# Title: Sleeper Cells - Mid Q2 2019 Aspirations



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| **Aspirations - Q2 2019** Freshsales, Sleeper Cells21 May 2019 |
| Mission:   * Provide better reporting in CRM space * Continue evolving integrated phone in Freshsales * Powerful automations - Workflow, Sales Campaign * Plans & Billings |

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

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| --- |
| 1. Features shipped 2. Number of tickets resolved 3. Test cases automated - RSpec coverage 4. Number of UI test cases automated |

## **Previous Aspirations Link:**

[**Sleeper Cells - Q2 2019 Aspirations**](https://confluence.freshworks.com/pages/viewpage.action?pageId=210019228)

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

|  |  |  |
| --- | --- | --- |
| Goal (from previous Aspirations) | Results | Deliverables |
| FreshID Organisation V2 \* | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-7931> |
| Field permissions in workflows, sales campaigns, reports and dashboards \* | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-10301>  <https://freshworks.freshrelease.com/FSALES/issues/FSALES-10300>  <https://freshworks.freshrelease.com/FSALES/issues/FSALES-9842>  <https://freshworks.freshrelease.com/FSALES/issues/FSALES-9960>  <https://freshworks.freshrelease.com/FSALES/issues/FSALES-9961> |
| ML - Deduplication \* | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-9620> |
| Audit logs for sales campaign, workflow automation and territory \* | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-8013> |
| Tagging in workflow (Add tag, Remove tag, filter condition)\* | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-8686> |
| Workflow action : Send email to owner to support From sales email address | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-9750> |
| Workflow - Updating all related accounts for a contact | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-9790> |
| Workflow - Update null value for reference field | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-10112> |
| Lookup fields support in reports for User entity | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-9745> |
| Sales campaign - Admin setting to default - check duplicates in sales campaign | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-9653> |
| Create task or appointment from call log | Done | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-4371> |
| Sales campaign - Step level filters to include conditions on Task and call reminder | In Testing | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-8648> |
| View sharing (enabling territory, team for views) | In Testing | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-8709> |
| ML - Freddy (Deal insights) | In Progress | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-10105>  <https://freshworks.freshrelease.com/FSALES/issues/FSALES-8194> |
| Freshreports migration | In Progress | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-10852> |
| Increasing the custom field limits | In Progress | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-8267> |
| SMS action in sales campaign | In progress | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-10095> |

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

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| --- | --- | --- | --- |
| Metric | Since Last Aspirations | Q2 2019 | Q1 2019 |
| Features/Enhancements shipped | 5 | 5 | 4 |
| Number of tickets resolved | 93 | 71 | 53 |
| RSpec coverage | 81.82% | 78.12% | 58% |

### Automation coverage:

|  |  |  |
| --- | --- | --- |
|  | Since Last Aspirations | Q2 2019 |
| Test cases | Total cases: 1544  High and critical: 502 | Total cases: 1362  High and critical: 463 |
| New cases | Overall : 182  High and critical: 39 | Overall : 176  High and critical: 76 |
| Automation coverage(P0 and P1) | 56.44 % | 52% |
| Cases Automated(P0 and P1) | 24 | 51 |

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

|  |  |
| --- | --- |
| Goal | Deliverables |
| SMS provider zipwhip integration |  |
| SMS receiving |  |
| Email template sharing for team/ territory |  |
| Comma not supported in filter value |  |
| Deprecate inbuilt phone channel |  |

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

|  |  |
| --- | --- |
| Name | Contribution |
| [Mudhabir Ahmed](https://confluence.freshworks.com/display/~Mudhabir.Ahmed) [Venkatasurya Tejamatcha](https://confluence.freshworks.com/display/~venkatasurya.tejamatcha)  [Athish Pranav Sethuram](https://confluence.freshworks.com/display/~athishpranav.sethuram) | Audit logs for sales campaign, workflow automation and territory |
| [Lakshmisai Varshitha](https://confluence.freshworks.com/display/~lakshmisai.varshitha) [Prakash Thiyagarajan](https://confluence.freshworks.com/display/~prakash.thiyagarajan)[Rohan Anand](https://confluence.freshworks.com/display/~rohan.anand)  [Athish Pranav Sethuram](https://confluence.freshworks.com/display/~athishpranav.sethuram)[Logesh Srinivasan](https://confluence.freshworks.com/display/~logesh.srinivasan) | Field permissions in workflows, sales campaigns, reports and dashboards |
| [Kathirvalavan S](https://confluence.freshworks.com/display/~kathirvalavan)  [Ramkumar Ramani](https://confluence.freshworks.com/display/~ramkumar.ramani) | FreshId Org V2 |
| [Ajeet Pandey](https://confluence.freshworks.com/display/~ajeet.pandey)  [Logesh Srinivasan](https://confluence.freshworks.com/display/~logesh.srinivasan) | ML - Deduplication |

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

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

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

## **Identified risks**

|  |  |  |
| --- | --- | --- |
| Risk | Mitigation strategy | Recurring |
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## **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**

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| --- | --- | --- | --- |
| Name | Appreciated by | Impact | In their own words |
|  |  |  |  |

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

* Freshreport platform migration
* Deprecate inbuilt phone

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