

Project / Week / Owner: CRM module · 2025-09-01...2025-09-07 · S. Fedotov

Week focus: Leads MVP (kanban, import, access rights)

1) Results of the week

What we did	Effect	Comment
Lead import from Excel/CSV	Upload 1,000 contacts in < 30 sec	Saves managers' time, fewer manual input errors
Kanban board by stages	Status updates ~40% faster	Speeds up deal movement, clearer visual control
Access roles + audit	Reduce access risks; change history visible	Transparency for leadership: who changed what

2) Progress

Metric	Value	Comment
Delivered / Planned	18 / 22 (82%)	Some tasks moved to next week (not critical)
Key release date	2025-09-20 (no change)	Date held, schedule stable

3) Indicators (RAG)

Schedule	Quality	Budget	Team
● On track	● Minor UI issues	● +3% within norm	● Stable, 3/3 (QA joining)

4) Risks

Risk	Mitigation / Action	Due	Comment
Corporate email access	Awaiting IT approval, temporary workaround	09-12	May delay auto-pulling emails into cards
Database migration (deduplication)	Night maintenance window	09-11	Short downtime at night; rollback plan ready

5) 10-day plan

Expected effect	Action	Deadline	Comment
↑ Lead conversion	Inline edits on the board	09-14	Managers update statuses faster
↓ Duplicates in DB	Match by email/domain	09-13	Cleaner database
Email history visibility	Pull latest emails into card	09-15	Recent emails visible in lead card

6) Budget and team

Budget (actual vs plan)	Forecast to release	Team	Comment
+3%	Within limits	3/3 stable; QA 0.5 FTE from 09-09	For in-house staff budget is mostly fixed; deviations from PTO/contractors

7) Decisions needed

- Confirm corporate email access by 09-09 — IT/Security
- Approve part-time QA until 09-10 — Budget Owner