

## POST SPRINT REVIEW REPORT

**We work in sprints.** This means in the long list of todos to deliver a project, this report will collate the five to six items due in one week. The project team must focus to close each deliverable to remain on track.

**How to use this file:** Download this in Excel or make a copy. Project coordinators must fill in the targets on a Thursday (start of the sprint), schedule a project coordinator meeting mid week and export this file as a PDF at the end of every sprint and uploaded to the Captivate Intranet on Basecamp.

Project Name	FGISC - CRM Rollout	Project Coordinator Name
Budget Source	[Captivate Client, Internal Project]	Anne Patricia Calsado
Report Date	[must be dated on a Wednesday prior to L10]	
Start Date:	7/10/2024	End Date: 7/17/2024

**Sprint target:** By the end of this sprint these are the target deliverables. These are taken from the schedule portion of Basecamp.

- 1 Identify other lead sources if an API connection is required in adding new leads to the CRM system
- 2 Invite additional testers to CRM as additional users + provide guide in advance
- 3 Identify how leads are assigned to teams by configuring territories with their respective teams.
- 4 Define the sales quota after defining the activity goals
- 5 List down the actions done by the sales teams (face to face meetings, e-mails, virtual meetings)
- 6

**Mid Week Discussion** By the middle of the week, the team has a discussion and these were clarifications made or items discussed.

[blockers, challenges, or nearly missed/ missed deadlines go here]

- 1 FG is yet to update their subscription to Freshworks for us to add users, adding users is needed to move to other tasks in the list.
- 2
- 3
- 4

Status: Project is OFF TRACK.

**If off-track:**

**What is the reason of not meeting this week's sprint targets? Is this clear among all team members?**

Delay on CRM Subscription Upgrade

**How to close delay and action plan to get back on track**

Upgrade FG's CRM Subscription

**What will this delay cost? Does everyone understand this cost?**

(Are we pushing a launch? Will it mean the end of this project will be pushed by 1 week?)

We might be pushing the rollout at a later date, if not, we might cram all the tasks leading to the rollout as soon as the subscription is updated and the users are added.

**Accountability Charter:** We affix our signatures below to acknowledge that this report is the true picture of what happened this week for this project.

[Team member 1]

[Team member 4]

[Team member 2]

[Team member 5]

[Team member 3]

[Project coordinator]