# Title: Squad 2 - July 2018 Aspirations



|  |
| --- |
| **Aspirations - July 2018** Freshsales, Squad 206 Jul 2018 |
| Mission:   * Provide better reporting in CRM space * Continue evolving integrated phone as USP of Freshsales * Powerful automations - Workflow * Plans & billings |

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Name** | **Email** | **Git home (if applicable)** |
| **Tech Lead** | Sivalingam | [sivalingam.selvasekaran@freshworks.com](mailto:sivalingam.selvasekaran@freshworks.com) |  |
| **Squad Lead** | Manikandan | [manikandan.subramaniam@freshworks.com](mailto:manikandan.subramaniam@freshworks.com) |  |
| **Product Owner** | Aditi | [aditi.balaji@freshworks.com](mailto:aditi.balaji@freshworks.com) |  |
|  | Swati | [swati.sharma@freshworks.com](mailto:swati.sharma@freshworks.com) |  |
| **Members** | Kathirvalavan | [kathirvalavan.soundarajan@freshworks.com](mailto:kathirvalavan.soundarajan@freshworks.com) |  |
|  | Bhuvanesh | [bhuvanesh.babu@freshworks.com](mailto:bhuvanesh.babu@freshworks.com) |  |
|  | Rohan | [rohan.anand@freshworks.com](mailto:rohan.anand@freshworks.com) |  |
|  | Ramkumar | [ramkumar.ramani@freshworks.com](mailto:ramkumar.ramani@freshworks.com) |  |
|  | Mudhabir | [mudhabir.ahmed@freshworks.com](mailto:mudhabir.ahmed@freshworks.com) |  |

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

|  |
| --- |
| 1. Features shipped 2. Number of Jira items resolved |

## **Previous Aspirations Link:**

[**Squad 2 - June 2018 Aspiration**](https://confluence.freshworks.com/pages/viewpage.action?pageId=191628537)

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

|  |  |  |
| --- | --- | --- |
| Goal (from previous Aspirations) | Results | Deliverables |
| Multiselect field support in custom report | Done |  |
| Missing fields in custom report | Done |  |
| By default, schedule a report for all new users | Done |  |
| Allow task due date to be today in workflow actions | Done |  |
| Creating Workflows based on "Email Status", "Expected Close date" | Done |  |
| Option to create new report from an empty dashboard block | QA |  |
| Option to save and create new report | QA |  |
| Automation for Multi-select field |  |  |

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

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Metric | June 2018 | May 2018 | April 2018 |  |  |  |  |
| Features shipped | 1 | 1 | 3 |  |  |  |  |
| Number of Jira items resolved | 87 | 57 | 37 |  |  |  |  |
| Number of test cases automated | - | - | 10 |  |  |  |  |

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

|  |  |
| --- | --- |
| Name | Contribution |
| Ramkumar | Done multi select & Added missing fields in custom report very effectively |

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

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

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

|  |  |
| --- | --- |
| Goal | Deliverables |
| Reports   * Option to schedule while creating reports and dashboards * Sharing reports and dashboards with selected users * Scoping in reports: Applying Global, Restricted and Territory access to report data |  |
| Workflow   * Adding convert lead action * Support hours in due date of Task Action * Allow updating properties with related record's value * Include missing fields * UI Improvements |  |
| Phone Call   * Freshcaller integration |  |
| Automation   * On custom reports, Workflow and Dashboard enhancements |  |

|  |  |
| --- | --- |
| Stretch goal | Deliverables |
| AUTOMATION - Complete automation for Phone cases (including Freshcaller adaption) |  |

## **Identified risks**

|  |  |  |
| --- | --- | --- |
| 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 |
|  |  |  |  |

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

* UI/UX improvements across reports

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