# Title: Squad 1 - Q1 2019 Aspirations

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| **Aspirations - Q1 - 2019** Freshsales, Squad 1 - 22 Jan 2019 |
| 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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**Welcome**

Pendry Sahithi

PujaBarathi Nagarajan

Illakia Varatharaj

## **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 - Mid Q4 2018 Aspirations](https://confluence.freshworks.com/display/freshsales/Squad+1+-+Mid+Q4+2018+Aspirations)

## **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) [Guruprasath V](https://confluence.freshworks.com/display/~guruprasath.v) | Done | Unable to render Jira issues macro, execution error. |
| **Core - Multi currency support**  [Aravinth Chandran](https://confluence.freshworks.com/display/~aravinthchandran) [Gayathri Rukmadhavan](https://confluence.freshworks.com/display/~gayathri.rukmadhavan) | Done | Unable to render Jira issues macro, execution error. |
| Core - Hover card - V2 [Nivedita Peddiraju](https://confluence.freshworks.com/display/~nivedita.peddiraju) @sathish | Done | Unable to render Jira issues macro, execution error. |
| **Core - Option to associate multiple sales accounts to contacts**  [Ashish Muralidharan](https://confluence.freshworks.com/display/~ashish.muralidharan) [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) [Gayathri Rukmadhavan](https://confluence.freshworks.com/display/~gayathri.rukmadhavan) | Done | Unable to render Jira issues macro, execution error. |
| **Import - CSV import optimization - Tech Debt**  [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) | Done | Unable to render Jira issues macro, execution error. |
| **Migration - Optimization - Tech Debt**  [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) | Done | Unable to render Jira issues macro, execution error. |
| Core - Implicit lead score optimization in Import - Tech Debt[Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) [Gowthaman Ravindran](https://confluence.freshworks.com/display/~gowthaman.ravindran) | Done | Unable to render Jira issues macro, execution error. |
| Core - Multiple import restriction [Irfan Shaik](https://confluence.freshworks.com/display/~irfan.shaik) | Done | Unable to render Jira issues macro, execution error. |
| Core - Multicurrency - V2 [Aravinth Chandran](https://confluence.freshworks.com/display/~aravinthchandran) | In progress | Unable to render Jira issues macro, execution error. |
| **Rspec - Improve coverage to 70% by Q4**.  @all | Almost Done. We are at 69.05% now. |  |
| **Core - Onboard central publisher gem to push backend events from Freshsales to Central**  [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) | In QA | 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) [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) | In QA | Unable to render Jira issues macro, execution error. |
| Migration - CLI tool for migrating data for GTM | In QA |  |

## **Success metric trend**

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| Metric | Since Nov 19 - Till now | 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 | 3 | 2 | 3 | 4 | 2 | 1 | 2 | 3 | 4 | 3 | 1 |
| Number of JIRA items resolved | 44 | 43 | 25 | 13 | 15 | 20 | 28 | 33 | 28 | 34 | 10 |
| Test cases automated - RSpec coverage | ~69% | 59% | 59% |  |  |  |  |  |  |  |  |
| Number of UI test cases automated | 18  ~ 64.43% coverage for P0 and P1 | 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 | Status | Deliverables |
| Integration - Custom sync between Marketo and Freshsales | Yet to start | 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) [Praveenkumar Varadan](https://confluence.freshworks.com/display/~praveenkumar.varadan) | In progress |  |
| Core - Enhancements to Multiple sales accounts of contacts.  [Ashish Muralidharan](https://confluence.freshworks.com/display/~ashish.muralidharan) | In progress | Unable to render Jira issues macro, execution error. |
| Core - updated\_at since filter support in index api of sales activities  [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) | In QA | Unable to render Jira issues macro, execution error. |
| **Core - Sales goals**  [Vaidhyanathan Ananthakrishnan](https://confluence.freshworks.com/display/~vaidhyanathan.ananthakrishnan) | Yet to start | Unable to render Jira issues macro, execution error. |
| Core - Allow sales activities to be scheduled in future  [Nivedita Peddiraju](https://confluence.freshworks.com/display/~nivedita.peddiraju) | In progress | Unable to render Jira issues macro, execution error. |
| **Integration - Docusign** [Arun Infant Ignatius](https://confluence.freshworks.com/display/~arun.ignatius) [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) | In progress | Unable to render Jira issues macro, execution error. |
| **Core - Make unique fields customisable** [Irfan Shaik](https://confluence.freshworks.com/display/~irfan.shaik) | Yet to start |  |
| Integration - Adapting New Gallery View [Shaik Buden Saheb](https://confluence.freshworks.com/display/~shaikb) | In QA | Unable to render Jira issues macro, execution error. |
| Core - Recycle bin [Ayush Kalani](https://confluence.freshworks.com/display/~ayush.kalani) | Yet to start |  |

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

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| Risk | Ask | 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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## **Top contributors**

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| --- | --- |
| Name | Impact |
| Ashish, Praveen, Gayathri, Bhuvanesh | Multiple sales accounts for Contacts |
| Vaidhy | Tech debts |

## **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
* Integration - Pandadoc
* Smart notifications v1
* Import for task/appointments/notes/sales activities