

# Onboarding Runbook

Book detailing all the steps and goals of Project Teams onboarding

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# Developer Onboarding

## 1. Introduction

- **Welcome Message**
  - Warm greeting from the team and leadership.
  - Brief overview of the company's mission and values.
- **Purpose of the Runbook**
  - Explain the goals of the onboarding process.
  - Outline what the developer can expect to learn.

## 2. Company Overview

- **Company History & Mission**
  - A short history of the company.
  - Mission, vision, and core values.
- **Organizational Structure**
  - Overview of departments and key teams.
  - Organizational chart and leadership bios.

## 3. Team and Role Integration

- **Team Introduction**
  - Overview of the development team.
  - Introductions to key contacts and mentors.
- **Role Responsibilities**
  - Detailed description of the role.
  - Expectations and key performance indicators.
- **Communication Channels**
  - List of internal communication tools (e.g., Slack, email, project management tools).
  - Best practices for team communication.

## 4. Technical Environment Setup

- **Hardware and Software Requirements**
  - Necessary equipment (laptop, monitors, etc.).
  - Software installations (IDEs, version control systems, etc.).

- **Access Credentials**

- Steps to obtain access to systems (VPN, internal networks, etc.).
- How to request necessary permissions.

- **Development Tools and Environment**

- Overview of the tech stack and development environment.
- Installation guides and configuration settings.
- Accessing repositories and codebases (Git, Bitbucket, GitHub, etc.).

## 5. Project and Codebase Overview

- **Current Projects Overview**

- Summary of ongoing projects and priorities.
- How the developer's work fits into the larger picture.

- **Codebase Walkthrough**

- Architecture overview and key components.
- Coding standards and guidelines.
- Repository structure and navigation tips.

## 6. Development Processes

- **Agile/Scrum Methodology**

- Explanation of the development process (sprints, stand-ups, retrospectives).
- Tools used for task tracking (e.g., Jira, Trello).

- **Code Reviews and Quality Assurance**

- Best practices for submitting and reviewing code.
- Testing protocols (unit tests, integration tests, etc.).

- **Deployment and CI/CD Pipelines**

- Overview of the deployment process.
- Tools used for continuous integration and deployment.

## 7. Learning Resources and Documentation

- **Internal Documentation**

- Location and structure of internal wikis or knowledge bases.
- How to contribute to or update documentation.

- **Training Materials**

- Recommended courses, tutorials, or workshops.
- Links to video tutorials or recorded onboarding sessions.

- **External Resources**

- Industry blogs, forums, and communities relevant to the tech stack.

## 8. Security and Compliance

- **Security Best Practices**
  - Overview of security policies and protocols.
  - Guidelines for secure coding practices.
- **Compliance and Data Privacy**
  - Information on regulatory requirements.
  - Steps to ensure compliance within the development environment.

## 9. Support and Feedback

- **Mentorship and Buddy System**
  - Details on assigned mentors or buddies.
  - How to schedule one-on-one sessions.
- **Escalation Paths**
  - Contact information for IT support, HR, and other key departments.
  - Steps to report issues or ask for help.
- **Feedback Mechanisms**
  - How and when to provide feedback on the onboarding process.
  - Channels for ongoing improvement suggestions.

## 10. Checklist and Timeline

- **Onboarding Checklist**
  - Step-by-step list of tasks to be completed during the first week, month, and quarter.
- **Timeline and Milestones**
  - Expected milestones and progress reviews.
  - Regular check-in schedules with supervisors.

# Product Manager Onboarding

## 1. Introduction

**Welcome to the team! We are excited to have you as a product manager for our next project cycle.**

- **Purpose of the Runbook**
  - Explain the goals of the onboarding process.
  - Outline the scope of the product manager role.

## 2. Blueprint Overview

- Blueprint is a student organization created to serve Non-Profit Organizations (NPOs) by providing them with free web or mobile app solutions.

## 3. Team and Role Responsibilities

- **Organize project team and NPO meetings**
  - Project team meetings may consist of:
    - **Standup** – Quick updates on progress
    - **Task Review** – Evaluate ongoing/completed tasks and address any concerns
    - **NPO feedback review** (if applicable)
    - **Task Assignment** – Define and assign tasks for the upcoming week
    - **Open Discussion** – Address any additional topics or unplanned updates
  - Weekly meetings will alternate between standup and sprint planning/review. More info linked down below
  - NPO meetings occur monthly and consist of:
    - **Progress Report** – Display project progress to stakeholders
    - **Open Discussion** – Ask any relevant questions regarding the project or project status
- **Define Tasks/Features to be implemented**
  - Create user stories and task descriptions for developers to implement
  - Work with the Tech Lead decide technical implementation of tasks/features
- **Set goals and Timeline**

- Set goals for each meeting and sprint
- Determine the timeline of the project
  - What features can be done by the MVP, by the final product handoff?
  - What features need to be cut?
    - If so, how should I tell the NPO?
- **Team Dynamics/Hierarchy**
  - The project team hierarchy is as such: PM --> Tech Lead --> Designer & Developers
  - PMs have the final say in all decisions
    - Decide what can and cannot be done
  - Determine priority of tasks/features
- **Track Project Progress**
  - Utilize time management applications to track status of project
    - Github taskboard, Jira, Notion, etc...

## 4. Learning Resources and Documentation

- For Scrum/Agile Methodology
  - <https://wiki.sitblueprint.com/books/onboarding/page/product-management-agile-at-blueprint>

## 5. Communication Channels

- **For Project Team**
  - GitHub Task Board
  - Meeting Minutes
  - Discord Channels
- **For NPO**
  - Google meet, zoom, etc...
  - Email
  - For fast/urgent communication
    - Slack, Discord, etc...

# Project Timeline

## Summer

### End of July

- **Project Proposal Discussion**

## August

### Pre-Semester Preparations

- **Meeting with NPO**
- **Confirm project for the year**

### Communication & Collaboration Setup

- **Clarify communication channels:**
  - Options: Slack, Discord, Email (choose one that is easily accessible and ideally faster than email)

### Project Kickoff & Design

- **First Project Team Meeting**
- **Start Design Mockups**
- **Develop Software Design Documents:**
  - Architecture documents
  - Database schema
  - Tech stack decisions
  - API interface specifications
- **NPO Involvement:**
  - NPO reviews and provides feedback on designs prior to semester start
  - This process should involve the entire team

### Team Responsibilities

- **Tech Lead / VP Tech Responsibilities:**
  - Setup GitHub repository
  - Setup pipelines
  - Establish staging environment
- **Project Manager (PM):**

- Begin writing master issues for general features, following scrum methodology and user stories
  - **Technical Aspect:**
    - TECH LEAD to write technical features of issues
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# Fall Semester

## September

- **Monthly Meetings:**
  - Meeting with NPOs for ongoing feedback

## October

### Midpoint Review with VP Projects and Tech Leads:

- **Feedback Focus:**
  - Input from NPO and team members
  - Improvements in operations
  - Project updates
  - General team feedback
  - Team member statuses
  - Efficient practices
  - Necessary operational changes
  - Design team review ensuring alignment with project proposal

## November - December

### Semester Review with VP Projects and Tech Leads:

- **Review Points:**
  - MVP progress
  - Next steps (if necessary)
  - Project updates
  - General team feedback
  - Team member statuses
  - Efficient practices
  - Operational changes
  - Design team review for cross-checking with project proposal

### End of Semester

- **NPO Meeting:**



- MVP Showcase
  - Winter Break begins
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# Winter Break and Spring Semester

## Transition: Winter Break to Beginning of Spring Semester

- **Project Team Adjustments:**
  - Possible swaps between Developers and PMs
- **Spring Onboarding Meeting:**
  - Involvement of Tech Leads, PMs, and VP Projects, conducted BEFORE the semester starts
  - Implement operational changes
  - Restart NPO communication
  - Confirm project readiness

## Early March (Before Spring Break)

- **Midpoint Review with VP Projects and Tech Leads:**
  - **Review Areas:**
    - Feedback from NPO and team members
    - Improvements in operations
    - Project updates
    - General team feedback
    - Team member statuses
    - Efficient practices
    - Operational changes
    - Design team review confirming alignment with project proposal

## During/After Spring Break

- **Operational Changes:**
  - Plan and implement further operational improvements

## End of April

- **Final Product Demo:**
  - Presentation for VP Tech, VP Projects, and other stakeholders
  - Testing and final adjustments
  - Final cross-check with project proposal

## May

- Final Product Handoff

# Scope of Roles

This document describes the overall responsibilities of each role on a project team. For more detail on each role, please see their respective runbooks. Anyone participating in a project team has discretion to comment on any features including frontend and backend architecture and implementation, UI/UX designs, and any other internal discussions.

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## Product Manager Tasks

- Communication
    - Communication Channels
      - Manage Discord project team channel
      - Facilitate communication between NPOs and Project Team
        - Via Email, Slack, Discord, at PMs discretion
      - Manage task organization software(Github Taskboard, Jira, etc...)
    - Meetings
      - Organize and lead Project Team Meetings
        - Create agenda
          - Standup
          - Goals of meeting
          - Task delegation
          - Iterate feedback from NPO
      - Organize NPO Meetings
        - Feature/progress report
        - Ask questions regarding:
          - Features
          - Timeline
          - Scope of Project
  - Features
    - Determine priority of features
    - Write Masters feature issues/tasks
      - To be populate by Tech Leads
    - Delegate tasks
  - Quality Assurance
    - Test Features for functionality
      - Write according bug/fix tasks that address necessary changes
    - Approve UI/UX and designs
      - Test functionality of buttons, hyperlinks, embedded videos, etc..
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## Tech Lead Responsibilities

- Communication
    - Attend Monthly NPO meetings
      - Walk through feature/progress reports
      - Ask relevant technical questions
    - Project Team Meetings
      - Address any technical issues raised by devs
      - Decide technical implementation of features/tasks
      - Delegate tasks
  - Features
    - Review, comment, and approve PRs
    - Delegate tasks
    - Complete assigned tasks
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## Developer Responsibilities

- Communication
    - Attend all project team meetings
      - Provide progress report on tasks
      - Ask necessary questions
      - Receive task assignments
  - Features
    - Complete assigned tasks
    - Review, comment, and approve PRs
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## Designer Responsibilities

- Communication
  - Attend all Project Team meetings
  - Attend necessary NPO meetings (summer, early fall)
- Features
  - Complete UI/UX designs of project
  - Complete task assignment