# Title: Squad 2 - February 2018 Aspirations

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| **Aspirations - Feb 2018** Freshsales, Squad 2, 07/02/2018 |
| Mission:   * Create a happy squad * Provide better reporting in CRM space * Continue evolving integrated phone as USP of Freshsales * Powerful automations - Workflow * Plans & billings |

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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 |
| Workflow Automation - Periodic trigger | Done | Unable to render Jira issues macro, execution error. |
| Plans & Pricing change | Done | Unable to render Jira issues macro, execution error. |
| Multi currecy support (INR) | Done | Unable to render Jira issues macro, execution error. |
| Custom report revamp | Done | Unable to render Jira issues macro, execution error. |
| Dashboards - Metrics included in PDF export | Done | Unable to render Jira issues macro, execution error. |
| CSV format support in schedule reports | Done | Unable to render Jira issues macro, execution error. |

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

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| --- | --- |
| Metric | Trend |
| Number of Jira items resolved | 75 |
| Number of test cases automated (high + critical) | 45 - Done. 206 - Pending |

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

|  |  |
| --- | --- |
| Name | Contribution |
| Kathir | Plans & Pricing change  Multicurrecy support (INR) |
| Vasutha | Custom report revamp |

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

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

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

|  |  |
| --- | --- |
| Goal | Deliverables |
| Custom reports cross module   * Deal & Contact * Deal & Account |  |
| Workflow   * Bring operator like is\_changed * Adding more actions like create lead/contact/sales account/deal, convert lead etc., |  |
| Plans & billing - support few more currencies |  |

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

## **Identified risks**

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| --- | --- | --- |
| Risk | Mitigation strategy | Recurring |
|  |  |  |
|  |  |  |

## **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**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Appreciated by | Impact | In their own words |
|  |  |  | "(s)he did a great job and it resulted in ..." |
|  |  |  |  |

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

* Ability to clone reports
* Role and Scope based report data access

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

* Please add additional items as you see fit
* . . .

## **Finally**

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