# Title: Squad 2 - Q4 2018 Aspirations



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| **Aspirations - Q4 2018** Freshsales, Squad 205 Oct 2018 |
| Mission:   * Provide better reporting in CRM space * Continue evolving integrated phone in Freshsales * Powerful automations - Workflow, Sales Campaign * Plans & billings |

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

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| 1. Features shipped 2. Number of Jira items resolved 3. Test cases automated - RSpec coverage 4. Number of UI test cases automated |

## **Previous Aspirations Link:**

[**Squad 2 - August 2018 Aspiration**](https://confluence.freshworks.com/pages/viewpage.action?pageId=196872099)

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

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| --- | --- | --- |
| Goal (from previous Aspirations) | Results | Deliverables |
| Adding convert lead action in workflow automation | Done | Unable to render Jira issues macro, execution error. |
| Shareable Reports and Dashboards - by users, by territories | Done | Unable to render Jira issues macro, execution error. |
| Reference Field in Workflow property update action | Done | Unable to render Jira issues macro, execution error. |
| Support future date filters for task due date and appointment start & end date in reports | Done | Unable to render Jira issues macro, execution error. |
| Change EU & GBP Pricing | Done | Unable to render Jira issues macro, execution error. |
| Report & Dashboard Email UI enhancement (schedule & export) | Done | Unable to render Jira issues macro, execution error. |
| Ability to change billing currency of a account on Admin-console | Done | Unable to render Jira issues macro, execution error. |
| is empty operator introduced in workflow date fields in filter | Done | Unable to render Jira issues macro, execution error. |
| Exposing converted leads as grouping field in custom reports | Done | Unable to render Jira issues macro, execution error. |
| Freshcaller integration | In QA | Unable to render Jira issues macro, execution error. |

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

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| --- | --- | --- | --- |
| Metric | Since Last Aspirations | July 2018 | June 2018 |
| Features shipped | 3 | 1 | 1 |
| Number of Jira items resolved | 40 | 67 | 87 |
| Test cases automated - RSpec coverage | 36 % |  |  |
| Number of test cases automated (Newly added cases) | 58 | - | - |
| Automation coverage (High & critical) | 53 % |  |  |

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

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| --- | --- |
| Goal | Deliverables |
| Sales Campaign : Remove duplicate lead  [Sivalingam Selvasekaran](https://confluence.freshworks.com/display/~sivalingam.selvasekaran) |  |
| Sales Campaign : Reduce campaign processing time  [Sivalingam Selvasekaran](https://confluence.freshworks.com/display/~sivalingam.selvasekaran) |  |
| Freshreport : Report platform migration  [Sivalingam Selvasekaran](https://confluence.freshworks.com/display/~sivalingam.selvasekaran) [Ayush Kalani](https://confluence.freshworks.com/display/~ayush.kalani) |  |
| Sales Campaign : Trigger based campaign  [Sivalingam Selvasekaran](https://confluence.freshworks.com/display/~sivalingam.selvasekaran) [Prakash Thiyagarajan](https://confluence.freshworks.com/display/~prakash.thiyagarajan) [Lakshmisai Varshitha](https://confluence.freshworks.com/display/~lakshmisai.varshitha) |  |
| Automation : Complete Freshcaller Integration  [Senthil vel](https://confluence.freshworks.com/display/~senthilvelp) |  |
| Marketplace enhancements [Bhuvanesh Babu](https://confluence.freshworks.com/display/~bhuvanesh.babu) |  |
| SMS integration  [Rohan Anand](https://confluence.freshworks.com/display/~rohan.anand) |  |
| Migrate existing freshsales phone customer to freshcaller  [Kathirvalavan S](https://confluence.freshworks.com/display/~kathirvalavan) |  |
| Rspec - Improve coverage to 45% by Q4.  @all |  |

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

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| --- | --- |
| Name | Contribution |
| Rohan | For implementing more workflow actions (Convert lead, Reference field update) |

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

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| Issue | Root cause | Recurring |
| Workflow automation : Email not sent when owner assigned through territory | **Active Record Caching** - Active record was returning old cache value even though owner is updated. | No |

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| Stretch goal | Deliverables |
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## **Identified risks**

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| Risk | Mitigation strategy | Recurring |
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## **Do you have any specific asks? (any help needed to address constraints, unblocking, ...)**

**(Please keep this list engineering related - this section is optional)**

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| --- | --- | --- |
| Ask | Impact | Recurring |
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## **Peer appreciation**

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| Name | Appreciated by | Impact | In their own words |
|  |  |  |  |

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

* freshreport platform migration

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