

TEMPLATE - Sprint Retro/Review [CP-FY26-18] & Sprint Planning [CP-FY26-19]

Current Sprint	<i>Enter current sprint name and date</i> CP-FY26-18 (09/06/2026 - 22/06/2026)
New Sprint	<i>Enter next sprint name and date</i> CP-FY26-19 (23/06/2026 - 06/07/2026)
Attendees	

Quick links

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SPRINT RETROSPECTIVE

Please complete this section before the meeting so the team can make the meeting focused, evidence-led and action-oriented.

Use it to reflect on what worked well, what slowed the team down, and any risks, blockers or dependencies that need attention.

Capture clear discussion points, decisions and next steps, including actions to carry forward into sprint planning or items that need to be escalated.

What we will do differently	
What went well	
Challenges	
Discussion Points	

SPRINT REVIEW

Review all open tickets remaining in the current sprint and agree the next action for each item, add a comment on each ticket with ‘End of sprint’ update.

Confirm whether the ticket is still a priority for the upcoming sprint, whether there are any blockers, dependencies or outstanding decisions, and whether it has enough clarity to be carried forward.

If the work is no longer urgent or cannot be progressed next sprint, move it to a future sprint or return it to the backlog with clear notes on why.

Task	Status
Review open tickets in current sprint	CP-216: Third Party App Selection for Teams Integration with S alesforce IN DEVELOPMENT BRING INTO NEXT SPRINT CP-2193: Create To-Be Process Document to share with Magen trix IN DEVELOPMENT BRING INTO NEXT SPRINT

	• CP-2343: Create Technical Document for Reminders Process CLOSED BRING INTO NEXT SPRINT. Can we start working on the reminder tickets now? • SSD-6866: Revaluation on Bank Accounts is not working (Certinia Case 00472515) DONE BRING INTO NEXT SPRINT • SSD-31535: Bulk upload for International/foreign payments via NatWest & Fields in Accounts set up WITH THIRD PARTY BRING INTO NEXT SPRINT. Was finance a blocker on this from a testing point of view? They said it would be end of the month - check emails • SSD-36590: New security requirements being enforced by Salesforce in June 2026. WORK IN PROGRESS BRING INTO NEXT SPRINT • SSD-35696: SOAP API Login Retirement WORK IN PROGRESS ? • SSD-36410: Standard-Volume Platform Events Retirement due Oct 2026 - Certinia case (00497057) WORK IN PROGRESS BRING INTO NEXT SPRINT • SSD-37165: Trying to make an account DONE ?
Close sprint	☐ Completed

TICKETS ADDED MID-SPRINT

Use the Jira filter for your project to identify all tickets added after the sprint started and update the table below with the relevant details.

For each ticket, capture the reason it was introduced mid-sprint, who requested or approved the change, and whether it was due to an urgent issue, dependency, production support need, business priority or scope change.

Issue key	Summary
SSD-37165: Trying to make an account t DONE	
SSD-36983: Amounts on email and on SF system do not match DONE	

 SSD-36957: Change Request: New Field 'Free Zone' on Customer Account DONE	
 CP-2392: Create end user process document - Transaction History CLOSED	
 CP-2361: New Requirements Following Demo with Business - Transaction History CLOSED	
 CP-2345: New Requirements Following Demo with Bronwyn - Transaction History CLOSED	

TICKETS DEPLOYED TO PRODUCTION

Use the Jira filter for your project to update the table below and list all tickets that were deployed to production.

Issue key	Summary
 SSD-37203: Add Product Sector Values into the Record Type S DONE	Required by data team
 SSD-37066: New brand creation on DONE	Required by data team
 SSD-37062: Price Book Mass Upload DONE	New currency needed to be added (VND)
 SSD-36957: Change Request: New Field 'Free Zone' on Customer Account DONE	Added mid-sprint - quick win
 CP-2361: New Requirements Following Demo with Business -	Transaction History new feature deployed into production

Transaction History CLOSED	
CP-2345: New Requirements Following Demo with Bronwyn - Transaction History CLOSED	
CP-2314: Finalise Template & Field Mapping for Transaction H istory CLOSED	
CP-2311: Guided Screen Flow for Generating Transaction Hist ory Document CLOSED	
CP-2306: On an Invoice, Ove rride "Payment Status = Paid" t o "Credited" when Match Type i s Credited (Certinia Case 00491 189) CLOSED	New field created in order for finance to see billing documents which have been Credited

SPRINT GOALS - END OF SPRINT STATUS

Update the End of Sprint Status column for each sprint goal to confirm whether the goal was Completed, Part Completed, or Not Completed.

Include a brief explanation for the outcome, especially where the goal was missed or carried over, and note any blockers, dependencies, scope changes, testing delays or external factors that affected delivery.

Use this review to identify follow-up actions, owners and any items that need to be moved into the next sprint or escalated for support.

✓ Completed

✗ Not Completed

▢ Part Completed

Sprint Goal	Sprint Goal Description	Assigned To	End of Sprint Status
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🔖 CP-2314: Finalise Template & Field Mapping for Transaction History CLOSED	Deploy to Prod	Charan	✅ Completed
🔖 CP-2311: Guided Screen Flow for Generating Transaction History Document CLOSED	Deploy to Prod	Raje	✅ Completed
🔖 CP-2193: Create To-Be Processes Document to share with Magen IN DEVELOPMENT	Review mapping	Allmas / Dips	

SPRINT PLANNING

Before sprint planning, add any tickets that need to be considered for inclusion in the next sprint.

Do not duplicate tickets that are already in the backlog for discussion, use this table for new, urgent or high-priority items that may affect sprint capacity, goals or team focus.

For each ticket, capture the reason it should be considered, any known blockers or dependencies, and the action required, such as confirming priority, assigning an owner, refining the scope or moving it into a future sprint.

Ticket Number	Summary

TEAM AVAILABILITY

Review team availability and delivery capacity for the next sprint before confirming the sprint plan.

Discuss any planned or unplanned annual leave, upcoming shows or other activities that may reduce capacity or create delivery risks.

Check the quarterly planning board to make sure priorities, timelines and dependencies are up to date, then review the backlog and proposed sprint tickets as a team.

Use this discussion to agree what can realistically be completed, confirm ownership and focus areas, identify blockers or dependency risks, and decide whether any tickets need to be reprioritised, split, moved to a future sprint or escalated for further clarification.

Task	Description	Status
Team members availability for next sprint	Dips - Charan - Allmas - Sohail - Taslima - Raje -	
Review Upcoming Events	Are there any upcoming events which could block deployment?	
Quarterly Planning	Run through quarterly planning board	
Upcoming Tickets	- Team to add tickets which need to be discussed (review next sprint in backlog before adding tickets.) - Review future sprint for upcoming tickets	
Review tickets in next sprint & Team Focus	Review backlog and tickets planned for next sprint. Can we completed them all? Summary of what each	Allmas - Charan - Raje - Taslima - Sohail -

	member of the team will be focusing on.	Dips -
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NEW SPRINT GOALS

Use the tickets selected for the sprint to agree a small set of clear, realistic sprint goals that reflect the highest-priority outcomes the team is committing to deliver.

Each goal should explain the value or outcome expected, the key ticket or group of tickets it relates to, and any assumptions, dependencies or risks that may affect delivery.

Confirm that the goal is achievable within the team's available capacity, has a clear owner, and includes enough detail for the team to review progress during the sprint and assess whether it was completed at the end of the sprint.

Jira Ticket	Sprint Goal Description	Assigned To

☐ **Start new sprint**

PLATFORM OWNER COMMENTS

Use this section to capture any actions, risks, blockers, dependencies or key discussion points that the Product Owner needs to raise with the platform owners during the bi-weekly sprint review and planning alignment meeting.

Include enough context for each item so the platform owners understand why it needs attention, the impact on sprint delivery or future planning, and what decision, support or follow-up action is required.

Where possible, note the relevant Jira ticket, priority, target timeline and whether the item needs escalation, clarification, reprioritisation or alignment across teams.

Actions for Platform Owner Meeting

☐ Review Quarterly Planning board - are we on track?

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