# Title: Squad 2 - March 2018 Aspirations

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| **Aspirations - Mar 2018** Freshsales, Squad 2, 07/03/2018 |
| 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:**

[**Squad 2 - February 2018 Aspirations**](https://confluence.freshworks.com/pages/viewpage.action?pageId=94273669)

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

|  |  |  |
| --- | --- | --- |
| Goal (from previous Aspirations) | Results | Deliverables |
| Cross module reports  Deals & Contacts  Deals & Accounts | Done | <https://github.com/freshdesk/freshsales/commit/06f61abeab4e707d9a4587aabaf00c20cb2ec0a9> |
| Cross module reports to dashboards with metrics | Done | <https://github.com/freshdesk/freshsales/commit/215dd4d8c1b7f0aee77c55c414ac66f9f922530a> |
| Schedule Export of reports in CSV format | Done | <https://github.com/freshdesk/freshsales/commit/e09c0bab45c98d5dc55c596f703b01e8a939a49a> |
| Reports access to users | Done | <https://github.com/freshdesk/freshsales/commit/ab887a08239be24618d9b6309acd063dced8e82a> |
| External email addresses in schedule report mails | Done | <https://github.com/freshdesk/freshsales/commit/1ab7170ad205421b7ccca6d507b8b5628f7ce27d> |
| Multi currecy support (EUR, ZAR, GBP, AUD) | Done | <https://github.com/freshdesk/freshsales/commit/6d25ec2c4157c112fde4370edf91e26f4afa3e58> |
| Workflow -  is\_changed operator | Done | <https://github.com/freshdesk/freshsales/commit/6688a4ef7a8565d1a67e1b4dc1d1524334dd67ac> |

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

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| --- | --- |
| Metric | Trend |
| Features shipped | 1 |
| Number of Jira items resolved | 75 |
| Number of test cases automated (high + critical) | 37 - Done. (Workflow automation)  141 - Pending. (Call log - 8; Phone conv - 8; Phone settings - 35; Reports - 76) |

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

|  |  |
| --- | --- |
| Name | Contribution |
| Praveen, Sivalingam, Vasutha | Cross module reports |

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

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

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

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| --- | --- |
| Goal | Deliverables |
| Reports   * Ability to clone reports * Multi select field support |  |
| Workflow   * Adding more actions like create lead/contact/sales account/deal, convert lead etc., |  |
| Freshsales - Freshcaller Integration |  |

|  |  |
| --- | --- |
| 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**

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

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

## **Finally**

Copy this page's link in [2018-February](https://confluence.freshworks.com/pages/viewpage.action?pageId=64028673) page