# Title: freshsales: P& E -Monthly Operational Meeting - Jan 2020

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| Date | 28 Jan 2020 |
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**AGENDA :**

**Current product usage metrics**

* Product usage metrics
  1. <https://heapanalytics.com/app/dashboard/Feature-Adoption-Monthly-1913>
  2. <https://heapanalytics.com/app/dashboard/Active-Customers-Report-2453>
* Mid market account adoption
* Marketplace metrics
  + <https://baikal.freshworks.com/hue/editor?editor=262679>
  + Summary

![](data:text/html;base64,)

**Product Backlog**

* Product Q1 2020 Backlog
  1. <https://freshworks.freshrelease.com/FSALES/reports> - > Q1'20 Backlog
  2. <https://freshworks.freshrelease.com/FRS/roadmap> → Freddy Backlog

**Product committed vs completed**

1. <https://freshworks.freshrelease.com/FSALES/reports> - > Q1'20 Backlog/ Operation meeting report

**Bugs**

Current outstanding open bug backlog and rolling 12 month trend by age(less than 30 days, 30-90 days, 12 months, over 12 months)

##### **Reference**[**https://freshworks.freshrelease.com/FSALES/reports**](https://freshworks.freshrelease.com/FSALES/reports)**- Page 2**

![](data:text/html;base64,)

**Customer Support Issues**

[**https://support.freshdesk.com/a/analytics**](https://support.freshdesk.com/a/analytics)**- Page 2**

**Mid market readiness**

[Mid-market Readiness](/pages/createpage.action?spaceKey=FWE&title=Mid-market+Readiness)

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|  | [API Maturity Level](https://confluence.freshworks.com/display/C3PS/API+Maturity+model) | [AppSec & Compliance Maturity level](https://confluence.freshworks.com/pages/viewpage.action?pageId=210020448) | [Geo readiness](https://confluence.freshworks.com/display/C3PS/Geo+Readiness)  (DC.i18n) | [Marketplace / Extensibility maturity level](https://confluence.freshworks.com/display/C3PS/Marketplace+Maturity) | [Migrations](https://confluence.freshworks.com/display/C3PS/Migrations+Maturity+Levels) | [DelightMetrics](https://confluence.freshworks.com/display/C3PS/Delight+metrics) | [Enterprise SLAs](https://confluence.freshworks.com/display/C3PS/Enterprise+SLAs) |
| Freshsales | Level 2 | Level 2 | 4.34 | Level 3 | Level 3 | Level 2 | - |

**SLA and SLO**

##### Availability - <http://status.freshsales.io/check/42561?timefilter=2160>

##### Delight Metrics

![](data:text/html;base64,)

**Product marketing** - Q1 plan

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| --- | --- | --- |
| **Objectives** | **Activities** | **Estimated Release** |
| Feature Adoption - Trial   * Account activation * Connect inbox * Data import * Adding team members | * Fix onboarding flows * Trial emails to move to Freshmarketer * Demo/Set up video | Q1 |
| Feature Adoption - Paid | * 30-60-90-180 post-purchase journeys * Webinars for productivity use cases * Use case documents and blogs * Admin and user guides     Videos for:  -Customizing Freshsales  -Analytics (Freshreports)  -Integration videos for Freshdesk, Freshchat, & Freshmarketer  -Migration from different CRMs | Q1, Q2 |
| New feature launches   * CPQ * Sales 360 Beta * Freddy Deal insights Lite (for low data) * Freddy OOO detection * Admin settings for Freddy skills * Home page v2 (with Freddy suggestions) * Map view in mobile * Forecasting | GTM activities   * Pre-launch, launch and post-launch | Q1, Q2 |
| Sales Training | * MM - Training for all MM AEs as the sales structure has changed. At least one Sales Enablement/ICP meeting with all AEs by end of Q1. * Cross-sell training for existing EP team * SDR Training | Q1, Q2 |
| Messaging and Positioning | * Freshworks CRM =FSA+FM website ( New Home Page) * How to Win in SaaS - Thought Leadership series | Q1 |
| Analyst Relations | * Gartner MQ | Q1 and Q2 |
| Sales Enablement | As per Sales Enablement sheet shared at SKO | Q1, Q2 |
| Win-Loss Analysis | **Win:**  Top 20 MM customer survey   * Key Features * Use cases * Org Outcomes/Results (Increase in revenue, inc. in productivity) * Transfer learnings across sales teams   **Loss:**   * Reasons we lost a deal * Transfer learnings across sales teams | Q1, Q2 |
| FSA-FM customer experience | **Trial:**   * Adding Marketer to FSA onboarding flow   **Existing customers**   * Combining Estate and Forest FSA and FM Estate and Forest post-purchase | Q1 |

**Freddy**

backlog and committed vs completed

1. [Freddy Freshsales - Monthly Operational Meeting](https://confluence.freshworks.com/pages/viewpage.action?pageId=237144275)
2. <https://freshworks.freshrelease.com/FRS/roadmap>

### Committed vs Completed

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| --- | --- | --- | --- | --- | --- |
| Epic | Description | Milestone for Jan 2020 | Milestone dates | Status | Comments |
| [FreshReports](https://freshworks.freshrelease.com/FSALES/issues/FSALES-17183) | Integrate freshreports analytics with freshsales | GA for all Forest and Estate customers in EUC pod | 22 Jan 2020 | RED | This GA mile stone was missed because of a change request from PM on 16 Jan 2020.  In the final demo PM requested the data level scoping to be included in this GA.   i2P for the data scoping is in progress. ETA for ETA will be provided by 29 Jan 2020 |
| GA to all Forest  and Estate customers in US pod | 27 Jan 2020 | RED | same as above. |
| [CPQ](https://freshworks.freshrelease.com/FSALES/issues/FSALES-14008) | CPQ (Configure, Price, Quote) will be an add on product in freshsales to enable freshsales customers to create products and quotations. | Product creation capability. | 28 Jan 2020 | ON TRACK | Demo is planned for January 28, 2020. Two squads, Petta and Sleeper cells, are working on this. Create product functionality will be in the demo.  For more details - <https://freshworks.freshrelease.com/FSALES/reports> |
| [Sales 360](https://freshworks.freshrelease.com/FSALES/issues/FSALES-16491) | Program Bugatti is to deliver high quality Customer Preview  Version of Sales 360 using FreshSales as the anchor product by 31st March 2020 | MCR Sync | 12 Feb 2020 | RED | No milestone for Jan  Internal grooming and dependency resolution  Refer : [Sales 360 - CRM BU - Weekly Status Report - 28th Jan 2020 - (Program Bugatti)](https://confluence.freshworks.com/pages/viewpage.action?pageId=237142996) |
|  |  | UFX Integration | 13 Feb 2020 | RED |  |
| [Corcoran UAT Items](https://freshworks.freshrelease.com/FSALES/issues/FSALES-17470) | Deliver the required Feature enhancements/Defects/New features from Corcoran UAT | To deliver 12 enhancement items | 15 Jan 2020 | RED | 8 out of 12 enhancements shipped  Key Enhancements shipped -   * Dashboard related changes * Email Control UI * Bulk Email changes   Tagged using - <https://freshworks.freshrelease.com/FSALES/issues/filter/21249>  Reason for slippage : [Manikandan Subramaniam](https://confluence.freshworks.com/display/~manikandan.subramaniam) |
|  | To deliver 15 enhancements in Jan 30th | 30 Jan 2020 | ON TRACK |  |
| Tech Debt Items | Migrate Rails from 3.2 to 4.0 | Migration of code from rails 3.2 to 4.0 | 12 Feb 2020 | YELLOW | Development work is on track. QA memebrs of the squad have Corcoran and Sales 360 as priority. Need to get QA members from other squads to verify this |
|  | Addressing racing issue due to BG jobs | Serializing several Sidekiq workers | 31 Jan 2020 | ON TRACK | By serializing the workers,      1. Update queries will be reduced      2. Cascading of worker jobs will be reduced.      3. Issues related to RACE condition will be reduced.  <https://freshworks.freshrelease.com/FSALES/issues/FSALES-6246> |
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### Automation Coverage

| Category | Automation% | Earlier Reference Numbers | Total number of test cases  (P0+P1) | Reference |
| --- | --- | --- | --- | --- |
| RSpec- Backend | As on Jan 23rd:  79.09% | As on Nov '19  72.9% | - | <https://freshsales.runwayci.com/job/freshsales-Staging/Backend_20Coverage/>  [Rspec coverage initiative](https://confluence.freshworks.com/display/freshsales/Rspec+coverage+initiative) |
| Automation-UI cases | 59.18 % |  | 6835 | Total number of P0+P1 cases - 6835  [Rspec coverage initiative](https://confluence.freshworks.com/display/freshsales/Rspec+coverage+initiative)  <https://freshworks.freshrelease.com/FSALES/tcm/test-cases> |
| Ember - FrontEnd cases | 46.82 % |  | - | <https://freshsales.runwayci.com/job/freshsales-Staging/Frontend_20Coverage/> |
| Mobile -ios | 24.7% |  | 469 | XCode UI was decided as the tool to be used for automation in Q1 2019 |
| Mobile - Android | 6.25% |  | 400 | Espresso was decided as the tool to be used for automation after analysis  Automation was started in 2019 Q4 with the n |

**Proposed Items for the Next Meeting**

Number of Hotfixes released

Security Vulnerability Metrics