# Title: Squad 2 - May 2018 Aspirations

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| **Aspirations - May 2018** Freshsales, Squad 208 May 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 - April 2018 Aspiration**](https://confluence.freshworks.com/pages/viewpage.action?pageId=187500170)

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

|  |  |  |
| --- | --- | --- |
| Goal (from previous Aspirations) | Results | Deliverables |
| Text area support in custom report | Done |  |
| Allowing user to modify file name on upload in document attachment | Done |  |
| Add refresh option in dashboard to bring real time data | Done |  |
| Linkify URL in report data | Done |  |
| Added lead score and lead quality in workflow webhook | Done |  |
| Phone numbers added in workflow filter | Done |  |
| Support to show currency in custom report chart | QA |  |
| is\_changed operator introduced for date & date\_time fields in workflow | QA |  |
| GDPR Changes in Phone - Live Call recording | Branch Testing |  |
| Multi select field support in custom report | Branch Testing |  |

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

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Metric | April 2018 | March 2018 | Feb 2018 |  |  |  |  |
| Features shipped | 3 | 2 | 1 |  |  |  |  |
| Number of Jira items resolved | 37 | 40 | 75 |  |  |  |  |
| Number of test cases automated | 10 | 73 | 120 |  |  |  |  |

* Only spill-over cases were completed for the current month.

## **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   * Restrict report export for users * Restrict access to visibility modification for non-owners |  |
| Workflow   * Adding more actions like create lead/contact/sales account/deal, convert lead etc., * Email signature in workflows |  |
| Phone Call   * Freshcaller integration |  |
| AUTOMATION - POC for Phone module |  |

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

## **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
* 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