

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.

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..

Tech Lead Responsibilities

- Communication
 - Attend Monthly NPO meetings
 - Walk though feature/progress reports
 - Ask releveant technical questions
 - Project Team Meetings
 - Address any technical issues raised by devs
 - Decide technical implementation of features/tass
 - 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

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