# Title: Squad 1 - Mid Q4 2018 Aspirations

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| **Aspirations - Mid Q4 - 2018** Freshsales, Squad 1 - 19 Nov 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. Test cases automated - RSpec coverage 4. Number of UI test cases automated |

## **Previous Aspirations Link:**

[Squad 1 - August 2018 Aspirations](https://confluence.freshworks.com/display/freshsales/Squad+1+-+August+2018+Aspirations)

## **Summary**

### Shipped

2 Features -  Xero, Hover card

5 Tech Debts

5 Enhancements

1 Security issue

### In progress

3 Features -  Deduplication, Multi currency, Multiple sales accounts

### Starting

3 Features - Multi currency v2, Hover card v2, Marketo ↔ Freshsales sync

3 Enhancements - in CRM migration and CSV import

## **Results: How did we do since last Aspirations? (Planned vs Delivered)**

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| Goal (from previous Aspirations) | Results | Deliverables |
| Core - Finding duplicate leads/contacts and Similar leads/contacts  [Irfan Shaik](https://confluence.freshworks.com/display/~irfan.shaik) | In progress | Unable to render Jira issues macro, execution error. |
| Core - Multi currency support  [Aravinth Chandran](https://confluence.freshworks.com/display/~aravinthchandran) | In progress | Unable to render Jira issues macro, execution error. |
| Core - Option to associate multiple sales accounts to contacts - Phase 2  [Ashish Muralidharan](https://confluence.freshworks.com/display/~ashish.muralidharan) | In progress | Unable to render Jira issues macro, execution error. |
| Core - Onboard central publisher gem to push backend events from Freshsales to Central  [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) | On hold | Unable to render Jira issues macro, execution error. |
| Core - Add index to tasks to improve performance - Tech Debt  [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) | Done | Unable to render Jira issues macro, execution error. |
| Export - Vulnerable Gem (CVE-2018-1000544) - rubyzip upgrade - Security  [Irfan Shaik](https://confluence.freshworks.com/display/~irfan.shaik) | Done | Unable to render Jira issues macro, execution error. |
| Core - Reduce queries by moving to memcache in Lead model - Tech Debt  [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) | Done | Unable to render Jira issues macro, execution error. |
| Core - Rspec for Tasks/Appointments/Sales activities - Tech Debt  [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) | Done | Unable to render Jira issues macro, execution error.  Unable to render Jira issues macro, execution error.  Unable to render Jira issues macro, execution error. |
| Core - Add index to sales activities to improve performance - Tech Debt  [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) | Done | Unable to render Jira issues macro, execution error. |
| Core - Hover card in list views  [Nivedita Peddiraju](https://confluence.freshworks.com/display/~nivedita.peddiraju) [Uma Baskaran](https://confluence.freshworks.com/display/~uma.baskaran) | Done | Unable to render Jira issues macro, execution error. |
| Core - Track sales activity mode and time for Deal  [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) [Gayathri Rukmadhavan](https://confluence.freshworks.com/display/~gayathri.rukmadhavan) | Done | Unable to render Jira issues macro, execution error.  Unable to render Jira issues macro, execution error. |
| Integration - Xero  [Aravinth Chandran](https://confluence.freshworks.com/display/~aravinthchandran) [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) @bala | Done | Unable to render Jira issues macro, execution error. |
| Core - Reduce Queries in while framing document for ES - Tech Debt  [Aravinth Chandran](https://confluence.freshworks.com/display/~aravinthchandran) @bala | Done | Unable to render Jira issues macro, execution error. |
| Core - Voice Notes [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) | Done | Unable to render Jira issues macro, execution error. |
| Core - Introducing Sidebar in landing pages [arun infant ignatius](https://confluence.freshworks.com/display/~arunm@freshdesk.com) [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) | Done | Unable to render Jira issues macro, execution error. |
| Integration - Frontend events for tasks/appointments  [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) | Done | Unable to render Jira issues macro, execution error. |
| Integration - Autopilot to Freshsales custom sync for internal account  [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) [Ramkumar Ramani](https://confluence.freshworks.com/display/~ramkumar.ramani) | Done | Unable to render Jira issues macro, execution error. |
| Core - Option to associate multiple sales accounts to contacts - Phase 1  [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) [Ashish Muralidharan](https://confluence.freshworks.com/display/~ashish.muralidharan) | Done | Unable to render Jira issues macro, execution error. |
| Import - Allow contacts phone no. to be used in related contacts for deal import  [Ankita Tandel](https://confluence.freshworks.com/display/~ankita.tandel) | In QA | Unable to render Jira issues macro, execution error. |
| Core - Unequal assignment of owners in territory through round robin  [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) | Done | Unable to render Jira issues macro, execution error. |

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

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| Metric | Oct 5 - Nov 18 | Since Aug 22 - Oct 5 | July 2018 | June 2018 | May 2018 | April 2018 | March 2018 | Feb 2018 | Jan 2018 | Dec 2017 |
| Features shipped | 2 | 3 | 4 | 2 | 1 | 2 | 3 | 4 | 3 | 1 |
| Number of JIRA items resolved | 43 | 25 | 13 | 15 | 20 | 28 | 33 | 28 | 34 | 10 |
| Test cases automated - RSpec coverage | 59% | 59% |  |  |  |  |  |  |  |  |
| Number of UI test cases automated | 41  So far, ~70% coverage for P0 and P1 | 30 | 15 | 24 | 18 | 4 | 4 | 71 |  |  |

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

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| Goal | Deliverables |
| Integration - Custom sync between Marketo and Freshsales  [Bhuvanesh Babu](https://confluence.freshworks.com/display/~bhuvanesh.babu) | Unable to render Jira issues macro, execution error. |
| Core - Multicurrency - V2 [Aravinth Chandran](https://confluence.freshworks.com/display/~aravinthchandran) |  |
| Core - Hover card - V2 [Nivedita Peddiraju](https://confluence.freshworks.com/display/~nivedita.peddiraju) |  |
| Core - Implicit lead score optimization in Import - Tech Debt[Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) | Unable to render Jira issues macro, execution error. |
| Import - CSV import optimization - Tech Debt  [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) | Unable to render Jira issues macro, execution error. |
| Migration - Optimization - Tech Debt  [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) | Unable to render Jira issues macro, execution error. |
| Import - Option to skip duplicate records during lead/contact import  [Ankita Tandel](https://confluence.freshworks.com/display/~ankita.tandel) | Unable to render Jira issues macro, execution error. |
| Rspec - Improve coverage to 70% by Q4.  @all |  |

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| Stretch goal | Deliverables |
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## **Identified risks**

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| Risk | Ask | Recurring |
| Freshpipe | 1. Stability in current syncs(Freshdesk/Mailchimp/Hubspot) that are already supported. (<5 support tickets per month) 2. Ability to build new syncs where product should own 95% of the work. Expected ownership: 95% Current ownership: < 50% 3. Building new enhancements or fixing issues should take less time. Expected: Few hours to few days Current: 3+ weeks |  |
| Freshpipe | GDPR compliance. |  |

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

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| Ask | Impact | Recurring |
| Freshpipe | EUC support and EUC Pod |  |

## **Peer appreciation**

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| Name | Appreciated by | Impact |
| [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) |  | Since joining, in a shorten span, he has been able to ramp up on all areas of product and emerged as a strong contributor.   * Marketplace Launch * Support for Presales for Marketplace app development * Tech debts |
| [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) |  | Have contributed immensely in the past month. 15 commits so far. |

## **Plan/Roadmap/Vision - that extends beyond one month (or) next Aspirations**

* Marketplace - Completion of listing 100 Marketplace apps
* Marketplace - Incremental framework support
* Core - Sales goals
* Core - Unified sales activity view
* CSV import and CRM Migration - Features and Enhancements
* Integrations - Freshmarketer - Session Replay
* Integrations - Docusign
* Integrations - Freshpipe - To bring down the list of issues to less than 5 and have a good portion of control from our side for deployments