Scope Definition: User Stories

Area 1. Trial Management

1. **Trial Start After Onboarding (P1)**

   Story: As a **new user**, I want my trial to start only after I complete onboarding, so that I have the full trial period to explore the platform.

2. **Pre-Selected Plan Before Trial (P1)**

   Story: As a **new user**, I want to select my subscription plan from the pricing page before starting my trial or after the trial ends, so that my trial aligns with the features of that plan.

3. **Credit Card Request Before Trial (P2)**

   Story: As a **new user**, I want to optionally provide my credit card information before the trial starts without being charged, so that the billing transition is seamless if I decide to subscribe.

4. **CSM Trial Extension (P2)**

   Story: As a **CSM**, I want the ability to extend a user's trial for a specified number of days, so that I can support users who need more time evaluating the product.

5. **Trial Notification & Countdown (P2)**

   Story: As a **new user**, I want to see how many days are left in my trial, so that I am aware of the expiration date and can decide whether to subscribe.

6. **Trial Expiration & Deactivation (P1)**

   Story: As a **user**, once my trial period ends, I should no longer have access to the app, so that I can't continue using paid features without a valid subscription.

   Story: As the **system**, I want to automatically deactivate the user's account one month after the trial ends if they haven't subscribed, so that inactive accounts are cleaned up.

7. **Re-Start Past Trial (P3)**

   Story: As a **user who has previously completed a trial**, I want the ability to re-start or receive an additional trial under specific conditions, so that I can re-evaluate the product.

8. **Re-Entry to Funnel After Deactivation (P3)**

Story: As a **user with a deactivated account**, I want to be allowed to reenter the funnel as a net new user after 3 months, so that I can sign up for a new trial and reevaluate the product.

Area 2. Subscription Management

1. **Pause and Unpause Subscription (P1)**

   Story: As a **subscriber**, I want to pause my subscription and resume it later, so that I can temporarily stop usage and billing when I don't need the service.

2. **Switch Between Subscription Plans (P1)**

   Story: As a **subscriber**, I want to switch to a different subscription plan, so that I can adjust my plan based on my evolving needs.

3. **Plan Configuration (Add/Remove Team Members) (P1)**

   Story: As a **subscriber**, I want to add or remove team members, so that my billing and features reflect the actual number of active users on my account.

4. **Scheduled Downgrade (P2)**

   Story: As a **subscriber**, I want to schedule a plan downgrade to take effect at the next billing cycle, so that I'm not immediately impacted mid-cycle.

5. **Cancel Scheduled Downgrade (P2)**

   Story: As a **subscriber**, I want to see my upcoming plan changes and cancel a scheduled downgrade if I change my mind, so that my plan remains unchanged if I decide not to downgrade.

6. **Cancellation & Reversal (P1)**

   Story: As a **subscriber**, I want to cancel my subscription and retain the ability to revert my decision before the cancellation date, so that I can maintain service if I change my mind.

7. **Re-Subscribe After Cancellation** *(P3)*

   Story: As a **user**, I want to quickly re-subscribe if I have previously canceled, so that I can resume service without going through all setup steps.

8. **View Next Billing Date & Amount** (P2)

   Story: As a **subscriber**, I want to see my upcoming billing date and the projected amount, so that I know when and how much I will be charged.

9. Account Data Deletion (P2)

Story: As a subscriber, I want to delete all my account data when I cancel my subscription.

Area 3. Billing & Payment

1. **Immediate Billing for Upgrades (P1)**

   Story: As a **subscriber**, I want to be charged immediately for any plan or seat upgrades, so that I can access the new features right away.

2. **Delayed Billing for Downgrades (P1)**

   Story: As a **subscriber**, I want plan downgrades or seat reductions to take effect at the next billing cycle, so that the current cycle is not disrupted.

3. **Pro-Rated Billing (P1)**

   Story: As a **subscriber**, I want my charges to be pro-rated for mid-cycle changes (e.g., adding seats), so that I pay a fair amount.

4. **Tax Calculation (P1)**

   Story: As a **subscriber**, I want taxes to be accurately calculated based on my company's state or province, so that my invoice complies with local tax laws.

5. **Receipt Recipients (P2)**

   Story: As a **subscriber**, I want to specify additional email addresses (e.g., my accountant) to receive billing receipts, so that the right stakeholders have the payment records.

6. **Monthly vs. Annual Billing (P1)**

   Story: As a **subscriber**, I want to choose between a monthly plan or an annual plan with a discount.

7. **Update Payment Method (P2)**

   Story: As a **subscriber**, I want to update or change my payment method at any point, so that I can ensure successful and uninterrupted billing.

8. **Billing History & Invoices (P2)**

   Story: As a **subscriber**, I want to view my billing history and download past invoices, so that I can keep track of payments.

9. **Refund / Partial Refund Issuing (P2)**

   Story: As a CSM or Sales rep, I can issue a refund or a partial refund to a customer.

Area 4. Discounts & Custom Plans

1. **Enter Discount Code (P2)**

   Story: As a **subscriber**, I want to enter a discount code that can be applied to my subscription (monthly or annual), whether one-time or recurring, so that I can benefit from special offers.

2. **Discount Code Creation by Sales (P2)**

   Story: As a **sales rep**, I want to create a discount code and associate it with an account along with an expiry date, so that I can offer targeted promotional deals.

3. **Custom Plan Creation by Admin/Sales (P2)**

   Story: As **sales or a product admin**, I want to create a custom plan with a unique SKU for enterprise deals, so that I can tailor the plan to a specific client's needs.

4. **Assign Custom Plan to Account (P2)**

   Story: As **sales or a product admin**, I want to assign a custom enterprise plan to an account, so that the user can subscribe to a unique set of features and pricing.

Area 5. Analytics & Revenue Tracking

1. **Subscription Metrics (MRR, ARR, Churn) (P1)**

   Story: As finance, I want to track subscription metrics like monthly recurring revenue (MRR), annual recurring revenue (ARR), upcoming cancelations, and churn rate.

2. **Funnel Analytics (Trial to Paid Conversions) (P1)**

   Story: As product, I want visibility into trial start counts, trial completions, and how many convert to paid subscriptions, so that I can optimize the user acquisition funnel.

3. **Revenue Reporting by Plan (P2)**

   Story: As finance, I want to see a monthly or quarterly breakdown of revenue by subscription plan (including enterprise/custom plans), so that I can forecast and analyze revenue streams.

4. **Active vs. Deactivated Account Analytics (P2)**

   Story: As a **product manager**, I want to track how many accounts get deactivated after trials or cancellations, so that I can measure churn and potential re-engagement strategies.

5. **(Optional) Customer Lifetime Value (CLTV) (P3)**

Story: As finance, I want to measure the lifetime value of each account, so that I can identify high-value segments and upsell opportunities.

Area 6. Account Management & Reporting

1. **Usage Report for Client Billing (P2)**

   Story: As a **user**, I want to receive a report of my and my team's usage of Alexi, so that I can use it for my own client billing.

2. **Reminder Before Account Cancellation (P1)**

   Story: As a **user** attempting to cancel, I want to be reminded of my current usage or key actions on the platform, so that I can make an informed decision (pause vs. cancel).

3. **Team Management Access Control (P2)**

   Story: As an admin, I have the control for making changes to the subscription plan and billing information.

Area 7. Admin/CSM Management

1. **Admin Dashboard** *(P1)*

   Story: As an **admin/CSM**, I want a dashboard to see all active trials, subscriptions, and upcoming plan changes, so that I can proactively manage customers.

2. **Manually Adjust Billing** *(P1)*

   Story: As an **admin/CSM**, I want the ability to override or adjust a user's billing (e.g., refunds, credits) under special circumstances, so that I can handle exceptions.

Additional Clarifications:

1. **Grace Period Handling**: 30 days after the trial ends the account is de-activated.
2. **Notifications**: We send notifications for trial expiring, payment issues, or subscription changes are sent by email.
3. **Compliance & Security**: The 3rd party service should comply with leading security best practices
4. **Account Reactivation Flow**: For deactivated accounts, we should delete their documents after 30 days from trial or when the user explicitly asks that their documents be deleted.
5. **Limits on Re-Trials**: Clearly define business rules for how often a user can re-start or re-enter a trial.
6. **Double charging:** There were few instances of double charging, we don't know the root cause of this. Engineering should investigate and determine if this is one off or a gap in our billing system.

Success Metrics

1. **Trial Conversion Rate**
- **Definition**: \frac{\text{Number of trials converted to paid}}{\text{Total trials started}}
- **Why It Matters**: Measures how effectively the trial period and onboarding drive users to become paying customers.
2. **Trial Drop-Off Rate**
- **Definition**: \frac{\text{Number of users who abandon during onboarding or early usage}}{\text{Total trials started}}
- **Why It Matters**: Identifies friction points causing users to disengage before they experience the full value.
3. **Average Time to Conversion**
- **Definition**: The average number of days from trial start to subscription.
- **Why It Matters**: Helps determine if the trial length is optimized or if users convert earlier/later than expected.