# Title: Squad 1 - February 2018 Aspirations

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| **Aspirations - Feb 2018** Freshsales, Squad 1, 06/02/2018 |
| Mission:   * Build and roll out integration faster. * Build features on core objects and associated ones. * Evolve and Maintain CSV import, Migration from other CRMs |

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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 3. Number of test cases automated |

## **Previous Aspirations Link:**

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

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| Goal (from previous Aspirations) | Results | Deliverables |
| Integration - Quickbooks [Aravinth Chandran](https://confluence.freshworks.com/display/~aravinthchandran) [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) | Done | Unable to render Jira issues macro, execution error. |
| Integration - Office 365 Calendar [Ujjawal Narayan](https://confluence.freshworks.com/display/~ujjawal.narayan) [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) | Done | Unable to render Jira issues macro, execution error. |
| Core - Outcome for Task, Appointment and Call logs [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) [Uma Baskaran](https://confluence.freshworks.com/display/~uma.baskaran) | Done | Unable to render Jira issues macro, execution error. |
| CSV Import - Saving last mapping of import and auto map [Ujjawal Narayan](https://confluence.freshworks.com/display/~ujjawal.narayan) [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) | In QA | Unable to render Jira issues macro, execution error. |
| Core - Export Performance changes [Irfan Shaik](https://confluence.freshworks.com/display/~irfan.shaik) [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) | Done | Unable to render Jira issues macro, execution error. |
| CSV Import - Notifications on status of import [Ujjawal Narayan](https://confluence.freshworks.com/display/~ujjawal.narayan) [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) | Done |  |
| Integrations - Freshpipe sync L2 issues [Irfan Shaik](https://confluence.freshworks.com/display/~irfan.shaik) | Total tickets in Jan 2018 - 29  Resolved/Fixed - 22  Pending - 7 |  |

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

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| Metric | Jan 2018 | Dec 2017 |
| Features shipped | 3 | 1 |
| Number of Jira items resolved | 34 | 10 |
| Number of test cases automated(high + critical) | 147 - Done. 331 - Pending. 905 - Total | N.A. |

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

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| Goal | Deliverables |
| CSV Import - Import history and filtering based on past imports |  |
| CSV Import - Provide option to update based on custom fields |  |
| Integration - Xero |  |
| Integration - Update Freshdesk ticket sync to latest UI |  |
| Integration - Marketplace Onboarding |  |
| CRM Migration - Support large files migration from Salesforce |  |
| Core - Real time email notification for Lead Assigned and Lead Transferred with Settings |  |
| Core - Update last activity mode/time based on default sales activities as well |  |
| Core - When a user is assigned a record, give option to transfer all related activities to the user |  |
| Core - Show avatar in reminder notification for task and appointment |  |

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| Stretch goal | Deliverables |
| Core - Freshsales onboarding to Central |  |
| Core - Email and in app notifications for incoming chat to owner |  |
| Core - When account is deleted, ask consent from user to delete its associated entities |  |
| Integration - Segment integration - Transform fields from payload to default & custom fields |  |

## **Identified risks**

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| Risk | Mitigation strategy | Recurring |
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## **Do you have any specific asks? (any help needed to address constraints, unblocking, ...)**

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| Ask | Impact | Recurring |
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## **Peer appreciation**

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| Name | Appreciated by | Impact | In their own words |
| Ujjawal |  |  |  |
| Buden |  |  |  |

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

* Integration - Documents - Pandadoc, Dropbox
* Integration - E-Signature - Docusign, Echosign, GetAccept
* Marketplace app development.
* Reseller Portal