# Title: Squad 2 - June 2018 Aspirations

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| **Aspirations - June 2018** Freshsales, Squad 205 Jun 2018 |
| Mission:   * 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:**

[**Squad 2 - May 2018 Aspiration**](https://confluence.freshworks.com/pages/viewpage.action?pageId=189236797)

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

|  |  |  |
| --- | --- | --- |
| Goal (from previous Aspirations) | Results | Deliverables |
| Support to show currency in custom report chart | Done |  |
| is\_changed operator introduced for date & date\_time fields in workflow | Done |  |
| GDPR Changes in Phone - Live Call recording | Done |  |
| Tooltip for long chart legends | Done |  |
| Encrypt the password and API key in workflow webhooks | Done |  |
| Signature in emails triggered via workflows | Done |  |
| Deletion of reports restricted for non-owners | Done |  |
| Restrict access to visibility modification in reports for non-owners | Done |  |
| Don't allow export of reports for some users | Done |  |
| Support "Deal stage updated at" field in workflow conditions | Done |  |
| Custom Report : Increase filter condition limit to 10 | Done |  |
| Workflows based on "Email Status" | Done |  |
| Include call recordings s3 link in the Account export file | Done |  |
| Multi select field support in custom report | Branch Testing |  |
| AUTOMATION - POC for Phone module | Completed | [Ezaki](https://confluence.freshworks.com/display/~esaki) |

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

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Metric | May 2018 | April 2018 | March 2018 |  |  |  |  |
| Features shipped | 1 | 3 | 2 |  |  |  |  |
| Number of Jira items resolved | 57 | 37 | 40 |  |  |  |  |
| Number of test cases automated | ~ | 10 | 73 |  |  |  |  |

* Only script modifications were done for the current month, based on bug fixes and enhancements.

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

|  |  |
| --- | --- |
| Name | Contribution |
|  |  |

## **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 |  |
| Workflow   * Adding more actions like create lead/contact/sales account/deal, convert lead etc., |  |
| Phone Call   * Freshcaller integration |  |
|  |  |

|  |  |
| --- | --- |
| 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 |
|  |  |  | "(s)he did a great job and it resulted in ..." |

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

* Apply territory and restricted access on reports data
* UI/UX improvements across reports

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