA for ETA 14 Jan 2020 | Open | To be discussed on 14 Jan 2020 s meeting  Decided to go through with central. To be followed up with [Bhagirath Goud](https://confluence.freshworks.com/display/~bhagirath.goud) |
| 6 | Timelines and Events | FMarketer | MCR | 14 Jan 2020 | Open | [Amrita Ethiraj](https://confluence.freshworks.com/display/~amrita.ethiraj)  to provide list of events to MCR by 14 Jan 2020 |
| 7 | Make Int environment for  dev->int->staging->sandbox(int)->prod | FMarketer | FSales | 17 Jan 2020 | Open | [Janani Jayaraman](https://confluence.freshworks.com/display/~janani.jayaraman) to follow up |
| 8 | UFX:- roles & permissions - UI should not be configurable for beta | FMarketer | FSales | ETA for ETA 14 Jan 2020 | Open | VEnkat to provide privileges added to a role |
| 9 | Add a new custom field/  Update/Delete and existing form field  Add/Update/Delete a choice to dropdown /multislect | FMarketer | FormServ | 17 Jan 2020 | Open | [Janani Jayaraman](https://confluence.freshworks.com/display/~janani.jayaraman) to follow up |
| 10 | To decide on common form for Sales 360 | FreshSales | FormServ | 17 Jan 2020 | Open |  |
| 11 | For Events and Timeline , we require data from MCR team | FreshSales | MCR | 31 Jan 2020 | Open |  |
| 12 | For UFX , dependency with FreshID/Aloha team | FreshSales | FreshID | 17 Jan 2020 | Open |  |
| 13 | Availability of Unified NAV Bar | FreshSales | FMarketer | 24 Jan 2020 | Open |  |
| 14 | Co ordination for Integration Testing | FreshSales | All teams | TBD |  |  |

### Risks & Mitigation

| # | Team | Risk | State | Mitigation |
| --- | --- | --- | --- | --- |
| 1 | FSales | 16 user stories are not scoped for Beta. If decided to be done for Beta, then this ETA and dev/test plan will vary. | Mitigated | Scope discussed with PM team and 'Sales-360-Beta' tag added. |
| 2 | FSales | MCR-Fields Revamp: Internal grooming not yet completed and post grooming might increase scope/user stories | Mitigated | Daily sync ups with stake holders in place.  Currently, planning to finish entities sync and then start this |
| 3 | FSales | MCR - Forms Sync : Internal grooming not yet completed for this feature | Mitigated | Daily sync ups with stake holders in place. Currently, planning to finish entities sync. Post that, we will start Forms sync/Fields revamp. |
| 4 | FSales | MCR-Events and Timeline : Without clarity from MCR on when they will give their deliverable, the timelines for this  feature cannot be determined | Open | MCR-Fsales meeting scheduled. Action items from the meeting need to be closed by Fsales on 17 Jan 2020 |
| 5 | FSales | UFX - Internal discussion and grooming not yet started for this feature | Mitigated | Daily meetings are blocked in calendar starting 13 Jan 2020  with stakeholders |
| 6 | FSales | UFX - Estimates/ETA provided are tentative and bound to change post discussion/grooming |  |  |
| 7 | FSales | Unified Product Experience and Product Impact areas - Internal discussion/grooming to be completed by Jan 24th else dates might slip | Mitigated | Daily meetings are blocked in calendar starting 13 Jan 2020  with stakeholders |
| 8 | FSales | Post discussion with PM team, we have a list of 60 asks that are marked for 'Customer Preview'. Also, this number will increase based on the discussion with PM on existing swimlanes. | Open | Need to discuss a plan on action on how to scope this for the Mar 31st deadline |

### MileStones and Demo Dates

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| S.No | Team | Milestone | Feature Complete/Demo Date | Owner | Comments |
| 1 | FMarketer | **MCR** - Contact Field Changes | 15 Jan 2020 | [Santhosh Kumar](https://confluence.freshworks.com/display/~santhosh.kumar)  [Amrita Ethiraj](https://confluence.freshworks.com/display/~amrita.ethiraj) |  |
| 2 | FMarketer | **MCR** -  MCR to FMarketer | 24 Jan 2020 | [Santhosh Kumar](https://confluence.freshworks.com/display/~santhosh.kumar)  [Amrita Ethiraj](https://confluence.freshworks.com/display/~amrita.ethiraj) | INT environment required from Formserv and MCR. Communicated to [Janani Jayaraman](https://confluence.freshworks.com/display/~janani.jayaraman) |
| 3 | FMarketer | **MCR** -   FMarketer to MCR | 24 Jan 2020 | [Santhosh Kumar](https://confluence.freshworks.com/display/~santhosh.kumar)  [Amrita Ethiraj](https://confluence.freshworks.com/display/~amrita.ethiraj) | NT environment required from Formserv and MCR. Communicated to [Janani Jayaraman](https://confluence.freshworks.com/display/~janani.jayaraman) |
| 4 | FSales | **MCR**-  MCR Sync | 14 Feb 2020 | [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam) | Granular milestones can be called out after grooming with the squads |
| 5 | FSales | **MCR** - Fields Revamp | 13 Mar 2020 | [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam)  [Venkataraman Natarajan](https://confluence.freshworks.com/display/~venkataraman.natarajan) | Granular milestones can be called out after grooming with the squads |
| 6 | FSales | **MCR** - Forms Sync | 06 Mar 2020 | [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam) | Granular milestones can be called out after grooming with the squads |
| 7 | FSales | **MCR -**  Events and Timelines | 13 Mar 2020 | [Vijayaragavan Venkatarathinam](https://confluence.freshworks.com/display/~vijayaragavan.venkatarathinam) | Granular milestones can be called out after grooming with the squads |

### Work Breakdown Status   - FSales

| S.No | FreshRelease | Description | Squad | ETA | Last Week  ( 6-Jan-2020) | This Week  ( 13-Jan-2020) | Comments |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1 | [FSALES-16419](https://freshworks.freshrelease.com/FSALES/issues/FSALES-16419) | Create MCR Contact ID version | Alpha | 21 Jan 2020 |  | In Progress |  |
| 2 | [FSALES-16706](https://freshworks.freshrelease.com/FSALES/issues/FSALES-16706) | Create MCR Company Account | Alpha | 21 Jan 2020 |  | In Progress |  |
| 3 | [FSALES-16543](https://freshworks.freshrelease.com/FSALES/issues/FSALES-16543) | Change FB to handle from URL | Alpha | 21 Jan 2020 |  | In Progress |  |
| 4 | [FSALES-16544](https://freshworks.freshrelease.com/FSALES/issues/FSALES-16544) | Change Twitter to handle from URL | Alpha | 21 Jan 2020 |  | In Progress |  |
| 5 | [FSALES-16545](https://freshworks.freshrelease.com/FSALES/issues/FSALES-16545) | Change LinkediN to handle from URL | Alpha | 21 Jan 2020 |  | In Progress |  |
| 6 | [FSALES-16708](https://freshworks.freshrelease.com/FSALES/issues/FSALES-16708) | Disable uniqueness for Custom fields | Byebuggers | 21 Jan 2020 |  | In Progress |  |