2.0

👋 Rocket.Chat Handbook

Welcome aboard!

Welcome to the company handbook! Here you'll find everything you need to know about the company. Within our internal docs, there are several sections. Some are more important than others to read, so here's a guide on what you can find here.

> ⓘ We know it's practically impossible to go through all of it in a single run, so **make sure to check our policies and your area's specific documents** from time to time.

The Company

This is an overview of our culture and some of the high-level stuff about how we operate. This gives new employees a clear picture of the company and what you can expect from us.

Departments and Operations

You can find team-specific details about each team's purpose and processes here.

✍️ Contributing to handbook

This Handbook will always be a work in progress, and everyone is responsible for keeping it up-to-date and relevant.

You are encouraged to update the processes your team or the whole company uses. If your area does not have a section in the menu, go ahead and create one. Suggest a change if you notice some procedures have changed from what's been written.

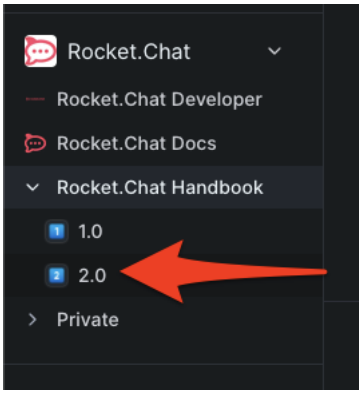
Open vs Closed Information

Rocket.Chat is **open** by default. This means that unless something is explicitly prohibited from going public, it should be public. Examples of protected information are employee individual compensation and customer contracts.

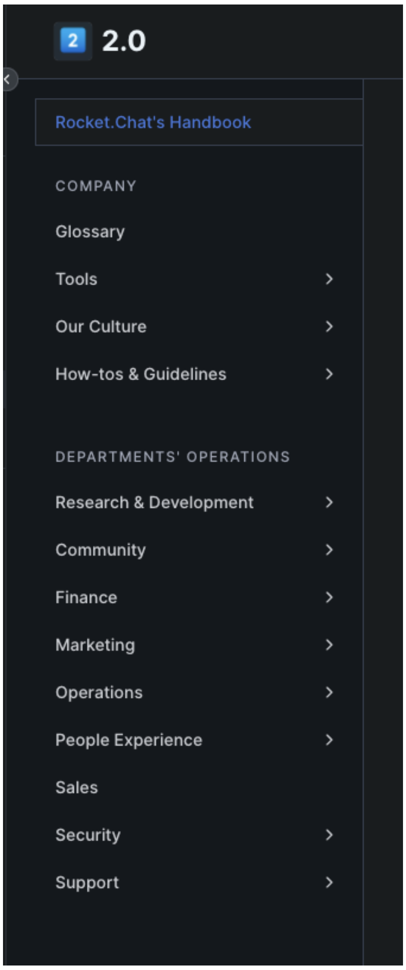
Creating or Editing Pages

To create or edit pages within the Handbook, you must log in to Gitbook. If you don't have an account, send a message to Marcelo Schmidt to get an invitation link.

After you log in, click the Rocket.Chat Handbook link, then click the 2.0 version:

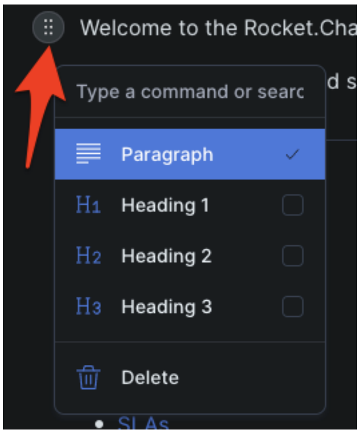


Then navigate through the menus and find where you want to edit or create a new page.

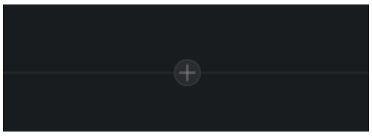


Then click the blue "Edit" button at the top-right portion of your screen.

If you want to edit the current text, click it and edit in place. You'll see a menu at the right of your editing text that allows you to format the text.

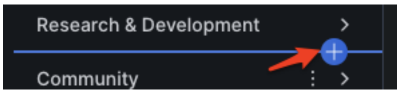


By hovering your mouse in between lines, you can insert a new paragraph by clicking the plus sign that shows up.



To upload images, just copy and paste them into the text.

To create a new menu item, hover between items and click the plus sign.



After you are done creating or editing, click the "Submit" button to create a Change Request that can be reviewed and merged.

The Company

👨‍💻 Organization Chart

Rocket.Chat was born as a distributed, remote-first company. Currently, with team members in over 26 countries. To be able to view our amazing Rocketeers across the globe, you can go to:

Rocket.Chat - Org Chart, Teams, Culture & Jobs | The Org
THE ORG

Rocket.Chat organizational chart

You can see the full structure of our organization, every team member and their roles, and the size of each team, and even start putting names to faces already! On your first day, you will also be added to it, so don't worry about adding yourself.

Under the **Departments and Operations** section, you can meet each of our teams, so keep TheOrg by your side as a little map while learning more about the company structure.

Remember, this introduction is for you to get to know all our different departments. You will also learn more about your direct department and team after the onboarding.

Glossary

The purpose of this document is to define common definitions as seen around our documentation, metrics, and day-to-day conversations.

Metrics

Prospect:

- Visitors on the website or any other medium, although they didn’t share any type of personal/company information or interest (sources).
- Responsible: Marketing

Lead:

- Someone that expresses interest and shares more information that has:
  - Shared personal information but no company information
  - Registered on newsletter, events, etc
- Responsible: Marketing

Marketing Qualified Lead (MQL):

- Someone that expresses interest and shares more information regarding the company that has:
  - Shared individual and company information
- This is the point where the lead is ready to talk to an SDR
- Responsible: Marketing

Product Qualified Lead (PQL):

- Someone that has engaged on a free trial or in our community version and has a score above a threshold considering size, industry, and country.
- This is the point where the lead is ready to talk to an SDR
- Responsible: Marketing and Product

Sales Qualified Lead (SQL):

- Someone that the SDR has already talked to and fits the target profile has the pain identified, and the timing is right.
  - At this stage, the SDR will have already talked to the client and identified a potential opportunity (need, time, authority, budget)
- This is the point where the lead is ready to talk to a closer
- Responsible: Sales (SDR)

Forecasting Category (former "Confidence Level" on Zoho CRM):

- Commit (former "Very Confident"): either a late-stage deal OR a well-progressed deal that the rep says will close as part of their forecast for the current quarter. All deals in Verbal Approval with a closing date in the current quarter must be selected as Commit.
- Best Case: upside or viable opportunities that could be accelerated to close in this quarter or advance with solid chances for us to win eventually. Rep has a solid amount of confidence in closing but may miss a key "SPICED" element such as decision-maker, timing, OR any other. However, two things must be certain: we can solve their PAIN and they see IMPACT.
- Early Stage: uncertainty on many key elements of the SPICED framework that limit the ability to have any higher confidence level or inclusion in committed forecast number.
- Omitted: For just created opportunity or super early prospecting/discovery analysis. Opportunities may only exist because the company is in our ICP. Likely only "situation" or no elements of the SPICED framework have been identified/validated.

Forecasting Scenarios:

- Optimistic:
  - Commit = 100%; Best Case = 50%; Early Stage = 10%
- Base:
  - Commit = 90%; Best Case = 40%; Early Stage = 0%
- Conservative:
  - Commit = 80%; Best Case = 35%; Early Stage = 0%

Lagged Contracts:

- New Sale / Upsell contracts closed at t, but starting at t + 1 (i.e. closed in April, but starts in May)

Contract Consumption:

- How much (%) of the total contract has been consumed.

Logos:

- Synonym for "Company" used in the context of Logo Churn and New Logo.

Opportunity (Opp):

- Someone that was verified by the sales team (closer/hunter) that benefits from the product and passes the SLA of opportunity.
  - At this stage, the Closer will have already talked to the client and identified an opportunity (need, time, authority, budget)
- Responsible: Sales (Closer)

Recurring Revenue Concepts

Refer to Whimsical for more info regarding recurring revenue..

ACV = Annual Contract Value:

- All contracts (Non-recurring such as Events and Professional services included)
- Value of contracts on a yearly basis
- Contracts that are > 12 months will be annualized
- Contracts that are < 12 months won't be annualized

TCV = Total Contract Value:

- Takes into account non-recurring businesses
- "Amount" field in Zoho CRM fields
- Back to our previous example Ex1 = $10k and Ex2 = $10k

Bookings ARR (Annual Recurring Revenue):

- **Deprecated since Feb 2021**
- Only recurring contracts (events and professional services not included)
- Value of contracts on a yearly basis
- Contracts that are > 12 months will be annualized
- Contracts that are < 12 months won't be annualized

Ex1: 2 year contract worth $10k - Bookings ARR = $5k

Ex2: 6 month contract worth $10k - Bookings ARR = $10k

Deals Won

- Amount of deals on the stage closed won
- Includes all types (new sale, upsell, renewal)

Open Deals

- Amount of deals on pipeline meaning the stage is not closed, won or lost

Overdue Tasks

- Tasks still open with the current date being after the deadline to complete the task

Target

- Sales quota based on ACV

Average Ticket Won

- ACV / Deal Won

Average Discount

- Takes into account all deals Closed Won divided by their supposed full price
- (TCV (Amount) Closed Won / (TCV (Amount) Unit Price per Product x Seats Closed)

Win Rate:

- Only for New Sale deals
- Only for Opportunity onwards
- Closed won deals / (Closed Won + closed lost)

Sales Cycle

- Only for closed Won Deals
- Only for type New Sale deals
- Sum of days spent on each stage

Renewal Rate:

- Only for type Renewal
- Closed Won / (Closed Won + Closed Lost)
- Can be by Amount ($) or by the logos (#)

Pipeline:

- All stages different from Closed Won and Closed Lost for types Upsell and Renewal
- From opportunity onwards not including Closed Won and Closed Lost for type new sale

SaaS (Software as a Service):

- "Software as a service is a software licensing and delivery model in which software is licensed on a **subscription basis** and is **centrally hosted**.". Check this video for more info.

Sales Enabled:

- Customers who were acquired by the Sales Team. They could be SaaS (Gold, Silver, and Bronze) or Self-Managed (Pro and Enterprise).

Self-Service:

- Customers who haven't gone through the Sales Team. Exclusively SaaS (Gold, Silver, and Bronze).

Community Size Composite Index:

This index was created so we can better measure our Community Size growth. Find below its components and weights.

- 30% Users on Open Server
- 30% Users on forums.rocket.chat
- 20% Stargazers on GitHub
- 20% Unique Users Creating Issues on GitHub

Revenue Weekly - SDRs

All the metrics below exclude Deals that went directly from Pre-Pipeline to Closed Lost.

Sales Territory

How we get the Sales Territory

# of SQL Created

Count of New Sale Deals.

# of Opps Created

Count of New Sale Deals that left the Pre-Pipeline Stage.

Total Current Pipeline

Sum of Current Deal Amount of New Sale Deals in all Stages EXCEPT Pre-Pipeline.

Open Current Pipeline

Sum of Current Deal Amount of New Sale Deals in OPEN Stages EXCEPT Pre-Pipeline.

Amount when Deal was created

Snapshot Sum of Deal Amount when New Sale Deals were created.

Partners

We use the "Partner (Lookup)" field from the Deals module on Zoho CRM to define which partner is related to an opportunity and create the proper metrics on Zoho Analytics.

We also have a "Partner (Lookup)" field in the Accounts module on Zoho CRM but it's only used for visual reference by the Salespeople.

🔧 Tools

Rocket.Chat

This page contains best practices for using Rocket.Chat on your day-to-day work

Using Rocket.Chat Daily

We use Rocket.Chat in our daily routine. We expect you to use it while you are working. Make sure to add the channel `#important` to your favourites, or check it regularly. Company announcements are usually made there.

Best Practices

No Hello

Please *do not* say just "Hello" in chat. It is as if you called someone on the phone and said "Hi!" and then put them on hold!

You are trying to be polite by not jumping right into the request, as you would do in person or on the phone, but chat is neither of those things. Typing is much slower than talking. Instead of being polite, you are just making the other person wait for you to phrase your question, which is lost productivity.

Asking your question before getting a reply allows for asynchronous communication. If the other party is away, and you leave before they come back, they can still answer your question, instead of just staring at a "Hello" and wondering what they missed.

No Hello

Don't Overuse Audio

Audios are not searchable. Ensure that when you use audio, it's short and given a context around, it so people can find it if they use the search. Audios should not convey more than one topic or task. You can't break audio into multiple pieces if you need to refer back to a specific point in time.

Don't Overuse Multiuser DMs

The DMs with multiple users are by design forever limited to the original members. You will never be able to add or remove any member to the conversation, even if they leave the company. This type of channel was designed for personal conversations with a defined and limited audience. If you are going to discuss any nonpersonal topic, please consider creating a channel or a discussion.

Keep People Updated

When you ask someone to help you with something, but this person takes too long to answer, and you end up finding a solution somewhere else, let them know. Often the person didn't answer right away and will try to find the solution before telling you they are looking for one to give you a complete answer (and an asynchronous one). As a gratitude token towards them possibly finding a solution, let them know they don't need to worry about it anymore.

Use Mentions

Even on DMs, if you need someone's attention immediately, mention them so they will see a red badge beside the room name. Don't overuse it, though. Mentioning people in every DM will make it useless, and people may start ignoring it at all.

Share Passwords Responsibly

In certain, limited cases, a password or other secret needs to be shared between multiple people. Never share passwords in plaintext (such as a normal Rocket.Chat message or email), but always use a password-sharing tool like Zoho Vault, to which the other person has access to.

Don't Spam

Don't send the same message to multiple rooms (known as cross-posting) in the hopes that everybody will read it. If you need to send a message to the whole team, send it on #important or the Rocket.Chat Core Team group.

In the same way, don't send the same request to multiple people. If you need someone from a team to do a task, then send in that team's channel, or add to that team's Clickup board.

Permissions

Every user on the Rocket.Chat server has specific permissions, combined together in a role. You can see most roles a person has in form of a `tag` next to username. Here we explain how we grant them:

- The `admin` role is only given to individuals that have a regular need to change and control settings and permissions on the server (engineering squad leads, QA, infrastructure and similar).
- The `moderator-global` role is given to individuals who manage users and content on a global scale (HR, management, security), such as for adding users to non-owned rooms or teams or deactivating users. Beyond that, it does not contain access to additional server settings.
- The `view-privileged` role is given to individuals who need to know, but not change the current settings of the server (e.g. PMs for troubleshooting). It is single permission.
- Everyone else gets the `user` role and additional permissions only on a room level (e.g. being the owner of a certain room). This role can still create rooms and discussions.

Additional roles with a more granular permission set have to be requested from and documented by the admins.

Google G Suite

Integrated suite of collaboration and productivity apps

Systems Responsible

To better meet the needs of Rocket.chat, a table was created that allows understanding who is the owner of each configuration item associated with a company service or software.

For critical software owners, administrators and privileged users, check the Systems & Users (private to Rocket.Chat users). Legend for reading it:

- SA: Super Administrator or Owner
- A: Administrator
- P: Privileged user
- U: User (only reported when relevant information is shared)

It is understood that Configuration Item Owner is the person or team responsible for providing support and making decisions associated with that particular item, not representing, in itself, the sole responsible for the use of the tool.

Two ways will be presented to provide the same information, the first being a grouping by teams or people responsible for each item; in a second moment, the items will be presented in alphabetical order to facilitate the location.

Alphabetical order:

Apps-CLI	Apps-Engine	Douglas Gubert
Apps-Engine	Apps-Engine	Douglas Gubert
Banner Service	Chat-Engine	Diego Sampaio
Big Blue Button		Sing Li
Cert Manager	Infrastructure	Lucia Guevgeozian
CircleCI	Infrastructure	Lucia Guevgeozian
ClickUp		Rodrigo Nascimento
Cloud Client	SaaS	Aaron Ogle
Cloud-ops	Infrastructure	Lucia Guevgeozian
Desktop App	Chat-Engine	Guilherme Gazzo
Drone CI		Aaron Ogle
Email Bounce	Cloud	Aaron Ogle
Federation Hub	Federation Squad	
Fleetcommand	SaaS	Aaron Ogle
Fuselage	Chat-Engine	Guilherme Gazzo
GitBook		Rodrigo Nascimento
Github		Gabriel Engel & others
Grafana		Aaron Ogle / Lucia Guevgeozian
Handbook		Sing Li
Houston	Chat-Engine	Diego Sampaio
Jitsi Meet		Sing Li
JS SDK	Chat-Engine	Guilherme Gazzo
Livechat Widget	Omnichannel	Renato Becker
Longhorn	Infrastructure	Lucia Guevgeozian
Marketplace	Marketplace	Vinicius Marino
message-parser	Chat-Engine	Guilherme Gazzo
Mobile Apps	Mobile	Diego Mello
Mobile BBB	Mobile/Community	Debdut Chakraborty
Multiverse BBB	Pre-Sales	-
Multiverse Video	Pre-Sales	-
Omni (legacy)	Omnichannel	Renato Becker
Omni Asterisk	Omnichannel	-
Omni BBB	Omnichannel/Community	-
Omni Gateway	Omnichannel	Aaron Ogle
OVH Cloud	Infrastructure	Lucia Guevgeozian
Prometheus		Aaron Ogle
Push Gateway	Cloud	Aaron Ogle

RabbitMQ	Infrastructure	Lucia Guevgeozian
RC Docker Registry	Infrastructure	Lucia Guevgeozian
Releases Service	Chat-Engine	Diego Sampaio
Rocket.Chat Core	Chat-Engine	
Sponsorship service		Aaron Ogle
Statistics Collector	Data Team	
SVC Mongo	Infrastructure	Lucia Guevgeozian
Traefik LB	Infrastructure	Lucia Guevgeozian
UIKit	Chat-Engine	Guilherme Gazzo
Wizard	Chat-Engine	Guilherme Gazzo
Workspace Mongo	Infrastructure	Lucia Guevgeozian
Zoho Bridge		Marcelo Schmidt

Access Control Policy

On this page you can find the process description of the opening, changes and removal of access to all systems used in Rocket.Chat, along with area or role specific platforms, the permission level rules and department responsible for each system.

A periodic review of privileges and accesses must be performed by each area responsible for the system.

Onboarding

The access control for the onboarding is facilitated by Jira templates with a list of the primary systems the new Rocketeer should receive access to. All invites are sent on a Wednesday that precedes the Rocketeers' first day.

The list includes platforms that are used by the entire company. Platforms of each area/department are under the direct manager's responsibility to release access to the new rocketeer by following the steps described here.

Rocketeers can also request access to other specific area platforms according to necessity during their time in Rocket.Chat - like Loom, Huspot, CRM, and Figma...by following the steps described here.

Permission levels listed as "User" refer to platforms where there are no specific level attributions, and users are simply created.

Platform	Who gets access	Permission levels	Who releases the access
Google Workspace	Everyone	User	People Team
open.rocket.chat	Everyone	User, Rocket.Chat Team	People Team, Leader adds to private area specific channels
Jira	Everyone	User	Auto-Join (with RC email credentials)
Zoho People	Everyone	"Admin" for C-level and specific roles who need management rights to certain areas of the app (i.g. People Analytics or FP&A), "Team incharge" for leaders, "Team member" for all other members	People Team
Zoho Sign	Everyone	"Admin" for C-level and specific roles who need general access to documents (i.g. Onboarding specialist), "User" for all other members	People Team
Zoho Survey	Everyone (only to the Rocket.Chat segment), HR team members to the HR segment	Rocket.Chat segment: "Admin" for C-level, "User" for all other members / HR segment: "Admin" for leaders and People & Culture, "User" for other team members	People Team
Zoho Vault	Everyone	"Admin" for C-level, "User" for all other members	People Team
Officevibe	Everyone	User	People Team
TheOrg	Everyone	-	People Team
Qulture.Rocks	Everyone	"Admin" only attributed to People Analytics and HR leaders responsible for maintaining the platform, module specific admin rights can be given to users, "Member" for all other users	People Team
Zoho Desk	Support Team	-	People Team
		Permission determined by the "Profile" and "Role" fields. Profile is related to the person's role in terms of sales	

Zoho CRM	Sales, Presales and CSM Teams	("Standard" if outside of sales). The Role "Data owner" is applied to people in sales and its related areas, otherwise the "Manager" role is applied	People Team
GitHub	Engineering, Product and Community Teams	At the organization level, "Owner" level is assigned to founders and certain high-managers, while all other members have "Member" level. However, at the repository level, the team leaders responsible for each repo have "Admin" level	Engineering Team
Figma	Design and Marketing Teams	"Admin" only for CEO and Design Leader, "Editor" level for design team and specific members of marketing team, "Viewer" for anyone from Rocket.Chat who needs access or outside guests participating in certain projects	Design Leader (also conducts monthly checks and removals of inactive members)
Linkedin Sales Navigator	Sales Team	User	Revenue Operations
Yesware	Sales Team	User	Revenue Operations
Zoominfo	Noram Sales Team & SDRs	User	Revenue Operations
Zoho Telephony	Sales Team	User	Revenue Operations
Grammarly	Everyone that needs to write customer-facing e-mails or tickets	User	Revenue Operations
Uber	Everyone that needs to take rides for the company	User	Finance Team
Upwork	Everyone that needs to hire freelancers	Hiring: Source Talent Only	Finance Team
Youtube	Everyone that needs to upload videos to Rocket.Chat's channel	Manager	Marketing Team
Conta Azul	Finance Team	User	Finance Team
Xero & Hubdoc	Finance Team	"Advisor" if the person needs full access to reconciliation and reports; Otherwise, "Standard"	Finance Team

Stripe	Finance Team, RevOps Team, Support, Engineering and Product	"Analyst" for Finance and RevOps; "Developer" or "View Only" for Engineering and Product; "Support Specialist" for Support Team	Finance Team
Google Ads	Marketing Team	Standard	Marketing Team
Google Analytics	Marketing Team	Editor	Marketing Team
Twitter Ads	Marketing Team	Ad Manager	Marketing Team

Address Book

During your journey as a Rocketeer you will have different questions about different teams and topics, and to make the process of finding these answers easier for you, here goes a guide on who to call.

Team	Rocket.Chat User
Customer Success	@marcela.lima
Design	@ivan.netto
Finance	@debora.coy
Marketing	@bruno.bin
Operations	@alan.wright
Security	@bruno.cestari
Support	@amanda.oliveira
Talent Acquisition	@analopes.grun
Engineering	@rodrigo.nascimento
Product	@vinicius.marino

These are reference Rocketeers in each area, keep in mind that they might not be the ones to have all answers, but they'll be able to forward you to the right person in their team!

🧑‍🤝‍🧑 Our Culture

Meet our Culture Code and our DOTS!

Being a Rocketeer is about understanding and living our culture on an everyday basis! So you must meet what it is all about since the 1st Day!

Our Culture Code was created in 2019 during our yearly Summit. We brought **every single member** of our team together to talk about what represented us as Rocketeers, and as a result, we got a set of words, expressions and quotes that afterwards were compiled and became our Culture Code. So keep in mind that everything you see in our Culture Code was once mentioned by one or more Rocketeers and purposely built that way so it may truly represent who we are!

The core of our culture are our DOTS! They represent who we are, and who we want to be, and they show us the behaviours and competencies we should expect from every Rocketeer.

We Dream

We get out of our comfort zone and take risks because we **dream**. Our dreams take us to high goals and the fear of failure doesn't stop us from trying because we have the passion to go beyond the status quo.� To represent this value:

- Don’t be afraid of taking risks and trying new things.
- Take initiative, and get out of your comfort zone!

We Own

We hope to find those better ways because of our ownership because we **own**. We own the problems that appear and feel empowered to take initiative to solve them, testing and adapting. We own our responsibilities, and if we say it we do it, constantly trying to go the extra mile to exceed expectations. We wear this ownership every day, represented by the t-shirts we so proudly wear in every possible colour.� To represent this value:

- Get involved, help with other projects, and collaborate with other areas!
- Push yourself while being accountable and taking responsibility.

We Trust

We are so proud of what we do, we wear it and talk about it because we **trust**. We trust what we're creating, we trust the purpose of what we do, and we trust each other. That is what gives us the freedom to innovate, to create our own schedules, and to have remote work as part of who we are as Rocket.Chat. The flexibility and balance we achieve by trusting is what makes our environment one of enjoyment, is what makes us feel pleasure in doing what we do.� To represent this value:

- Freely ask for help and be available to help others.
- Don’t point fingers, speak up and offer feedback while being open to receiving it too.

We Share

We trust, believe and enjoy what we do because we **share**. We share the good and the bad because we're united by a common belief. We team up to solve problems, meet clients, create solutions, and celebrate birthdays or our yearly Summits. Most importantly, we share because that is the essence of who we are. We're open, and built by our community, so more than just sharing, it is about empowering and loving the community and who's beside us, making this all happen.� To represent this value:

- Share your knowledge and be willing to help, making your team grow with you.
- Be transparent in your actions and tasks, go open!

Check out our full Culture Code by clicking here.

Rocket.Chat RockStars

Receive stars for representing our culture and exchange them for prizes!

Our culture is one of our biggest strengths within Rocket.Chat, and we want to recognize the actions that promote it, so welcome to Rocket.Chat RockStars! Our system enables you to collect stars by representing the DOTS or on specific dates and occasions, accumulating them, and exchanging them for prizes!

We buy all products within the stars program through Printful, where you can check the entire catalog of products and colors (you can also buy some of them through the Shopify store).

We also have a quarterly ceremony related to our DOTS and the Koko Thanks category! More on that is on the next page.

What type of stars can I get?

We have three types of points:

- **Request and Collect -** whenever you do any action in this category, such as presenting a Rocket.Chats, you can submit this action for approval from our Avengers in the system and collect your stars!
- **Automatic -** collected on special days, such as birthdays, time on company anniversaries, or after using the rocketchat-thanks channel to praise someone!
- **Given by the tool admin -** these stars will be added to you by the admin of the specific tool every time you, for example, complete your IDP or 100% of the Check-in. In this case, a Qulture.Rocks admin will assign your stars to you inside the system.

Now let's see the full table of actions and events in these categories and how many stars they can get you:

Request and collect

Share content selected to be promoted (monthly) ★ 5
Create an original post for LinkedIn (monthly) ★ 10
Attend a community event ★ 20
Speak or mentor in a company event ★ 25
Host a Happy Hour game ★ 25
Completing a course 5 ★ x n. of hours
Being a New Rocketeer's buddy ★ 30
Completing the Rocketeer Certification ★ 30
Book club - 10 points ★ 100
Book club - 11-30 points ★ 150
Book club - +30 points ★ 300

Given by tool admin

Happy Hour game winner ★ 20
Completing Check-in Reviews on time ★ 30
Completing your IDP ★ 30

Automatic collect

Your birthday ★ 10
Father and Mother's Day ★ 10
Koko 1:1 (monthly) ★ 20
Koko Thanks - Give & Receive ★ 20
Years in company anniversary 200 ★ x n. of years

Remember: the points are capped at 1200.

RockStars
Table of Koko Points

Important notes about some categories:

1. The categories **Share content selected to be promoted** and **Create an original post for LinkedIn** are monthly only, meaning you can get that point once a month. The Marketing team assigns monthly campaigns applicable to these categories: you can get these stars just by sharing the selected content on LinkedIn or by writing your post directed to that campaign!
2. As mentioned before, for **Completing a course** and **Years in company anniversary**, your total of stars will be the base value multiplied by the course number of hours or by the number of years you're celebrating. For the first one, the maximum of stars you can get for a course is 50.
3. The **Koko 1:1** category gets you the stars if you do at least **one random 1:1 in the month**, and the same logic applies to the **Koko Thanks,** which works if you give or receive at least one thanks in the month.
4. The **Book Club categories** follow the rules you'll find here in the handbook too.
5. The **Check-in and IDP** categories are taken directly from Qulture.Rocks reports.
6. For **Father's and Mother's Day**, you need to fill in a field in your Zoho People profile for it to be automatically collected. Note that you must be a Mother or Father to get these points.

How to request my stars?

The first thing you should do is go to Zoho People > Compensation > RockStars. Then, add a Credit request according to the action you completed. Follow the steps below:

1. When submitting your request select **Credit**, the date, and the point type.
2. After that, the “Reference” space will show how many stars that action is worth. (Except for the "Time in the company" and "Completing a course" categories, where the reference will show you the base value that you should use in the calculation. We'll tell you more about that soon)
3. Fill in the number of points needed, and submit!

Where do I see how many stars I have?

Simply go to your Zoho People profile in order to see your Koko Points balance! **Remember**: The stars are capped at a total of 1200, so even if you request more stars, after reaching this total it will be maintained until you exchange some of them.

How do I switch my stars for items?

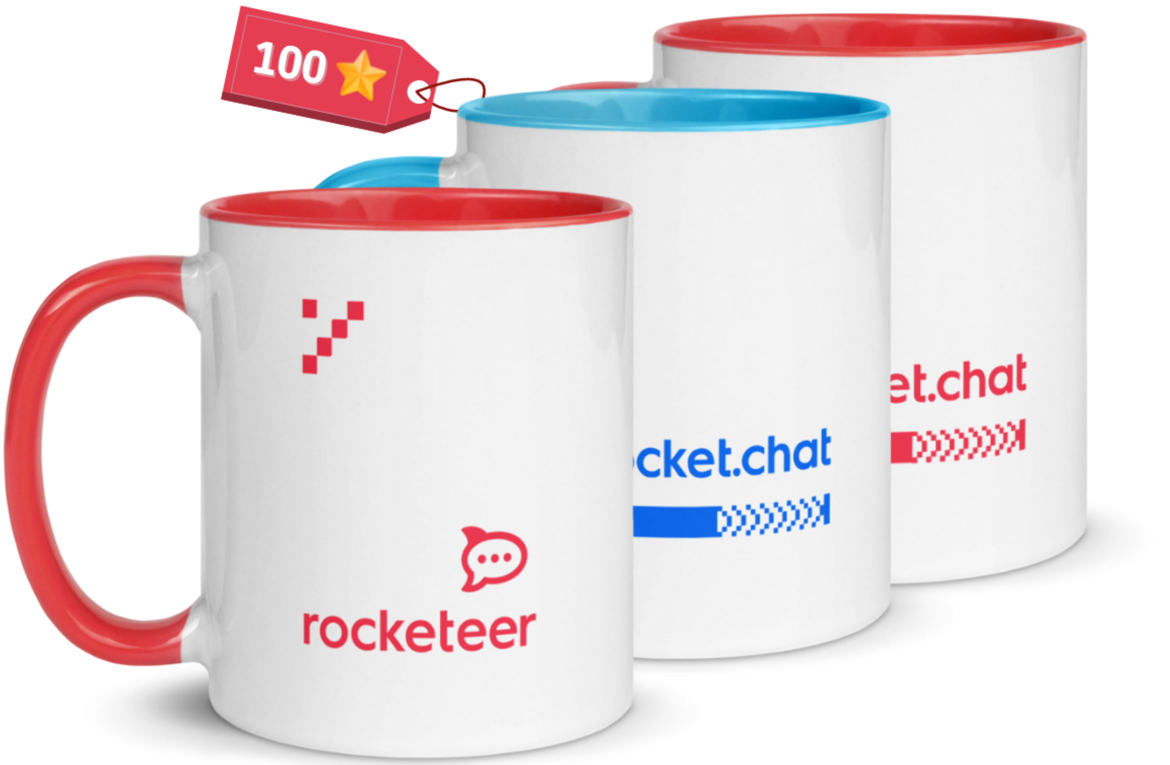
When you want to trade your star for a Rocket.Chat swag, follow the same path as you did before when requesting it inside Zoho People, but this time you'll select Debit. Follow these steps:

1. Select **Debit**, the item you want, and fill out the points field with how much it costs. Remember to always check your star balance before requesting the item to make sure you have enough to get it!
2. Then you just have to wait for an Avenger to approve your item request, and once we fulfill the order, your new Rocketeer swag is on its way to you! (It may take a while to reach you since they ship it overseas. If your country's postal service usually tends to stop any foreign order, you can request and add a note that you'll want to retrieve your item during our next Summit we'll make sure it gets to you then).

Now let's talk prizes!

Check out the complete list of Rocket.Chat swags you can get through RockStars below or here.

Mug



Socks

Notebook

Baby One-piece

Flip flops

Beanie

T-shirt

Kids T-shirts

Dawstring bag

Dad hat

Bucket hat

Tote bag

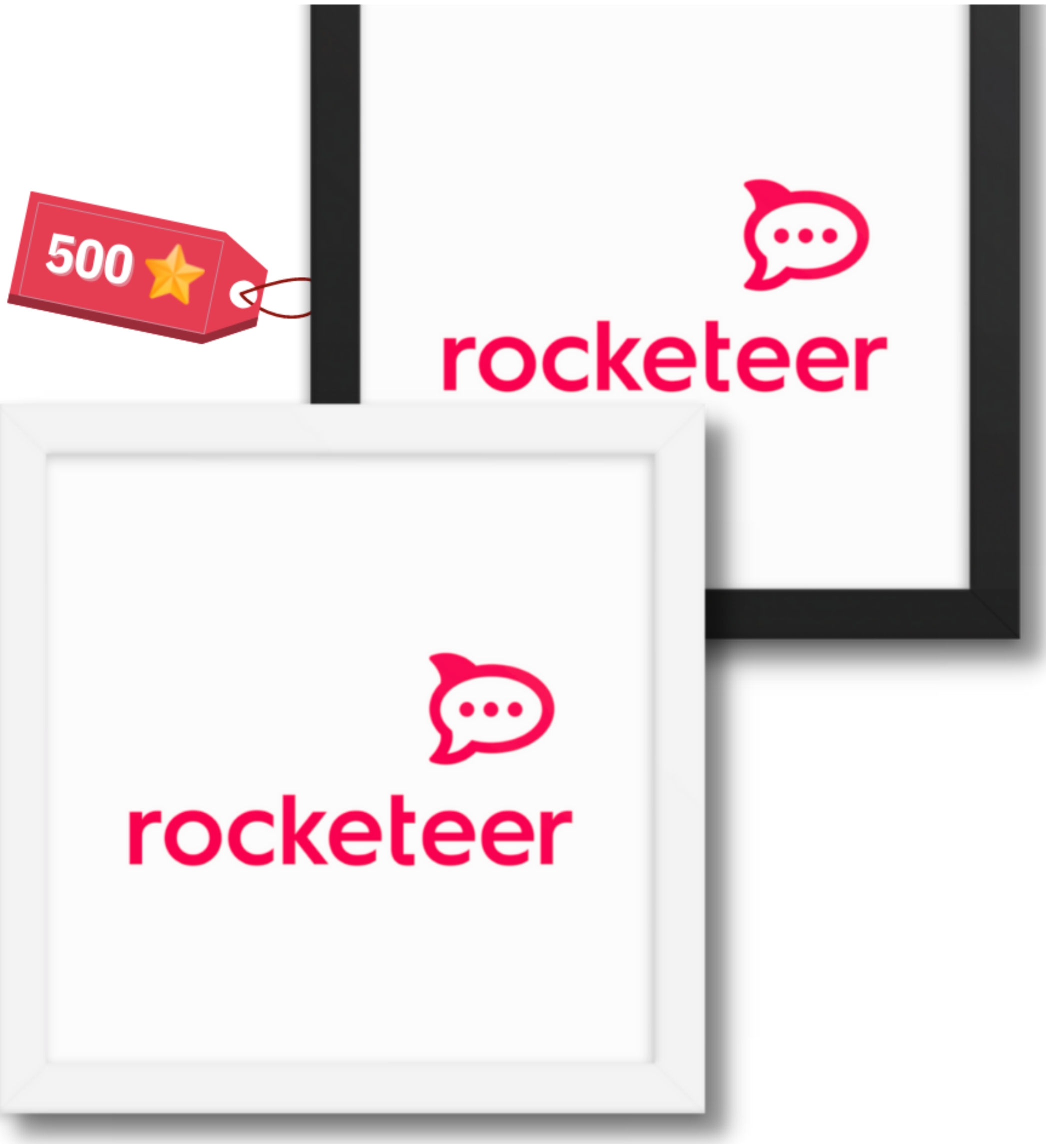
Pillow

Embroidered polo shirt

Laptop sleeve

Water bottle

Framed poster



Sweatshirt

Throw Blanket

WooHoodie

Backpack


rocket.chat

RockStars Happy Hour

As a way of recognizing our Rocketeers' efforts and having some fun together, we hold a quarterly Happy Hour to celebrate everyone's hard work! Divided into 13 categories, our award uses our #rocketchat-thanks channel as a reference, as well as the overall performance divided by department.

We know recognition is very important, so we want to do it right. We also want it to come and go, both from peers and leaders as well.

Check out all the categories and their descriptions for our award below:

1. **Koko Thanks King / Queen:** for the Rocketeer who has gotten the biggest amount of thanks!
2. **Good Vibes King / Queen:** for the Rocketeer who has gotten the biggest amount of Good Vibes cards!
3. **Department Thanks:** to the Rocketeers who have done an outstanding job in that quarter. They are chosen through a selection made by the managers.
4. **Special dates:** we also say thanks during special dates such as Mother's/Father's Day, International Women's Day, etc.
5. **Employee Walk of Fame:** every Rocketeer who shined during the quarter, regardless of the team!
6. **DOTS Guardians:** this is a special category for us because it celebrates the Rocketeers who are staying true to our DOTS and representing them perfectly!
7. **Company years' birthday:** for the Rocketeers who are celebrating a year or more in our rocket.

Remote Work

Rocket.Chat was born as a global and distributed team, and along these years Rocketeers have been developing their own hacks for remote working. So we gathered these ideas and created a Remote Work Guide dedicated specially to support our new Rocketeers!

In this guide you'll find some productivity hacks, tips for dealing with our multiple time zones, maintaining your work-life balance, and finally some home office set-up examples to inspire you!

It’s about Sharing and growing together!

The Culture Avengers

An important part of thriving as an organization is having a strong, consistent culture, especially when you have a distributed team. One important way of achieving this is through a Culture Committee, and ours goes by: **The Culture Avengers**.

The Culture Avengers are a cross-functional and multilevel team that brings different perspectives and experiences into maintaining and modifying our culture, they bring an accurate perception of the good and bad of our current culture into planning effective actions and strategies together.

Being an Avenger will allow you to be an active player in Rocket.Chat's culture, regularly advising and acting on our initiatives and being role models for what we aspire to be.

Async Communication

Embracing our remote workforce! Let’s work to improve our productivity, collaboration, & async communication

We’re not all in an office together, there are no hallway conversations happening and we can’t just talk up to each others’ desks. In order to operate effectively in our fully remote work setting and consistently further our efforts, we need proactive ownership around our communication on open.rocket.chat

RAW! It’s how we collaborate async:

React - *recognize if a relevant message* has been received and understood
Align - *contribute or engage* to make sure you understand expectations and the next steps
Work - *take action* when you have a job to do, and *let the team know about it* - now & going forward

When important messages are sent or you’re tagged in conversation, ask yourself: have I reacted, aligned (if needed) and/or signalled that I’m working on it?

Let's make communications that are clear, complete, delivered with kindness, and that create productive results!

? How-tos & Guidelines

Meetings

On this page, we're detailing how to optimize meetings in an all-remote environment.

Control your calendar

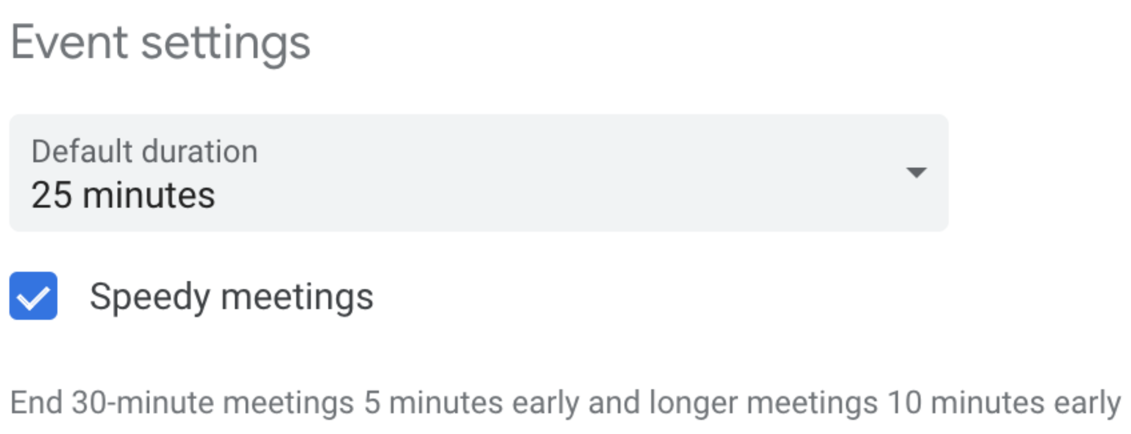
Reserve blocks of time to do focused work

Create meeting-free days every week

Just say no or delegate

Configure a 25 minutes default meeting duration

Define speedy meetings to have 5/10 minutes intervals



Blocking Calendar Slots and Meeting Free Day

Respect others' calendars

Always confirm if you are attending or not

Read the agenda and materials sent out in advance

Join the meeting on time

Host good meetings

Prepare an agenda

Avoid the status meetings

Invite only the people who need to attend (mark people as optional)

Start and end on time

Don’t rehash materials sent out in advance

Send out a summary of the next steps

Organizing recurrent meetings

Schedule recurring meetings to the beginnig of the week

Recurring Meetings

References

Ten Things: Escaping Meeting Hell
Ten Things You Need to Know as In-House Counsel®

How to Design an Agenda for an Effective Meeting
Harvard Business Review

Tips for Effective Meetings we Learned from Reading 100 articles. - Unito
Unito

Recurring Meetings

Guidelines on recurring meetings and responsibilities for the different parties involved as a way to take the most of them.

Objective:

We highly encourage you to use asynchronous communication and schedule meetings only if really necessary.

Also, note that on this page you'll find how to optimize meetings in an all-remote environment.

Having said this, the purpose of this page is to share general guidelines on recurring meetings and responsibilities for the different parties involved as a way to take the most of them.

As you go through this document note that being responsible for items does not mean having to do them, but being accountable for the items mentioned.

I - General Guidelines:

Below is a list of general guidelines for recurring meetings as a way to clarify expectations and generate alignment on Rocket.Chat recurring meetings.

1.Recurring meetings

Any meeting that happens with a regular frequency, consistent dynamic and where focus is on sharing information & generating alignment is considered a recurring meeting.

1.1.Scheduling Recurring meetings:

Unless stated otherwise recurring meetings are to be scheduled on Tuesdays. If for any reason that is not possible, the meeting should be scheduled for Monday. If Tuesdays and Mondays are not available, meetings can be scheduled for Wednesdays.

Note that this is a guideline so that we make time and focus for recurring meetings while still allowing time on the week available for mission oriented meetings and other topics.

Agenda should be shared with all participants prior to meeting.

Participants list and meeting length should be set considering the shared agenda.

1.2.Host Responsibilities:

Unless stated otherwise the host for a meeting is responsible for sharing the meeting agenda, setting the length and is expected to facilitate the meeting.

In case a new member is added to a recurring meeting, the host is responsible for sharing meeting dynamics.

1.3.Participant Responsibilities:

Participants are expected to always respond to the meeting invites with a participation status within reasonable time prior to meeting.

If attending, participants should cover their views as applicable.

If not attending or partially attending, participants should communicate to the meeting host or any other confirmed participant in advance.

II - Team Recurring Meetings:

Below are a couple team recurring meetings and information related to them.

1.One on one meetings (1:1):

Meeting between any 2 people (normally consisting of a supervisor and a direct subordinate) focused on building relationships, exchanging information, and addressing general questions & concerns (career, technical or process related).

Meeting is focused on the subordinate and ways to leverage subordinate potential.

In case 1:1 is not between subordinate and supervisor, please refer to general guidelines (section I-1.2 and I-1.3)

1.1.Scheduling 1:1s:

1:1 meetings should be scheduled for Monday or Tuesdays as a way to keep all personnel available for mission oriented meetings and other topics during the other week days.

They should be scheduled for interactions where 2 people have a high interest in exchanging information on a topic or process that is not limited to an ah hoc situation.

Time on schedule should be enough to cover the topics for the meeting and can be agreed upon by the parties involved. Recommend 1 hours duration for the 1st and subsequent times can take the development of the 1st into consideration.

1.2.Periodicity:

The periodicity should be agreed upon by the parties involved during the 1st 1:1 and can be changed at any point based on understanding from people involved.

Generally speaking 1:1 cycle should be for any period between 1 week and 1 month.

Highly recommend weekly 1:1s with any new subordinate during the initial 2 months or where there is a need for a tight alignment; for other situations bi-weekly or monthly should be considered.

1.3.Subordinate Responsibilities:

The subordinate is responsible for proposing agenda, providing information, sharing issues & concerns and recording on tools meeting outcomes.

1.4.Supervisor Responsibilities:

The supervisor is responsible for 1:1s to be scheduled, facilitate the meeting, provide mentoring or coaching, sharing information, and following up on items discussed during meetings.

2.General Team Meeting:

Meeting for supervisor to share high-level details and relevant information with all subordinates from a given team.

2.1.Scheduling General Team meetings:

General team meetings should be scheduled for Mondays, Tuesdays or Wednesdays.

All team should be invited to the general team meeting.

Duration should be up to 1 hour.

2.2.Periodicity:

General team meeting should be set for once a month or every time there is a relevant enough topic to be covered with the entire team.

2.3.Supervisor Responsibilities:

Supervisor is responsible for general team meeting to be scheduled, planning & sharing meeting agenda and facilitating the meeting. If applicable, the supervisor is also responsible for follow up on meeting outcomes.

2.4.Subordinates Responsibilities:

Subordinates should attend and participate in these meetings as applicable.

All Hands Meeting

Guidelines & Best practices for Presenters and Meeting Organizers

These guidelines were defined based on our employees feedback. It aims to improve the quality of our presentation and boost people's attention and content retention.

Objective of this forum

1) Share important information and announcements that have a large impact from a cross-functional standpoint;

2) Share some of your department's important initiatives with other departments within our company and give people the opportunity to learn more about your department's responsibilities/activities and members.

For Presenters

Guidelines

1) Share the decision-making process behind projects and activities: Based on which pillars/guiding principles did your department prioritize this initiative/project? People need to understand the logic/rationality behind decisions.

2) Transform data into valuable information: More than just explaining numbers, it's critical to explain why they matter, why they're so useful. Put yourself in the shoes of the other person and consider whether they are aware of the significance of this number. Here's an example: This month, we completed X merges on our code. So, what is the month-to-month average? Are we better than average? What does it all mean? Is there a more qualified coding script now?

3) Don't be too technical: Remember that the All Hands Meeting is an opportunity to spread the word and share key departmental information with others. Do not assume that everyone understands everything you're saying. Make your speech understandable to everyone by translating specific terminology, including a glossary/simple explanation in your presentation, or attempting to swap specific terms for more generic terms whenever possible.

4) Send the slides to the owner 24 hours before the All Hands Meeting: Every presenter should finish their slides 24h before the meeting. This will give us time to review and suggest changes according to the best practices (like adding a summary, presenter names, etc.); this also helps whoever is managing the meeting to prepare with more time in advance (not having to wait until the last minute to upload the presentation to the meeting room).

Best Practices

1) Slides information: Even though All Hands Meetings should be attended by all employees, we recognize that timezone is a challenge; this implies that if someone sees your slides asynchronously, they should be **understandable and with clear directions**. Try to include the following items in your presentation: `The name of the project/initiative, the person in charge, the status, and the next steps. It will greatly simplify our lives.`

2) Summarizing important points: Remember that you/your department is merely one of several All Hands Meeting presenters. Try to include a concluding slide that recaps and summarizes key points from your presentation. It will also help with material and attention retention, as well as future async consultations on your presentation.

3) Centralized folder in our Rocket.Chat shared Drive: We organized an "All Hands Meeting" folder in our Shared Drive in order to consolidate and build a single search for truth. Please consolidate your presentation there, following the folder's arrangement by year > month. `(Location: Shared Drive > Rocket.Chat > All Hands Meeting)`

4) Important links shared in All Hands Meeting chat: You must include the `URL of those links shared during All Hands meeting` in your presentation in a visible location to encourage access to it following the All Hands Meeting.

5) (Culture Pillar) Use this opportunity to thank your team and share critical team deliverables, giving them a voice: The leader should choose some members of your team to present a significant deliverable that demonstrates the impact of their efforts, the problems they faced, and how they overcame them. It is a method of positively exposing your team's hard work and promoting engagement of your team with the rest of the company.

For the Organizer/Owner

Important directions

1) Shared Drive Folder: The owner of this assignment must establish a new folder for the month, as well as a new document for the next presentation, in order to keep the single search for the truth up to date.

2) Ensure that Guidelines & Best Practices are being followed: We need to have someone to reinforce the importance of following those guidelines and best practices.

Meeting Planning

- **Every second All Hands meeting of each month:** OKRs track session
- **1 week before All Hands Meeting:** This is an excellent opportunity to reaffirm Guidelines and Best Practices with upcoming presenters.
- **1 day before All Hands Meeting:** Analyze the slides and make some minor changes based on the All Hands Meeting rules and best practices.
- **After each All Hands Meeting: 1)** Insert the `All Hands recording link in the All Hands Meeting folder (` Each month's folder will have a document titled "Recordings All Hands Meeting," which is where you should insert the recordings); **2)** In the `#important channel`, share the URL to the All Hands meeting folder for that month, along with instructions such as "month X" and then "day DD/MM/YYYY," to educate others on where to discover our **"one search for truth."**

Blocking Calendar Slots and Meeting Free Day

Guidelines on blocking calendar slots and setting meeting-free Thursdays.

Objective

We highly encourage you to reserve slots on your calendar and have Thursday as a meeting-free day. This is focused on reducing the context-switching of the day-to-day activities and allows you to focus on critical items.

Please note we trust each Rocketeers' common sense on making the best use of guidelines presented here.

Having said this, the purpose of this page is to share general guidelines on these calendar slot blockers.

General Guidelines

1. Blocking your calendar

1.1. Out-of-office

In case you are setting slots of time on your calendar for unavailable periods (e.g. take kids to school, doctor appointments, etc) create an event for the given period using the **Out of Office** type of event.

1.2. Focused individual work

In case you are setting slots of time on your calendar for focused individual work, place an event calendar entry on your agenda starting with the title **Reserved** or **Blocked** and set its duration.

Blocked periods should never be used by others unless it's an emergency and no other slot is possible for the situation. When it happens it's important to talk to the person and ask permission to use the blocked slot.

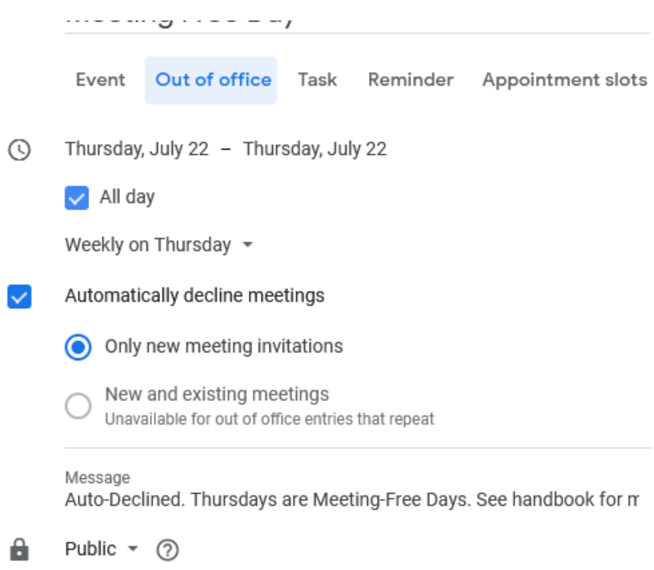
Reserved periods can be used for meetings then no other available time is possible to be used, it indicates non-preferable periods for meetings in order to concentrate them in other moments but can be used for **non-recurrent** meetings if necessary (e.g. recruiting meeting, training session, etc).

2. Meeting-Free Thursdays

For meeting-free Thursdays set a public **Out of Office** calendar entry for a **full day** starting on any given Thursday.

> ⓘ Please note at this point this is being used only by **Engineering Area**.

You can set it to automatically decline meetings and the automatic message `Auto-Declined. Thursdays are Meeting-Free Days. See handbook for more details: https://go.rocket.chat/i/meeting-free-thursdays`


Event
Out of office
Task
Reminder
Appointment slots
Thursday, July 22 – Thursday, July 22
All day
Weekly on Thursday
Automatically decline meetings
Only new meeting invitations
New and existing meetings
Unavailable for out of office entries that repeat
Message
Auto-Declined. Thursdays are Meeting-Free Days. See handbook for m
Public

Reporting Product Issues

Please find details on how to report product issues here.

To avoid the same product issue being reported in multiple channels, it's important to keep it centralized in one single place. This way, it's possible for the reporter to keep track of the progress and the product team to work on the issue in an organized way.

To report an issue:

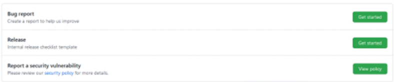
· Click `here` to get to our github issues page and check if the issue has already been reported. If it has, and you don't have anything new to add, keep track of the resolution progress. If it has already been reported and you have something to add, please add it as a comment.

· In case the issue has not been reported yet, submit your issue/bug using below steps.

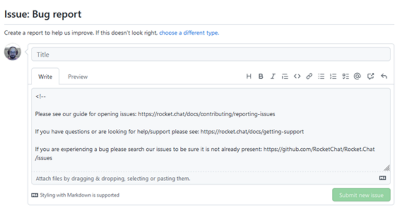
Steps by step to report an issue:

1-On Rocket.Chat github main repo issues page (https://github.com/RocketChat/Rocket.Chat/issues) click on “New Issue” button on the top right of the screen.

2-Click on “Get Started” button on the Bug Report lane



3-Give a good title to your issue and fill in the form from github.



4-When you are done, please click on the “Submit new issue” button.

Departments and Operations

🏗️ Research & Development

Release Cycle

What’s a release?

The release is every version of the app that’s sent to the store as a production release. The release is always a major/minor update, like from (1.0.0 to 1.1.0 or to 2.0.0). Patch releases (from 1.0.0 to 1.0.1) won’t follow this steps and are considered hotfixes releases. Our versioning is following the Semantic Versioning 2.0.0 guide.

How is our release cycle structured?

We choose to have fixed monthly releases, that means that under optimal circumstances we’ll have only one release per month. Each release should follow a specific life-cycle consisting of four distinct phases: *planning, construction, validation, release.* Usually *validation* and *planning* phases overlap.

- **Planning** `~5 work days`
  - Issue triage workgroup
  - Backlog grooming
  - Identification and refinement of requirements
  - Technical agreement
  - Planning session
- **Construction** `~15 work days`
  - Development
  - Write technical documentation (at least at draft level)
  - Peer review
  - Final review & merge
- **Validation** `~5 work days`
  - Get feedback
  - If the product needs further polishing start a new construction phase micro iteration
  - If there’s “free time” (release is doing fine), work to improve tests and technical debt, new ideas, experiments or features/improvements to the next release cycle
- **Release** `~3 work days`
  - Generate changelog
  - Review and polishing of technical documentation
  - Write a blog post about the changes, fixes and new features
  - Release final version of the product

What are the important days of a release?

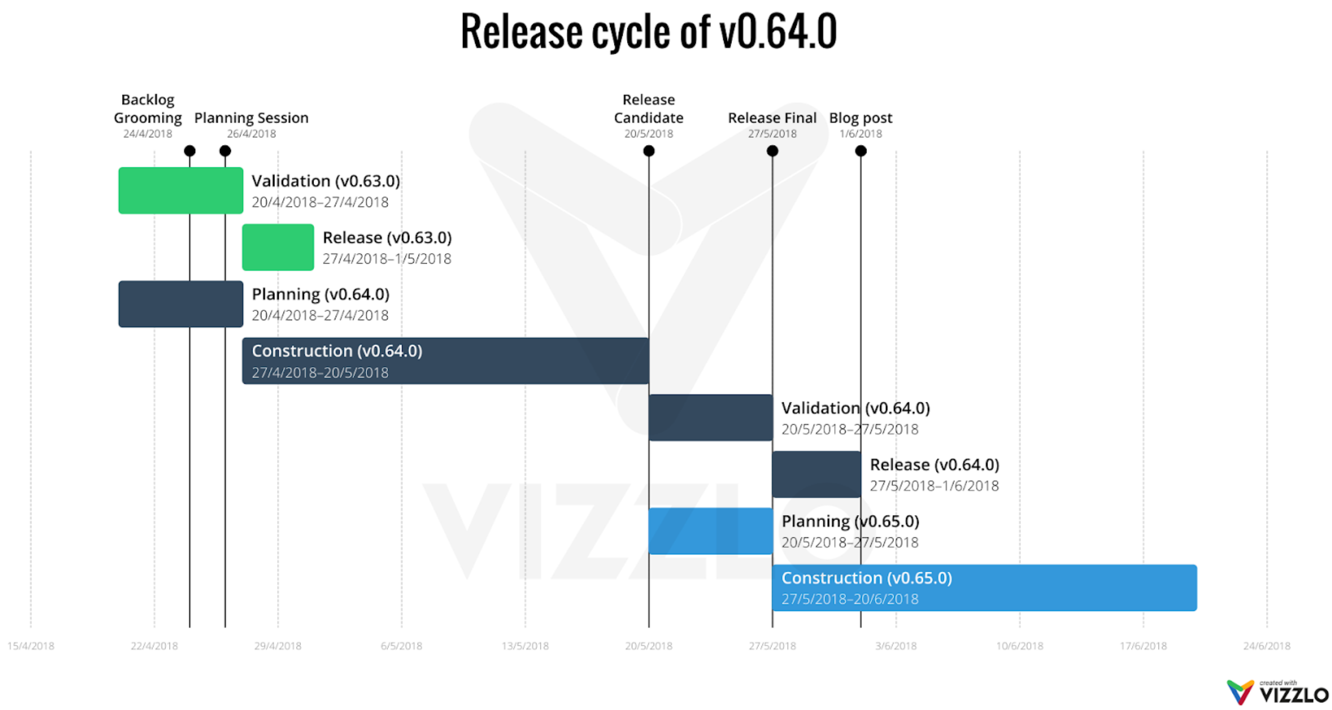
The first release candidate (TestFlight and Beta) needs to be done by the 20th of each month. The release will most frequently happen on the 27th day of each month unless there’s some critical crash/bug or some unforseen circumstances, then it can be shifted.

What happens if something could not be done in time for the release candidate?

In general, if it’s a new feature, it’ll be postponed for the next release only. Under extreme circumstances, when it will result in significant business impact a extraordinary release could happen.

When do we plan the release features/improvements/bugs?

Every month can be a different day between 20th and 27th to plan the next release. The leader of the team will schedule the team and the all team will be able to participate of the planning. At this moment, most of the issues will be assigned to each member of the team. As we can see in the following example (in April, 2018):



chart

How do we organize a release?

Every release is a project in GitHub. There are 6 columns on each project (board):

- **Desirable (temporary)**: what we want to have on the release. This is very useful while planning. This is where everybody can add features/improvements that wanna see on the release;
- **Blocked**: when something is blocked (waiting asset, waiting API, etc) the issue will be on this board;
- **To-do**: after planning, all to-do issues come here;
- **In progress**: when something is in progress, the issue/PR will be on this board;
- **Review/QA**: when something is done and waiting for review or waiting to be tested, the issue/PR will be on this board;
- **Ready to Merge**: when PR is reviewed and approved it will be o here waiting to final adjustments (title, related issues, etc) and merge;
- **Done**: when the issue is closed (merged), the issue/PR will be on this board;

What happens with PRs and Issues not listed in a release?

Pull Requests and Issues not listed in the board will not be merged to that release. If some PR or Issue should be evaluated, reviewed or merged it should be listed in the board at the appropriated column.

What happens when the release candidate is shipped?

All changes in develop needs to be merged into the branch release-candidate at this point. A new tag needs to be created following the pattern: `2.1.0-rc1`.

All the remaining Issues and PRs in the current board should be moved to the next board and assigned the the label `board-postponed`, leaving the current board for Issues and PRs related to the release candidate process only.

What happens if there's no bug/crash on the release candidate?

That's great, congrats! This time can be used in a creative way: write more tests, code maintenance that sometimes is required, resolving issues to the next release, planning, ideas and experiments.

What happens when a release candidate fix is not done before the release?

The fix will be shipped as a Hotfix Release, see the `Hotfix Releases` section.

What happens when the release is done?

Project and milestones are closed, all the changes are merged to the branch master and the tag is created, following the release pattern of the repository.

Hotfix Releases

When a hotfix release happen?

A Hotfix release will happen when a critical bug or crash is found in the production version of the app.

How to handle hotfix releases?

Simply open an issue on GitHub describing the issue, the issue is usually closed from a pull-request getting merged and a new milestone is created with the minor update, including all PRs required to the hotfix be completed. Once the milestone is completed, it can be closed and the release tag can be created.

Check more

Review Guidelines

Development Guidelines

Product

Technical Writing

Rocket.Chat Documentation Guidelines

If you are a new Technical Writer joining our team or a community member who wants to contribute to Rocket.Chat documentation, here are some actionable writing guidelines you can apply to make your writing in tune with our documentation. They may seem painfully simple and obvious, yet if you ignore them repeatedly in your piece, the document might lose its tone/purpose.

Introductions

Provide introductions: A good introduction should identify your topic and provide essential context. It also needs to engage your users' interest. For technical topics provide a strong non-technical context that demonstrates value proposition and provides motivation.

Body

- Use simple, short sentences.
- Address the user in second-person pronouns, **you, your, yours, yourself, yourselves** instead of **the user.**
- Refer to admin user as **'administrator'** or **'workspace administrator'.**
- Refer to Rocket.Chat server as, **'workspace'** or **'your workspace'** or **'your Rocket.Chat workspace'**.
- Try starting actionable instruction with a verb. (e.g., “Click **Submit**…” [Correct] vs. “Click the Submit button…” [Not Preferred]).
- Use the actual names of UI components only, not their types. (e.g., “Click **Submit**…” [Correct] vs. “Click the Submit button…” [Not Preferred] OR "Turn **Enable encryption** on" [Correct] vs. "Turn on the **Enable encryption** toggle" [Not Preferred]).
- The future tense does not have the same immediacy as the present tense. Compare “When you connect the power cable, the device will boot up automatically” to “When you connect the power cable, the device boots up automatically.” The future tense suggests a mild uncertainty as to how things unfold.
- Use Active Voice whenever possible (e.g., “You can change these configurations by…” [Active] vs. “These configurations can be changed by…” [Passive]).
- Convey value but stay factual.
- Always spell check for typos and grammar check for polish. Rocket.Chat provides a Grammarly business account. Get in touch with your leader to get yours.

Info blocks/callouts

Avoid partial content references.

Call-outs should be used for external dependencies or prerequisites. Below are a few good examples of info block usage.

> Matrix support in Rocket.Chat is currently considered alpha. Expect bugs.

> Users need to set up a Matrix homeserver and a dendrite server

Screenshots

- Avoid screenshots at all costs. With our new versions coming regularly, they can easily get outdated. Be descriptive in your writing and explain every step/navigation with words.

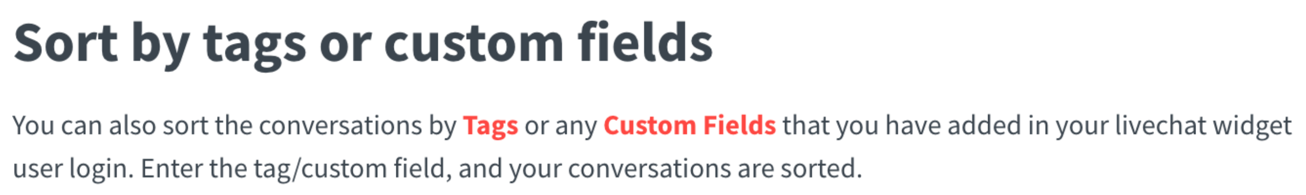
External references

- Official documentation: When you are referencing portions of the external official documentation, give links to those documents instead of copying content from them.
- Forums/Discussion: When you are referencing something from a forum/discussion, document the hack/fix that worked for you and give the link to the discussion as well so your readers can follow if the discussion evolved after you documented it.

Document Flow

Make sure that information is provided organically. Always assume the user is new to the Rocket.Chat. Start every document with edge-case in mind.

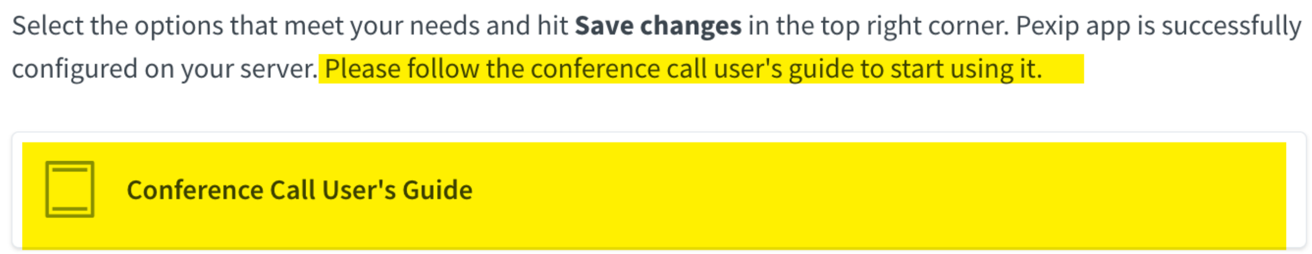
- A prerequisite step is given first. (e.g., “If you are using the conference call feature for the first time on Rocket.Chat, contact your administrator, or follow the admin guide linked below to configure conference calling on your Rocket.Chat instance.")
- If you are referring to another feature within the document you are writing, assume that your reader does not know about it and give a permalink to the documentation of that feature, as shown in the example below:



Sort by tags or custom fields

You can also sort the conversations by **Tags** or any **Custom Fields** that you have added in your livechat widget user login. Enter the tag/custom field, and your conversations are sorted.

- Maintain the flow of the feature and give any next steps, as shown in the example below:



Select the options that meet your needs and hit **Save changes** in the top right corner. Pexip app is successfully configured on your server. Please follow the conference call user's guide to start using it.

Conference Call User's Guide

Next step

- Use headings, bullet points, and links to break up information into chunks, not long explanatory paragraphs.
- Actionable items in a bulleted list should not end in a full stop.
- Use tables and diagrams, not sentences, to represent information with multiple dimensions.

Engineering

Engineering team

Engineering Important Definitions

I - Purpose of this document:

Define key concepts that are regularly mentioned by engineering.

II - Key definitions:

A - Breaking Change -> Breaking Changes are modifications to code that impact functionality of a Rocket.Chat component and require other people/applications, that are using the affected resources, to make a corresponding change to prevent dependent items from stop working. A few situations that generate breaking changes include, but are not limited to:

- Changes to a method signature;
- Changes to the behavior of a method;
- Changes to settings/configuration;
- Deprecated items.

B - Bug -> Bugs are defects or miss behaviors experienced by end users on a released version of Rocket.Chat;

C - Deprecation -> Process of taking older code and marking it as no longer being useful within the codebase, usually because it has been superseded by newer code, and will be removed from the codebase;

D - Long Term Support (LTS) -> Identify the last minor version before a major version, e.g. 2.4 is the last minor version before 3.x. A new major version means that the version introduces breaking changes and requires attention to the upgrade, so we maintain the support of the previous version for a longer time in order to give the user more time to plan and test the upgrade to the new major version;

E - Beta version -> A pre-release version of Rocket.Chat. When in the end of the development cycle, the Engineering Team will release a candidate version to be tested internally;

F - Regression -> Similar to bugs, but on it affects only beta versions of a release. Regressions are defects encountered on pieces of software/functionality that is **NOT** yet on a released version of Rocket.Chat, i.e., the issue was introduced in the current development cycle.

Roles and Responsibilities

This page aims to describe the roles and resposibilities for the Engineering team at Rocket.Chat.

Backend Engineer:

Rocket.Chat's backend engineer's main goal is to design and build solutions that are secure, with low latency, high availability, and high performance for our products to enterprise customers and the open-source community.

People in this role will work with the engineering team within a squad, product, design and our community on initiatives developing new features and improving existing features for both self-service and SaaS.

Responsibilities:

- Develop features or improvements to aid Rocket.Chat on meeting customer & community needs;
- Work with the product and engineering team on different initiatives;
- Identify blockers on processes or software;
- Be a Rocketeer and embody company values in all interactions (internal and external) when representing Rocket.Chat.

Frontend Engineer:

Rocket.Chat's frontend engineer's primary goal is to build solutions for our corporate customers and community that provide an above-the-market user experience in a reliable manner, regardless of the device or platform being used by the end users.

People in this role will work with the engineering team within a squad, UX team and our open source community to deliver different business-prioritized features.

Responsibilities:

- Develop features or improvements to aid Rocket.Chat on meeting customer & community needs;
- Work with the product and engineering team on different initiatives;
- Identify blockers on processes or software;
- Be a Rocketeer and embody company values in all interactions (internal and external) when representing Rocket.Chat.

SRE Engineer:

Rocket.Chat's Site Reliability Engineers are continuously ensuring that rocket.chat underlying infrastructure is running smoothly and that systems and tools are working as expected in aid of our internal squads and customers. They also monitor critical applications and services to minimize downtime and ensure their availability.

Responsibilities:

- Preventive maintenance of our environments
- Monitoring of logs and metrics
- Work with the product and engineering team on different initiatives.
- Identify blockers on processes or software.
- Continuous work towards Infrastructure as a code and scaling our solutions.
- Be a rocketeer and embody company values in all interactions (internal and external) when representing Rocket.Chat

PTO Best Practices for Engineering

I - Purpose of this document:

Share best practices for handling PTO of 4 or more days as a squad.

II - Other Documents:

There is another important documentation in the handbook when the topic is PTO. Please check it as well:

A - Guide to PTO -> https://handbook.rocket.chat/departments-operations/people/daily-life/pto-guide

III - Best Practices for Engineers:

- Check squad agenda for the period you are thinking about taking the PTO;
- Check with other squad members if they are able to cover your activities during your PTO period;
- Speak with your manager before submitting items on Zoho sharing who will be able to cover your activities during your PTO;
- Set Out of Office notice on your google calendar, blocking your agenda for any new meetings;
- Decline existing /recurring meetings for the period you will be on PTO to show you will not be available. (RSVP as No -> Select option “This event” + As possible place a comment);
- Post a message about your PTO with the following template at your squad channel:

> *“I’ll be on PTO from DATE1 to DATE2, and back on DATE3.*
>
> *During my absence please check below people for progress on items:*
>
> *Name 1 - Activity 1*
>
> *Name 2 - Activity 2*
>
> *Name n - Activities n"*

- A couple of days before going on PTO, set a meeting with each person that is covering your activities to share context and cover any questions;
- Share with the team on thread for your PTO or directly with people covering links to documents such as ADRs, figma links, jira tickets and others that might help them get context;
- If it is a short period of PTO (one or two days), make sure your tasks are all done or addressed before going on PTO, or that you will be able to complete all of them before the end of the sprint.

IV - Best Practices for Managers:

- At the beginning of each month send at squad channel list of people that will be on PTOs with dates;
- Post in the thread related to month's PTO list any relevant updates to the list;
- Confirm with engineer requesting PTO who are main coverage contacts;
- Make sure requested PTOs are properly handled on official tools;
- React to messages posted by engineers related to PTOs as a way to acknowledge them;
- Follow up with engineers to confirm all is properly set for PTOs.

Mobile

Purpose

The Mobile Team is responsible for Rocket.Chat's mobile applications available on App Store and Google Play. We seek to deliver fast and easy-to-use mobile applications to our customers.

Contributions

Repository

Most of our contributions will be focused on our main repository, but sometimes we need to contribute to other repos while working on our main.

In those cases, we need to open a PR to the other repository, apply the changes to our main repository based on the other repo's PR, and adequately document what needs to be reviewed on the description. After approval, the developer needs to merge the other PR and update the main one before merging and submitting for QA again if necessary.

Default branches

- `master` branch is the code already in production. Every push to this branch is made during the release process after the new app version is already on App Store and Google Play. The code can only be pushed to this branch by the Release Manager.
- `beta` branch is the version submitted to Google Play beta and TestFlight during the *beta period*. Before submitting our apps to production on the stores, we submit them to beta, so we can properly test, QA, and evaluate the final delivery. This beta release is first generated by creating a PR from the `develop` branch to `beta` branch, making sure the new release will be up-to-date with the development cycle. If we find issues during the beta period, we'll only cherry-pick **fixes** to `beta`. The code can only be pushed to this branch by the Release Manager.
- `develop` is the default branch on the repository, therefore changes to the code will be most likely pushed to this branch.

Merging process

After the development is done, the author needs to get the pull request reviewed. We require only one approved review to get the PR ready to merge, but the number of reviewers should vary depending on the complexity of the PR.

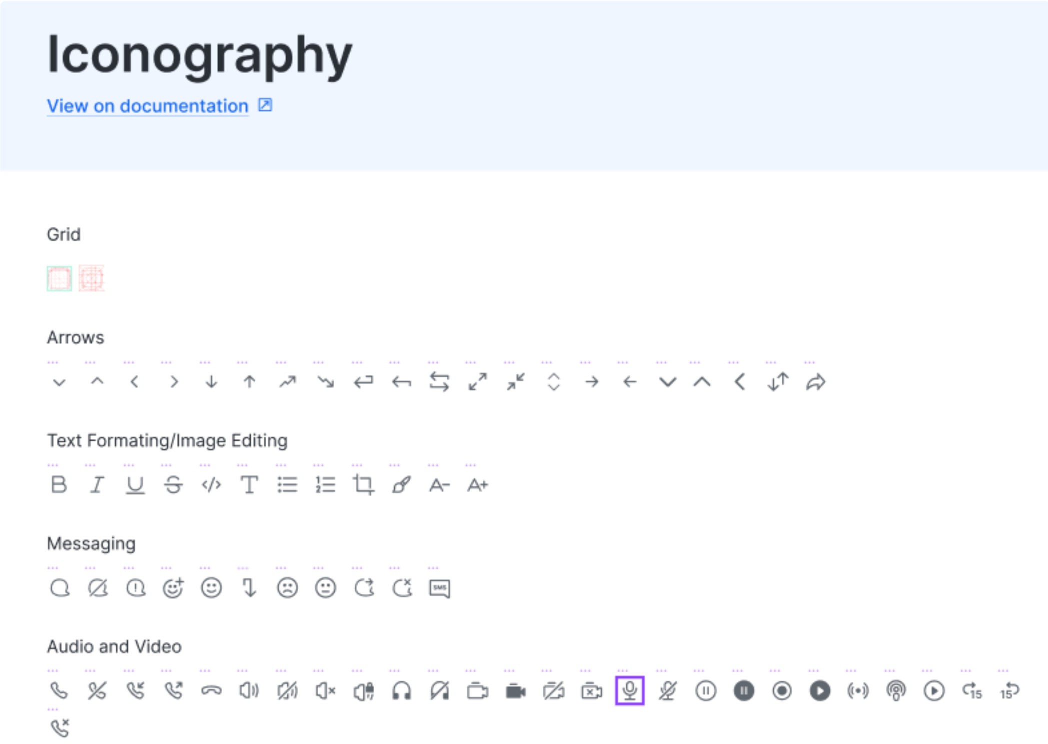
After the PR task is approved on Jira and the PR passes the required statuses on Github, the author can merge it. Remember to `Squash and Merge` so one PR with multiple commits is merged as only one commit on `develop`. Remember to double-check the PR title is following our guidelines before merging. The author is in charge of getting their PR merged.

How to update icon set

This document explains how to update the icon set based on Figma Iconography.

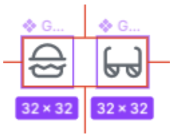
Figma Iconography

Here we have the Iconography source of truth, so every update needs to start from there.



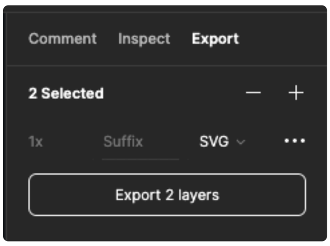
Iconography Figma board

- Select the icons you want to add/update
  - **Tip:** Select only the icons you want to change *just to be safe.*



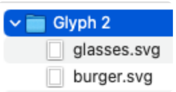
New icons

- Go to `Export` on the right panel, select `SVG` and click on `Export N layers`



Exporting icons on Figma

- It should generate a `Styleguide.zip` file on your machine containing the files

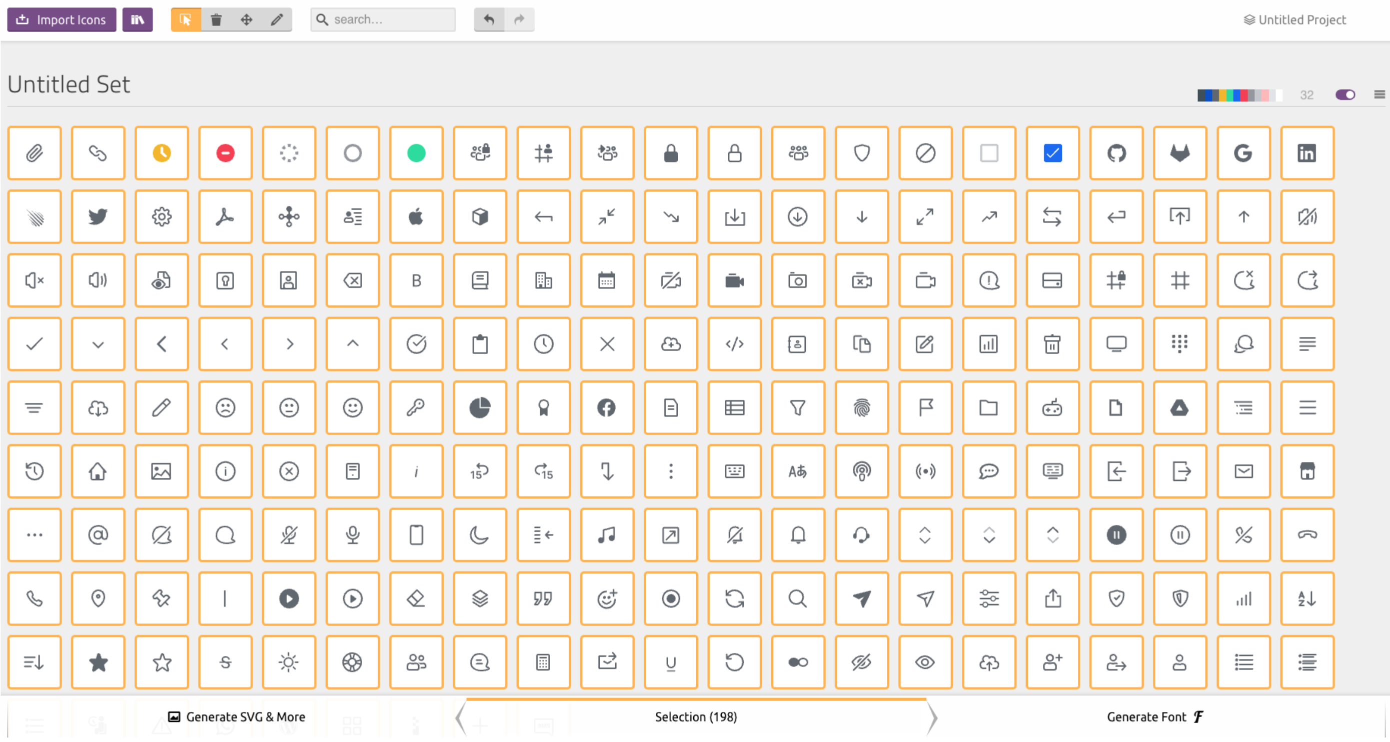


Exported icons on file system

Icomoon

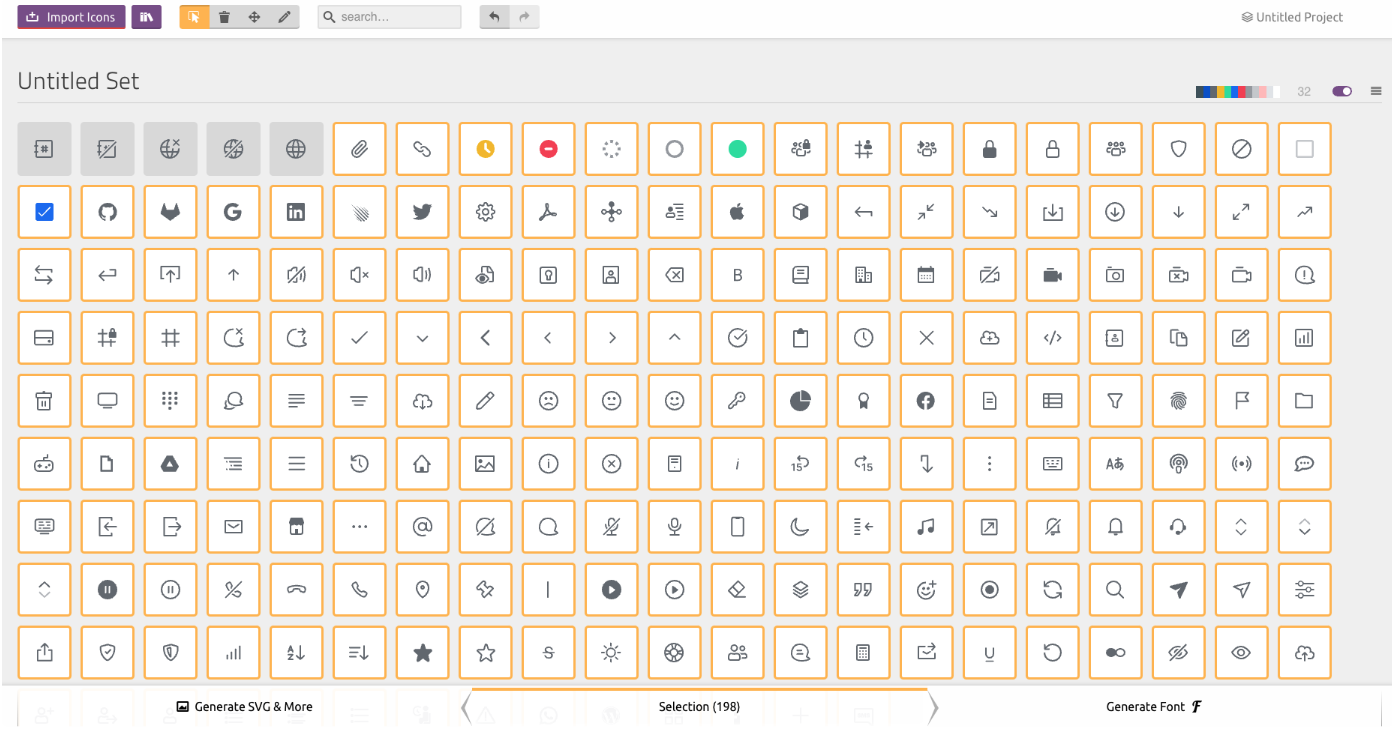
We use Icomoon to generate our `.ttf` font file.

- Here's a Google Drive folder containing all versions of the icon set
    - Download the most recent one
- On Icomoon, click on `Icomoon App` and then `Import Icons`
- Select the `.json` file you just downloaded



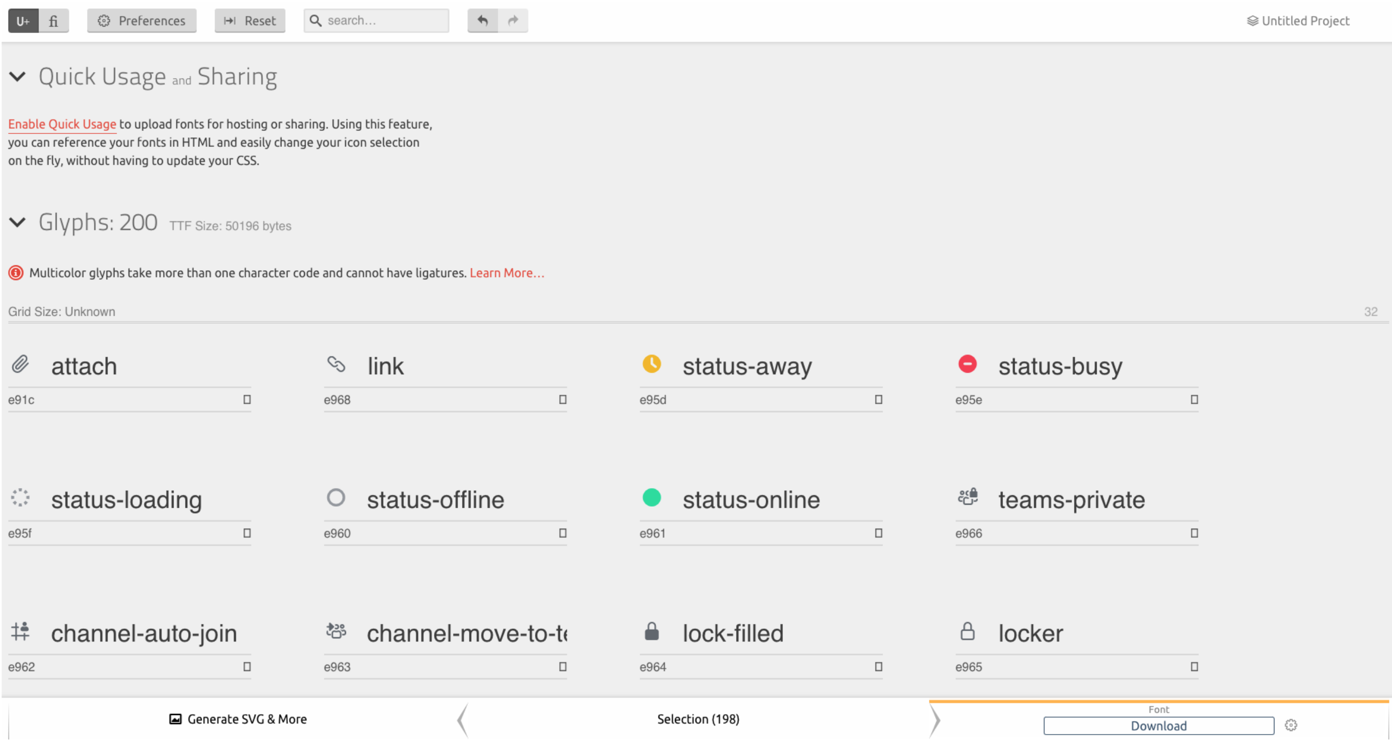
Imported Icon Set

- Drag and drop the icons you want to add/update to Icomoon
- They should appear as unselected



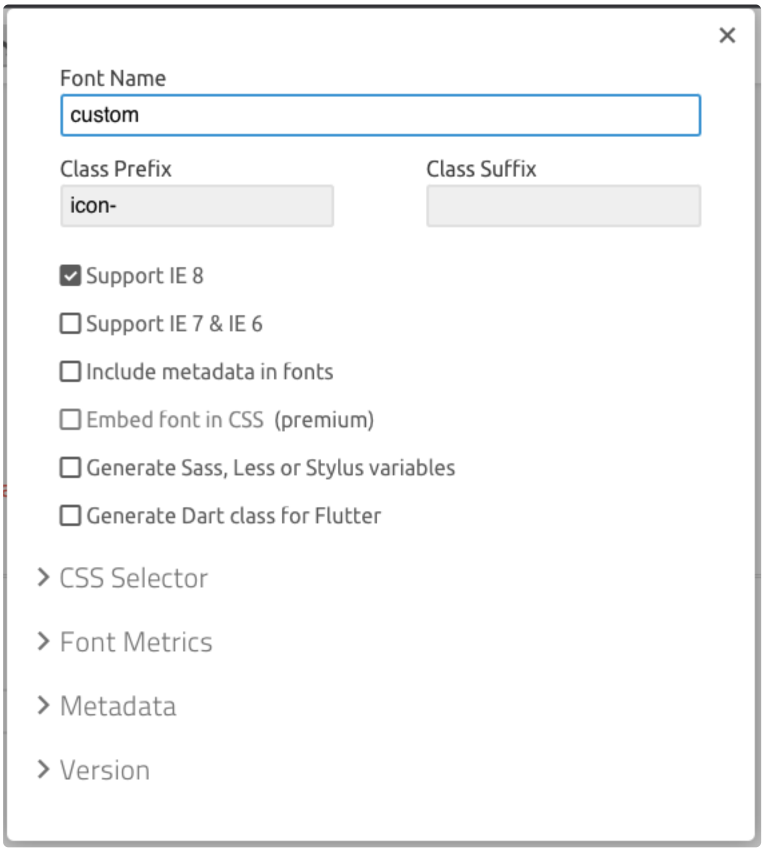
Icon Set with unselect icons

- Select them and click `Generate Font`



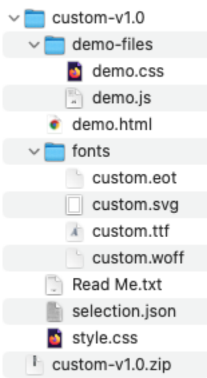
Generate Font screen

- Click `Configure` (gear icon) on the right side of `Download`
- Change the `Font Name` to `custom`



Configure screen

- Close this modal and click `Download`
- It should have generated a `.zip` file with the following content



Unzipped custom icon set

- The only files we're going to use are `fonts/custom.ttf` and `selection.json`
- Now we need to update the Google Drive folder
- Click on `Untitled Project` on the header of Icomoon and then `Download`
- That should download a `.json` file to be used next time we need to update the icons again
- Make sure to rename it following the `Mobile Icons vN.json` format and upload it to the Google Drive folder

Updating the app

- Move and replace the new `selection.json` to `app/containers/CustomIcon/selection.json`
- Move and replace the new `custom.ttf` to `android/app/src/main/assets/fonts/custom.ttf` and to `ios/custom.ttf`
  - **Tip:** Don't use Xcode to replace files, because otherwise, you're going to change the links inside the project. Doing it from VSCode, for example, does the job without touching `ios/RocketChatRN.xcodeproj/project.pbxproj`
- Go to your terminal and run from the root folder of your project `yarn build-icon-set` to update the mapped icons for Typescript
- Now build the app again and try the new icons

Apps-Engine

Purpose

The Rocket.Chat Apps Team is responsible for the Apps-Engine framework, which allows developers to make plugins (apps) to extend Rocket.Chat's functionality without having to deep dive into the core codebase. Along with the framework itself, we work on official integrations through the Apps-Engine, maintain the tooling around it and integrate Rocket.Chat with our Marketplace.

Processes

We're running some experiments on how to run your development processes, based on some practices from the Agile methodologies.

Currently, we have a 2-week sprint, from Tuesday to Monday - within which we have a **Planning**, a **Retrospective**, **Grooming**, and **Daily** sessions.

- **Review/Planning - Every other Tuesday at 10am (BRT) -** At the beginning of the Sprint, we go over the previous one, checking what tasks we completed and if there are any we need to carry over to the current - this is the *Review*. Then we move to the actual *Planning*, where we allocate the work we agree seems to fit the Sprint.

> In cases where we need to carry tasks over, it's important to assess honestly what happened so the team can prepare actions that prevent this carrying over from happening again. It's not a problem to carry things over, the problem would be missing opportunities to learn and improve

- **Dailies - Every day at 9:45am (BRT) -** We follow the "standard" format of the Scrum Daily ceremony. Every team member shares the progress they had in their tasks in the previous day, the plans for advancing in the current day, and if there are any blockers.
- **Retrospective - Every other Friday at 10am (BRT) -** We do it at the end of every Sprint. We go over the accomplishments of that specific Sprint, and then discuss what has worked and what can be improved in the process, coming up with action items we need to achieve those improvements.
- **Grooming/Discovery - Every Friday at 3pm (BRT) -** In these sessions we go over any initiatives we have in your short-term roadmap, breaking them down into tasks and assigning them estimated Sprint Points. This is a good opportunity for us to discuss with the team the technical details of the approach we'll take when implementing those tasks.

Important notes

- You SHOULD check Rocket.Chat for announcements or to answer any pending questions when you start working and before you finish your shift **at least**. You are, of course, encouraged to engage in any conversation on your channels whenever you like. Please note you are not expected to be *always* active in chat. Everyone needs time to focus on the task at hand, this is just a rule of thumb so you don't miss out or leave anyone hanging/blocked.
- You SHOULD push your code to the *upstream* before you finish your working hours. This way, if anything critical happens, someone else can take over the task you were working on if needed.

Contribution Workflow

Github

New contributions will most likely start with a new git branch. We don't have strict rules for naming a branch, but here are some suggestions:

- `feat/*` ****if you'll be working in new feature
- `fix/*` if you'll be working on a fix
- `regression/*` if you'll be working on a regression in the current release
- just use a custom name, without the "folder format", if it doesn't fit the suggestions above

When opening a PR in any of our repositories, follow the guidelines in Development Guidelines.

Multiple Repos

Often we'll need to open a PR in more than one of the Org's repos when introducing a new feature. That happens, for instance, when adding a new feature to the Apps-Engine, because it hooks itself into many points in Rocket.Chat so they can provide Rocket.Chat Apps with functionalities.

Whenever you have to commit code to more than one repo, keep in mind the following guidelines:

- **Start your PRs as a draft when they depend on modifications from other repos.** Example: You're changing an API in the Apps-Engine, which also requires you to change how Rocket.Chat handles it. The PR in Rocket.Chat needs to be started as a draft and can only be ready for review **once the Apps-Engine version has been updated to the latest version containing the API change** __(either a *patch* or an *alpha*).
- **Make sure the PRs reference each other in their descriptions.** Reviewers will need the full context of your contribution to properly review them, so they need to know the PRs in the other repos.

Backend

Purpose

The Backend Team is responsible for Rocket.Chat's core development, being responsible for things like the REST and real-time APIs, login integrations such as OAuth, LDAP and etc, mobile and desktop notifications and so on.

Forum

There's an internal category in our forums. It's encouraged that everyone share ideas and problems there in form of discussion. It's the preferable way to communicate long discussions with your team. All discussions on this category are private.

Community

Everyone on the team is responsible for taking care of the community issues and questions. Everyone has the same responsibility and we value very much being clear and responsible to them. Our community is super important to the company.

Other Activities

- You SHOULD check Rocket.Chat for announcements or to answer any pending questions when you start working and before you finish your shift **at least**. You are, of course, encouraged to engage in any conversation on your channels whenever you like. Please note you are not expected to be *always* active in chat. Everyone needs time to focus on the task at hand, this is just a rule of thumb so you don't miss out or leave anyone hanging/blocked.
- You SHOULD push your code to the *upstream* before you finish your working hours. This way, if anything critical happens, someone else can take over the task you were working on if needed.

Cloud

Purpose

The Cloud team delivers important features for Rocket.Chat users around the world. We are responsible for the easiest way to try and use our Rocket.Chat via the cloud. To access our omnichannel services, gateways and many other critical services. We plan out new services, and build them to run in a highly available way. We plan, manage and secure our infrastructure for our external and internal services. We learn how to best Deploy Rocket.Chat. We use our knowledge to develop solutions for customers to deploy. We strive to make our services run seamlessly with self hosted workspaces and augment their experience. We are tightly related to the success of the company.

Some of the services we build/run are:

- Push Gateway
- Fleetcommand
- Marketplace
- Statistics Collector
- Cloud Hosted Workspaces

Development

Migrations

Bu default migrations are complicated. When writing a migration, thinking about the current data structure, design something that converts to another structure in an efficiently way is difficult.

When we are undoing a migration, things can be MUCH more difficult:

- There may not be a way to restore deleted data.
- Even if we write a rollback code, when we do a rollback to a previous image the code doesn't exist!
- Migrations are versioned within Rocket.Chat does not run unless it has the correct version defined in the database.

That means that if you do a version upgrade and you find a problem you will be stuck on that version, you will need some manual intervention to go back to the old version.

To help us with tests and new features inside rocket.chat we have continuous deployment processes, that given a certain frequency the code is automatically applied on some servers, in case there is a problem and we need to revert and this version contains a migration a manual rollback is required, that can be painful for the process.

For all these reasons, our recommendation is to avoid migrations, but we know that this is not always possible. Ideally, you prepare your code to work without migration. If you don't want your delivery to be delayed, split the code and migration into two or more pull requests.

So the functionality can be merged immediately and migrations can be performed at some point with more planning and control.

ClickUp Guidelines

We use Clickup as our main work-tracking tool. It gives us good visibility on the things everyone's working on and also to keep track of important conversations

Backend

Each task will start in `TO DO`. That means no one is actively working on it. You can take any task from this list that's not currently assigned to someone.

As soon as you get something to work on, you should change the task's status to `IN PROGRESS`.

If, during your development, you find something that you cannot workaround or you have an important question, you should update the status to `BLOCKED`.

- When doing this, remember to **leave a comment** with the reason for the block or with the questions you have

When you finish the development, you should move it to `WAITING REVIEW`.

- Don't forget to set the task owner or the team leader as a reviewer in GitHub
- If you're not sure to whom to request a review, make sure to add a comment on the task linking the PR.

When you are reviewing a task from someone else (doing code review), you should change the status to `IN REVIEW`.

- If the review is OK (no comments or questions, and everything is working out properly), you can now move the task to `DONE`.
- Else, notify the developer and move the task to `CHANGES REQUESTED` . The dev should then move it to `IN PROGRESS` when they restart work on it.

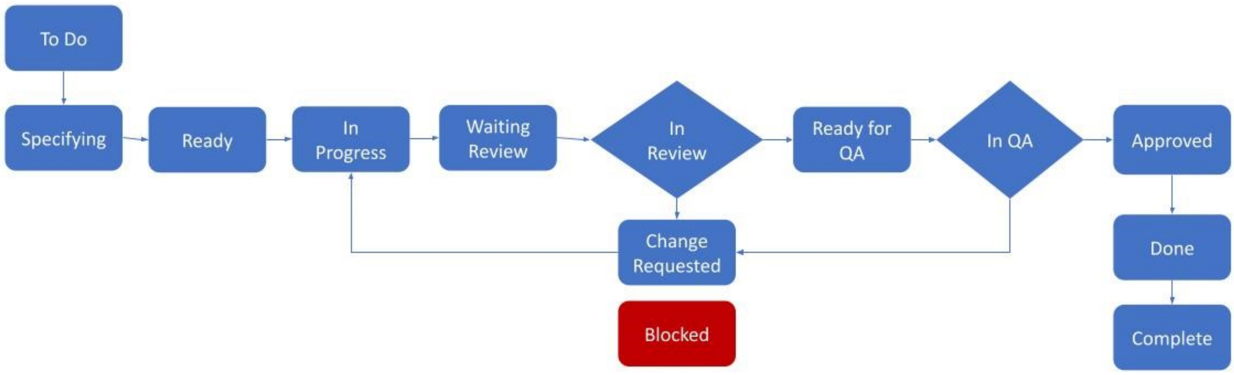
ClickUp Process and Status Changes

The document aims to share details on different statuses on ClickUp and expected activities related to these statuses.

Flow of Work:

Below you find the flow of work starting on “To Do” and ending on “Complete”.

Please note it's not mandatory for an item to go through all this status, but it’s expected for items to move from left to right on the flow to keep communication and alignment with sprint goals.



Description of Status and Flows

To Do Status:

To Do item is any item brought to the backlog. This status means a backlog item has been created, and a title and person reporting should be described on it.

Specifying:

Specifying status is any backlog item undergoing further requirement analyzes so that engineers can have clarity on what needs to be designed and built. It's expected on this phase to have items properly placed to the chapter that will be required to work on it and any dependencies.

If needed, a new backlog item can be created to split the existing item into multiple streams of work/features that better contemplate the needed effort to have the item completed.

Ready

Ready status means an item has received all needed specifications and is waiting for prioritization and assignment to a developer during a sprint.

In Progress

In Progress status means an item was picked by the engineering team for solution design and coding. Item progress should be reported during team daily standups, and comments should be placed for any major updates. Multiple engineers can work on a backlog item that is on **In Progress** status as needed. But one should be assigned as owner.

Waiting Review

Waiting Review status is used when backlog item coding has been completed and it’s waiting for secondary review by another engineer. (aka peer review)

In Review

In Review status is used to show that an item is under secondary review. Comments should be placed on the backlog item card to indicate progress for this task and this also should be reported during daily standups.

Ready for QA

Ready for QA status means an item followed stream B of workflow and will require further analysis by QA team. When item is moved to this status squad, QA should be assigned to the backlog item so that a notification is sent. As items move to this status this should also be shared during daily meetings.

In QA

In QA status means an item is undergoing QA activities. Comments should be placed sharing testing scripts and any findings.

Change Requested:

Change Request status means an item was not approved during secondary review or QA review and will require further coding to match needed backlog item acceptance criteria. Comments should be placed by engineers who performed secondary review or QA analyst outlining needed changes to design/code and any other reasons for code to be on this status.

Any item placed on this status needs to go back to In progress status before moving to the next stages of this workflow.

Approved

Approved status means an item followed stream A or B from after **In Review** and matches all acceptance criteria. Item can be merged if applicable as it gets to this status.

Done

Done status means an item was merged (if needed) and can be deployed during release.

Complete

Complete status means an item was properly documented and is available on a package related to a release on Github.

> Production-ready on Rocket.Chat is a release bundle available for customers to apply on the self-managed or available to upgrade from SaaS solution – requiring customer action to have any changes effective.

Blocked

Blocked status shows an item is blocked and requires blockers of any kind for further actions. Any status except for Complete can go to Blocked and vice-versa. Backlog item assignee is responsible for placing comments related to blocker and sharing with the team what is needed for blockers to be removed.

Engineering Work Prioritization

Purpose: This document contains relevant information related to best practices on how engineers should prioritize work during the different moments of releases & sprints.

I.Regular Sprint Days:
Period during sprint where we do not have any special events or engineering wide activities like release candidate, freeze or engineering day.

During Regular Sprint Days:

Focus should always be in this order: Changes requested > Waiting review > To Do.
Inside these 3 steps, we should also always follow the task priority (red > yellow > blue >none). There is no exact "do this all the time" rule, but should guide you most of the time.

II.Freeze Period:
Wider engineering period, between release candidate first cut until actual release of Rocket.Chat latest major or minor release.

During freeze Period:

Focus should still follow the same principle, but now for only Milestone marked tasks. Once all milestone marked tasks are done, and no regressions are left, we resume "regular sprint day work".

III. Engineering Day:
Wider engineering period, lead by chapters where engineers are expected to work on Engineering priorities, PoC, Tech Debt & Documentation; All focused in scaling engineering.

Engineering Day Period:

CTO assigned priorities > Chapter Lead assigned priorities > Tech Lead Priorities > Own initiatives.

Please note this is the most flexible one and you can always reach chapter lead/engineer manager to discuss items and reprioritize the Engineering Day priorities for your squad and yourself.

IV. Important remarks regardless of period:

1.Remember that tasks assigned to you are your responsibility and require your attention to keep moving ahead on the cycle. The PM/Manager/Lead will help with this up to a certain point and guide which should be the priorities, but this "help" should be minimal from their side.

2.If your task has a problem which you don't know how to solve, needs PM/Lead advice, is blocked for any reason, you should be contacting someone to unlock this task as earlier as you can.

Development Guidelines

Setup

Your development workstation needs to have at least 8GB RAM or more to be able to build the Rocket.Chat's source code.

This project is a mono repo, composed of several sub-projects, but the main objective/focus is Rocket.Chat as a single build, so for now all scripts are focused on this result.

We have some restrictions in terms of versions and tooling, **please pay attention to this detail.**

> We recommend using yarn

```
node -v // v14.17.0
yarn -v // 3.2.0
```

Rocket.Chat runs on top of Meteor, which is based on Fibers implementation, Fibers only support s node 14.17.0 that's why you will not have success trying a different one.

You need to install Meteor and clone/download the Rocket.Chat's code by executing

```
git clone https://github.com/RocketChat/Rocket.Chat.git
```

Then you just need to run

```
yarn # installs the dependencies for all projects
yarn build
yarn dev # it will build the sub projects and then run the meteor project
```

The code is spread through the folders, `packages/` and `apps/meteor`, the latter contains the vast majority of the project's code.

If everything went well, it should build and run the application and database for you, which can be accessed on your browser from the url http://localhost:3000

You can check more info about mono repo and the tooling we are using here:

Build Your Own Meteor App with our Tutorials!

Meteor documentation

Documentation
Turborepo

Turbo repo documentation

Yarn
Yarn

Yarn workspaces documentation

Coding and Style Guide

Visite the Rocket.Chat developers docs for details on coding and the various style guides.

```
yarn lint
```

```
yarn testunit
```

```
yarn testunit-watch
```

It's important to run the lint and tests before pushing your code or submitting a Pull Request, otherwise, your contribution may fail quickly on the CI. Reviewers are forced to demand fixes and the review of your contribution will be further delayed.

Keep your PR's title as short and concise as possible, and use PR's description section, which you can find in the PR's template, to provide more details into the changelog.

Even if it's being something new in the code the users already expect the filter to filter by what they see (translations), a better one would be:

You can use several tags to describe your PR, i.e.: `[FIX]`, `[NEW]`, etc. You can use the descriptions below to better understand the meaning of each one, and decide which one you should use:

Example of- a **good** PR title:

Code Style Guide
Rocket.Chat Developer

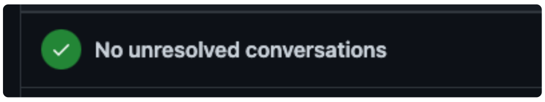
PR General Instructions and Handling

Purpose: This document contains some guidelines on how our engineers should interact with github Pull Requests so that we can enhance the review process.

Things you need to know first

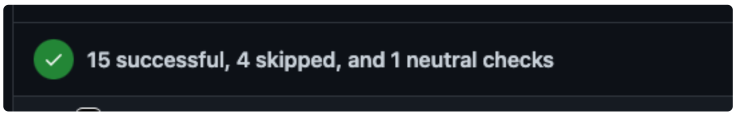
Pull requests in rocket.chat are automatically merged as soon as they meet certain requirements:

- At least one approver (and from all codeowners)
- No comments pending resolution



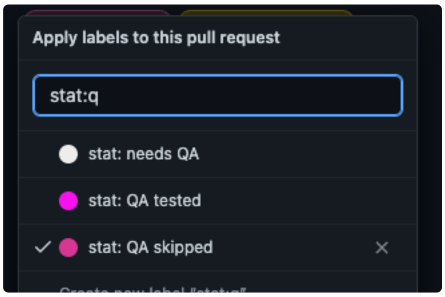
image

- All green ci tasks



image

- Label marked as 'stat: QA skipped' or 'stat: QA tested'



image

Rule 1: Start your work as draft

At rocket.chat we have several automations that notify teams when there is a new review pending.

If you open a pull request "read to review" the team will be notified. The team will look at your PR with CI issues, description issues, or even missing changes, they will then ignore it because it looks like an incomplete work and your PR lost its momentum, and went to a potential forgotten queue.

So the suggestion on how to deal is Create pull request in draft do everything you need to do Create tests for the proposed problem Ask a colleague, check if it looks minimally good Ask a colleague to test if the solution does what it needs Adjust the PR title Make sure the description is good Put all related issues in the description Ensure all CI tests and checks are passing

Then, only now, finally, you should move your pr from `Draft` to `Ready to review`

Rule 2: MILESTONES!

This is a rule that doesn't apply to community members. As soon as you start working on a task you know when it should be released. Whether it is a correction, an improvement or a chore. So to ensure that your precious work will be released at the right time, put the milestone. This helps when making the release, enabling the releasers to monitor PRS that are still pending.

Rule 3: The title matters

Here at rocket.chat we decided to make a changelog focused on the person who manages rocket.chat, not necessarily the developer.

So we created some rules (similar to conventional commits) to help organize the changelog generation

- `Regression: Your title here...` The term regression is used a little differently here on rocket.chat Regression means a bug introduced in the development period, which is being fixed before being released. No one has ever seen this problem in production, as it never existed in production. This is a regression. **This pull request and its description will be omitted from the release.**
- `Chore: Your title here` Things that don't matter to the customer/end user. Like: CI tweaks, rewrites that don't change behavior, Testing
- `[NEW] Your title here...` This one applies to new stuff, which will be released in the future, NEVER expect a new one to make it into previous releases
- `[IMPROVE] Your title here...` Similar to `NEW`, but it is about improvements in the features that already exist
- `[BREAK] Your title here...` This is not something you see every day, but it needs to be remembered. When we decide to change some functionality, or remove some functionality, it can affect the customer's life and he needs to know. Be careful, as this PR will be waiting for a MAJOR release, this may take some time.

Please make sure PR has a name that really translates the modification involved in it.

Rule 4: Description

All Pull Requests are expected to have appropriate description, mentioning the areas of the code, features, and expected behavior or other relevant details that help any person checking PR to understand its purpose on a highl evel, being this person from engineering, product community or other applicable interested parties.

Rule 5: Testing

It's very likely that when you make a change you also test the effects of that change, and that's great! However, it is a good practice that we create automated tests for those changes. So if you want to avoid extra work and review requests, create automated tests (e2e and unit).

Rule 6: Ownership

This is a rule may not apply to community members. You are responsible for your PR. Request changes? questions? conflicts? deadlines? and even reviews! you are responsible for managing all of those. Remember that in a company other developers are doing other task, no one else should be more concerned about this delivery other than you, so create a routine and keep your PRs always sharp. Another thing is deadlines, don't expect your pull request with 10000 files changes to be reviewed at the last minute, as soon as you mark it as done, ensure a comfortable deadline so that others can do their work correctly (QA+review).

PS: Other details on rule 9

Rule 7: Size

Pull requests should as much as possible be self-contained to make it easier for engineers to review them.

In case your pull requests contain modifications on multiple features or areas, please consider using “Feature Branch” approach. i.e. https://github.com/RocketChat/Rocket.Chat/pull/25570

Feature Branch will allow PR to have multiple checks and is expected to reduce bugs as well as keep items added as a bundle in what we consider an organized fashion.

Rule 8: Comments to Code

As we are an open source company with potential for every PR to be checked by community and have multiple engineers from different areas that can review your code it helps a lot to live comments on code to place lines of thought, as a calculation memory.

Rule 9: PR Review Actions

Review process and best practices are defined by chapters, with code owners as the gatekeepers for those to be followed.

Some important and general items to have in mind are:

1.Code Owners setup will be reinforced for any PR review.

2.In case a change is requested or comments from reviewer are made, conversation should only be marked as resolved by the reviewer who requested those changes. If another person marks conversations as resolved, this person will be accountable for any further developments from it.

3.In case a review is dismissed, the person dismissing the review will be accountable for any steps taken on PR afterward.

Review Guidelines

Review (PR related items)

- Milestone and Project are correct
- Related issues to be closed have the correct Milestone and Project
- Related issues to be closed are written correct (one per line)
- The title is correct and will be understood when read in the changelog
- Documentation is present, at the docs repository or in issue description (when applicable)
- The description is good and could be used in a blogpost (when applicable)
- There are images showing the changes from before and after, in English and in good resolution (when there are UI changes)

Review (Code related items)

- There are no irrelevant changes, they could make the review complex
- The data structure was change and there are migrations to convert the current data (CTO should be notified about structure changes)
- There are no performance issues, especially in migrations (when applicable, contact the performance team if you aren’t sure)
- There are no strings missing translations
- There are no translated strings without translation in `en.i18n.json`

Server Review

- The `package-lock.json` was not changed without changes in `package.json`
- The `package.json` has no irrelevant changes

Quality Assurance

Purpose

The purpose of this QA document is to highlight standard processes and controls to develop, implement, and manage Software Quality Assurance good practices. The goal is to enhance the effectiveness of the QA team, its processes, and to benefit the company's quality and workflows, to continuously improve its service offering.

To this end, the QA structure, this policy, and processes encapsulate the following principles:

- **Prevention is preferable to inspection:** one of our standards is to have a solid process that manages to embrace common issues, but the expected goal is to design a comprehensive workflow that can also prevent issues to happen.
- **The quality standard is zero errors, not “close enough”:** as a QA team, our main concern is to deliver a flawless testing cycle, addressing every single issue that we encounter.
- **Our definition of quality is to always meet the requirements:** the very backbone and core duty of the QA team is to ensure that every tested piece is strictly bonded to its requirement, so we can ensure that every outcome works as it was originally planned.
- **Change is the healthiest thing that can happen to a process,** however, it should happen as planned, not by accident.
- **Embrace automation processes:** automation is the future of QA. With the proper strategy, solid code and integration within other processes, automation tests and tools are always the best solutions to deliver a faster, cleaner and more traceable result.

Industry Standards

This document adheres to the values, processes, and standards defined by the ISTQB - International Software Testing Qualifications Board. ISTQB also maintains a Body of Knowledge which allows testers to be certified based on best practices.

More info here: https://www.istqb.org/

QA Team Roles and Responsibilities

A QA resource can assume multiple responsibilities within a given product test lifecycle. These assigned responsibilities vary across Rocket.Chat product landscape due to the scope and depth of activities required.

QA Engineer/Analyst

The Engineer/Analyst coordinates and executes test cases designed to validate and ensure expected quality

- Execute the test cases designed for each software release.
- Manage the outcome of the testing made, analyzing issues and keeping track of the bugs uploaded and the team members who are implied.
- Manage a historical test case library to run and end-to-end regression test.
- Identify and suggest opportunities to update and improve the current QA Regression - Implemented
- Work alongside developers and managers to ensure immediate bug detection.
- Design and execute test cases to ensure functionality and enhancements/bug fixes meet actual requirements.

QA Manager

Defines testing strategies, demonstrates leadership and coordinates communications across teams.

- Design, administer and monitor the validation plan or test cases for every suitable candidate in each software release.
- Define the extent of the quality process with other company team workflows to ensure a global quality endorsement.
- Provide consultant services and guidance on QA best practices to developers and management.
- Identify and suggest opportunities to update and improve the current QA regression.

QA Process

Software testing

Types of testing	**Description**
Smoke Testing	Consists of minimal attempts to operate the software, designed to determine whether there are any basic problems that will prevent it from working at all. Such tests can be used as a build verification tests.
Regression Testing	It is a type of software testing that ensures that changes (enhancements or defect fixes) to the software have not adversely affected it. The likelihood of any code change impacting functionalities that are not directly associated with the code is always there and it is essential that regression testing is conducted to make sure that fixing one thing has not broken another thing. During regression testing, new test cases are not created but previously created test cases are re-executed.
Performance Testing	It is generally executed to determine how a system or sub-system performs in terms of responsiveness and stability under a particular workload. It can also serve to investigate, measure, validate or verify other quality attributes of the system, such as scalability, reliability and resource usage.
Security Testing	It is conducted to evaluate the degree to which a test item, and associated data and information, are protected so that unauthorized persons or systems cannot use, read or modify them.
Acceptance Testing	It is pretty much like the smoke test, but it's usually performed as part of the hand-off process between any two phases of development.
Integration Testing	It is performed when testers ensure that business processes across workflows do provide precise as well as expected results.

QA integration

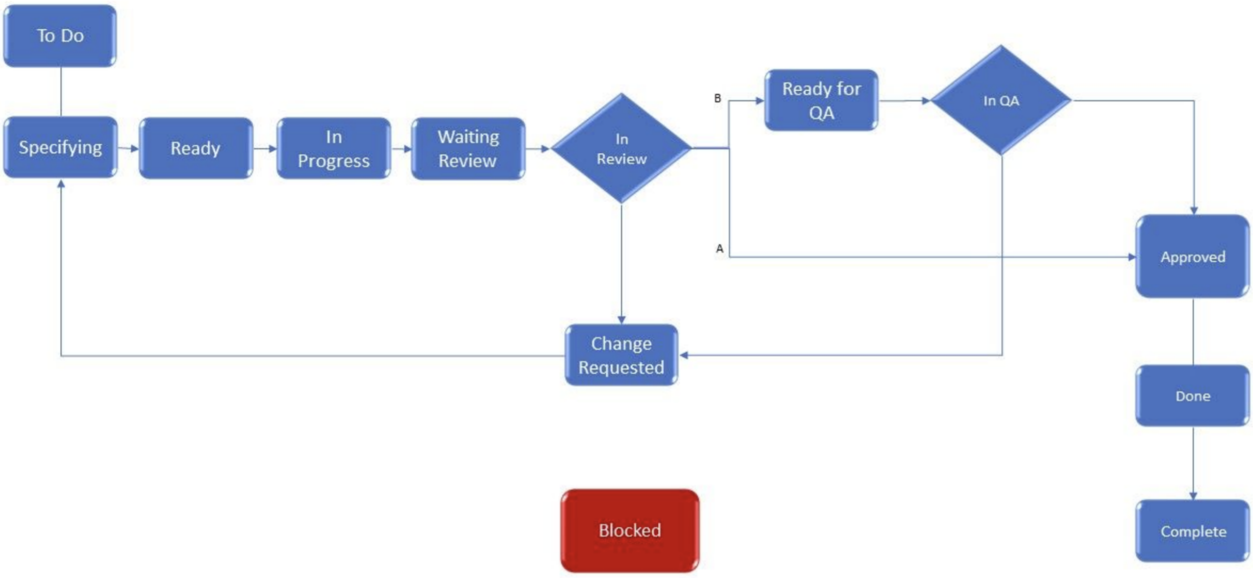
QA work and process is seamlessly integrated with development and design, adopting Scrum and Agile methodologies, with at least one QA analyst embedded in each squad that the company is divided on.

This is the updated list of squads that have a fully QA coverage:

- **Team Collab**
- **Omnichannel**
- **Mobile**
- **SAAS**

In each case the process is very similar, with QA entering very early in the development process, just after each PR is merged to master. Each QA team will manually test the task described in the ticket and also save the test case for a potential addition to the automated regression.

The ticket flow agreed to use in each team is as follows:



Once each team completes the tasks assigned to the sprint, there's a release candidate which get tested with a regression suite, fully automated and integrated with the CI.

QA monitoring

Tracking key metrics around the QA process helps identify where the company's time and budget are being used ineffectively and optimize accordingly. Equally important is measuring the efficacy of the testing process, for example, bugs that slip through to production are expensive to fix and can negatively impact customer confidence in our product. As a baseline, the quality metrics always need to be measurable, actionable, trackable over time, maintained and updated regularly, and tied to business goals.

With these parameters in mind, here are a few key numbers that our team plans to include in our QA metrics reports:

- **Test coverage:** the number and spread of tests across the codebase. This provides insight into where our resources are being used.
- **Escaped defects: t**he number of defects that reach production. This is one of the most direct measures of QA success.
- **Time to test:** the amount of time it takes to run and report results for a set of tests. This helps teams understand how to make testing cycles as efficient as possible.
- **Time to fix:** the amount of time between when some bug is reported and when it is fixed.
- **Schedule and calendar:** the difference between the planned testing schedule and the actual time given to test.

The ideal way to show these metrics reports is by month, to have a significant universe of issues, tests and bugs, and have enough time to act if something is going wrong at a process level. These reports will be sent via a QA-defined newsletter to all feature teams stakeholders by the QA manager.

If additional info is required, individual presentations could be arranged to discuss specific issues also with the QA manager.

QA scope

Our QA team is responsible for assuring quality of every single front-end and user-end feature within the processes of Rocket.chat and each sub-product or service related to the company.

QA Environments

I- Objective:

The purpose of this document is to share general information on QA environments available.

II- Our environments:

A- Individual pull request (PR) QA environment: Environment built on cloud for each PR analysis. We can create an environment for every feature we are working on, thereby giving us a more flexible, isolated development environment, and allowing us to test our code early in the development process.This environment is dismounted after test completion.

In order to create an individual PR QA environment, we need to run a command “qa-deploy PR number” in the qa-environment channel on server (open.rocket.chat). Once requested for a QA environment, confirm the PR and finally check status. A link to access the QA environment is displayed which can be accessed using any browser.

B- Unstable environment: Environment containing develop branch and used for general verifications. It is updated automatically every time a PR is merged into develop.

C- Candidate environment: Environment containing all PRs from release candidate that are expected to be deployed on monthly release. It is updated every time there is a new release candidate for the team to perform the various analyzes and tests.

D- Stable environment: Environment containing master branch with PRs from previous release and patch release. Only used if a special testing event is needed. Environment is updated every release.

PS: Please note all environments are expected to have Rocket.Chat Enterprise License enabled.

QA Bug/Regression Severity

Definitions on severity identified by QA.

CRITICAL - A defect capable of triggering a complete system shutdown, making it impossible to continue using the App. E.g.: Installation failing or a user not able to sign/log in.

MAJOR - A defect capable of collapsing a specific business-critical software functionality, but other parts are still functional, so the App is still usable. E.g.: The creation of new Rooms does not work.

MINOR - This issue causes confusion and undesirable behavior, but not enough to affect user experience significantly. Many UI bugs are “minor” issues. E.g.: Avatar sizes being different throughout the app.

TRIVIAL - An issue that does not affect functionality or isn’t noticeable. E.g.: Grammar or spelling mistakes, alignment errors, and problems with third-party apps.

Mobile Testing

To test a mobile build, the tester requires access to specific services and must know how to locate the relevant build. This applies to all teams.

This article aims to equip testers with the knowledge necessary to test any mobile build.

iOS

iOS

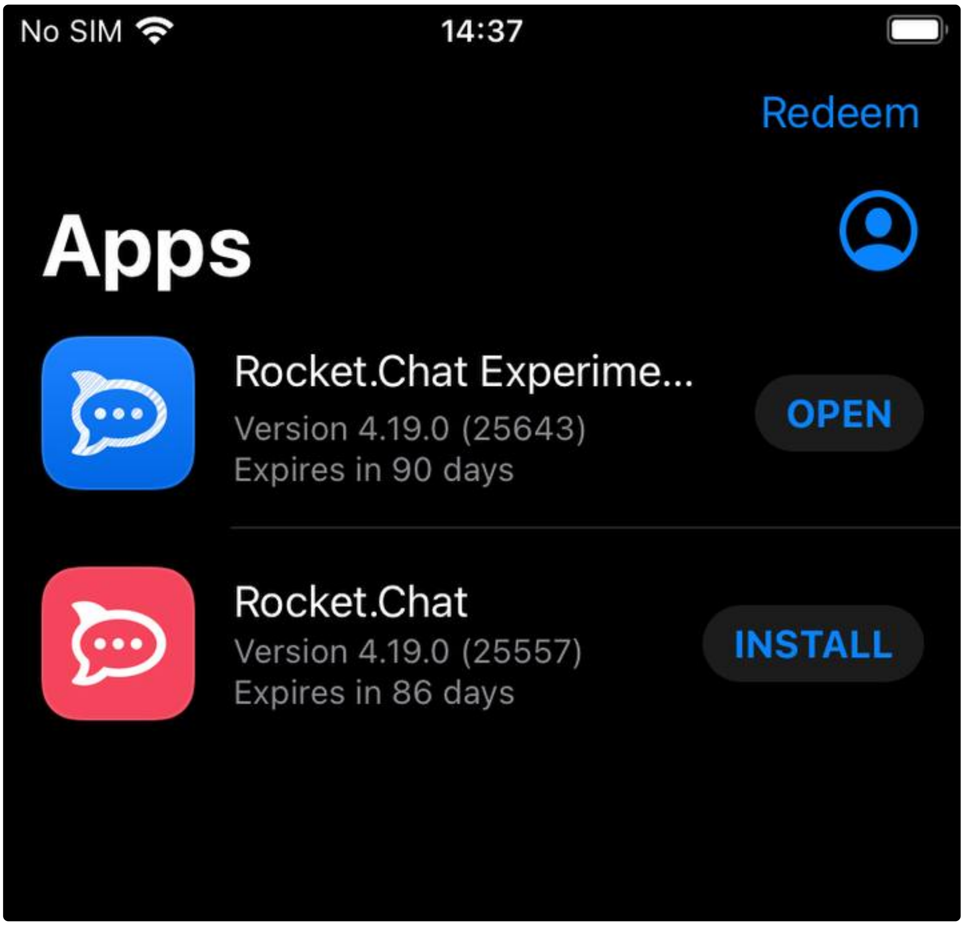
For iOS testing, the tester will need an Apple ID, as well as an invite to TestFlight, which can be downloaded directly from the App Store. Organize with a Mobile Developer to get the proper invitations.

> Make sure to create the Apple ID using your Rocket.Chat email account.

> You may also want to download the App Store Connect app to monitor the app's reviews on Apple, but that's not a requirement.

After downloading the apps, and being properly invited, you should be able to see the list of apps you have access to in your TestFlight app

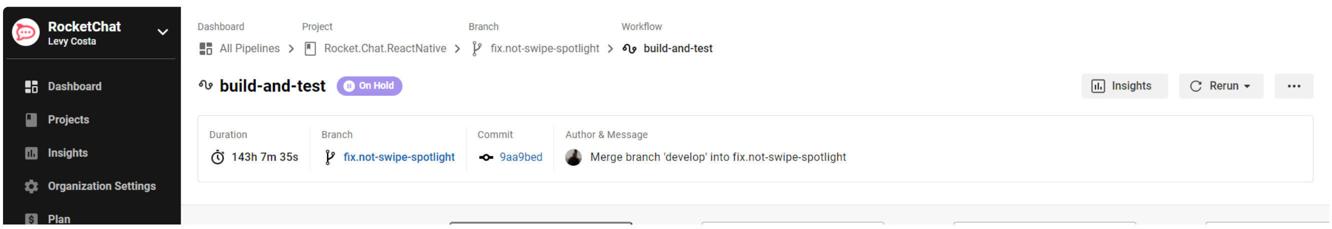
It should look similar to this:

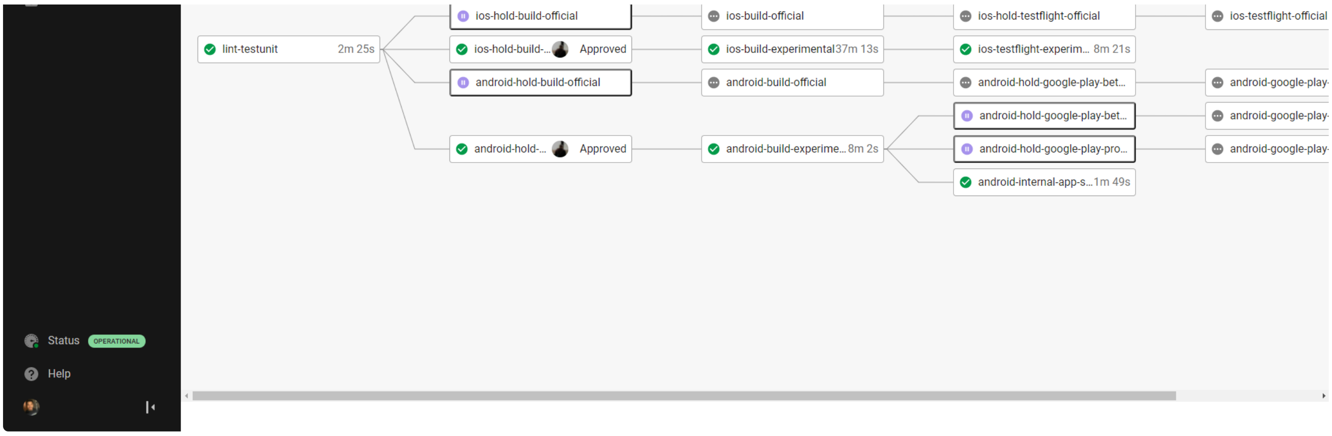


Normally, both the Experimental App and the Official App should be tested from here. To determine which version to test, refer to the CircleCI Workflow related to the task in question.

Confirming the tester has the right build

Below, there's a common CI workflow that has both iOS and Android Experimental builds ready for testing.

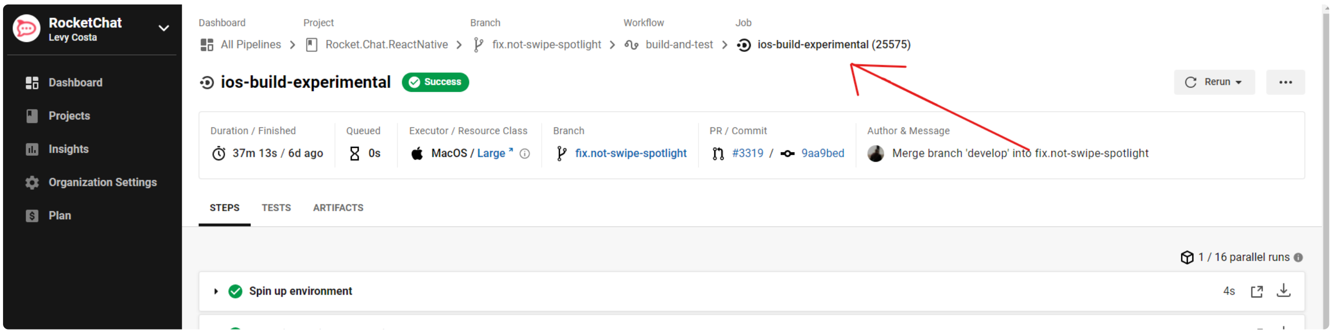




An example of a CircleCI Workflow

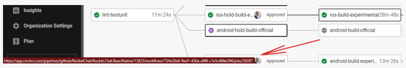
To find and confirm the iOS experimental build that the tester needs to install on their device, click on ***ios-build-experimental***.

On this new screen, you may see the number of the build on the breadcrumbs on the top of the page like so:

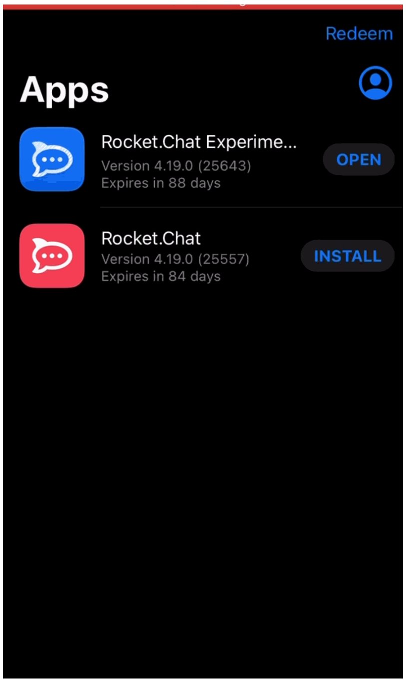


An arrow points to the number 25575

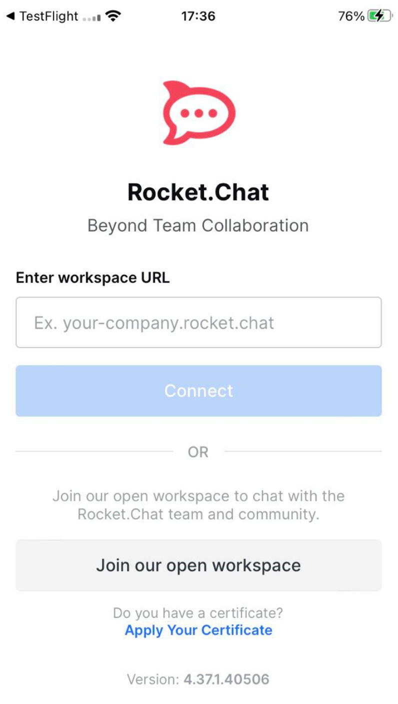
Pro Tip: You may see the number through the url preview that appears at the bottom of your browser while *hovering* the ***ios-build-experimental*** button.

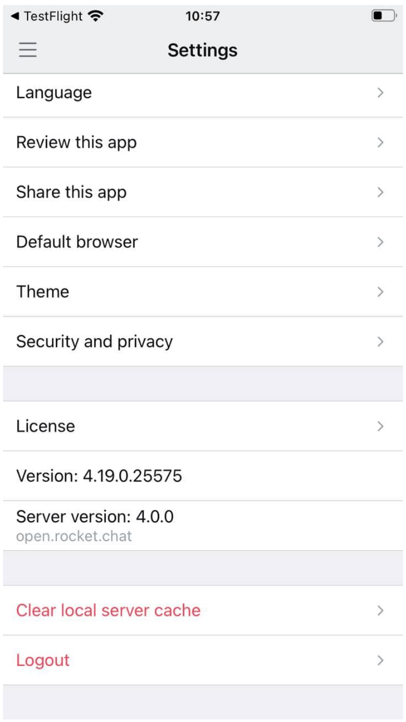


The tester may use this number to find the specific build on TestFlight by tapping on the app and going to *Previous Builds*, If necessary.



Once Installed, the tester may confirm the version number in a couple of places inside the app, before and after logging in.





Android

Android

For Android, testing is done through Google's Internal App Sharing.

The development team uploads the app bundle or APK through that service, and the tester downloads it using the specific link generated during the CircleCI workflow.

The tester must be added as an "Authorized Tester". Organize with a mobile developer to get the proper authorization.

> Remember to use your Rocket.Chat's email through the authorization process.

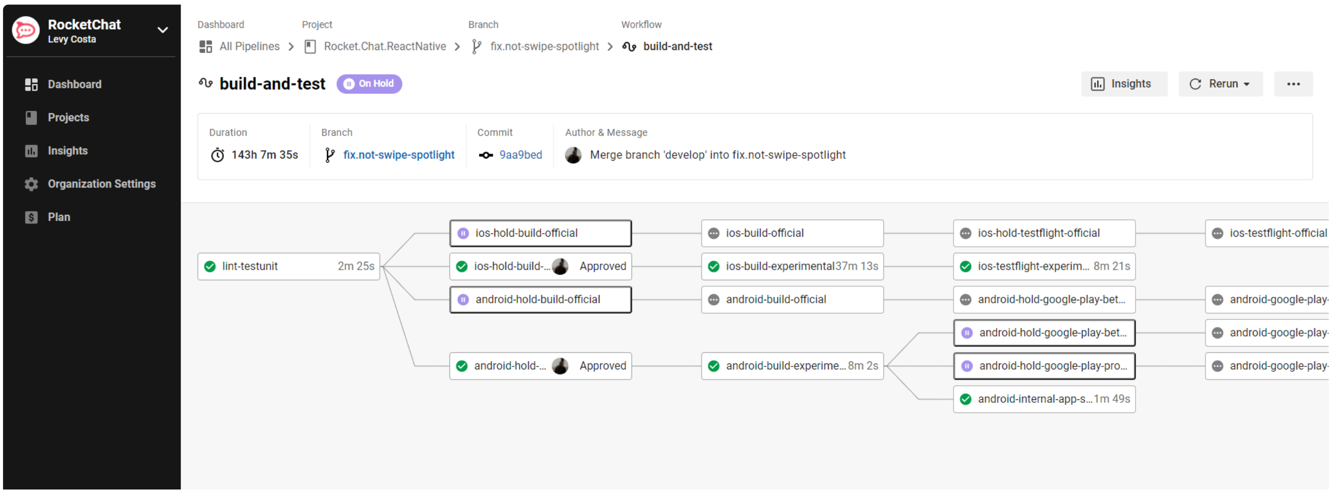
Once the tester is properly invited, they will be able to access the link provided by the DEV team to download the app bundle or APK.

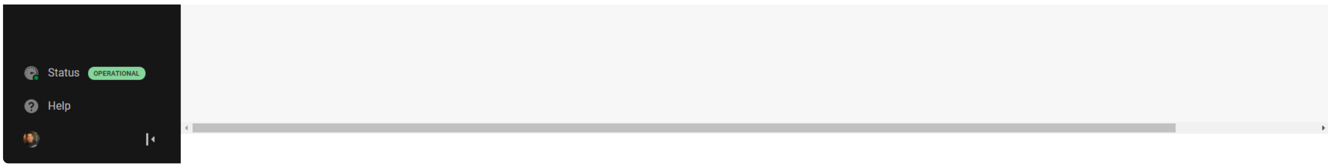
Without authorization, Google won't allow them to download the app even If they have the link.

Getting the link and downloading the app

The simplest way to obtain the link to the uploaded AAB to internal App Sharing is through the CircleCI workflow.

Below, there's a common CI workflow that has both iOS and Android Experimental builds ready for testing.

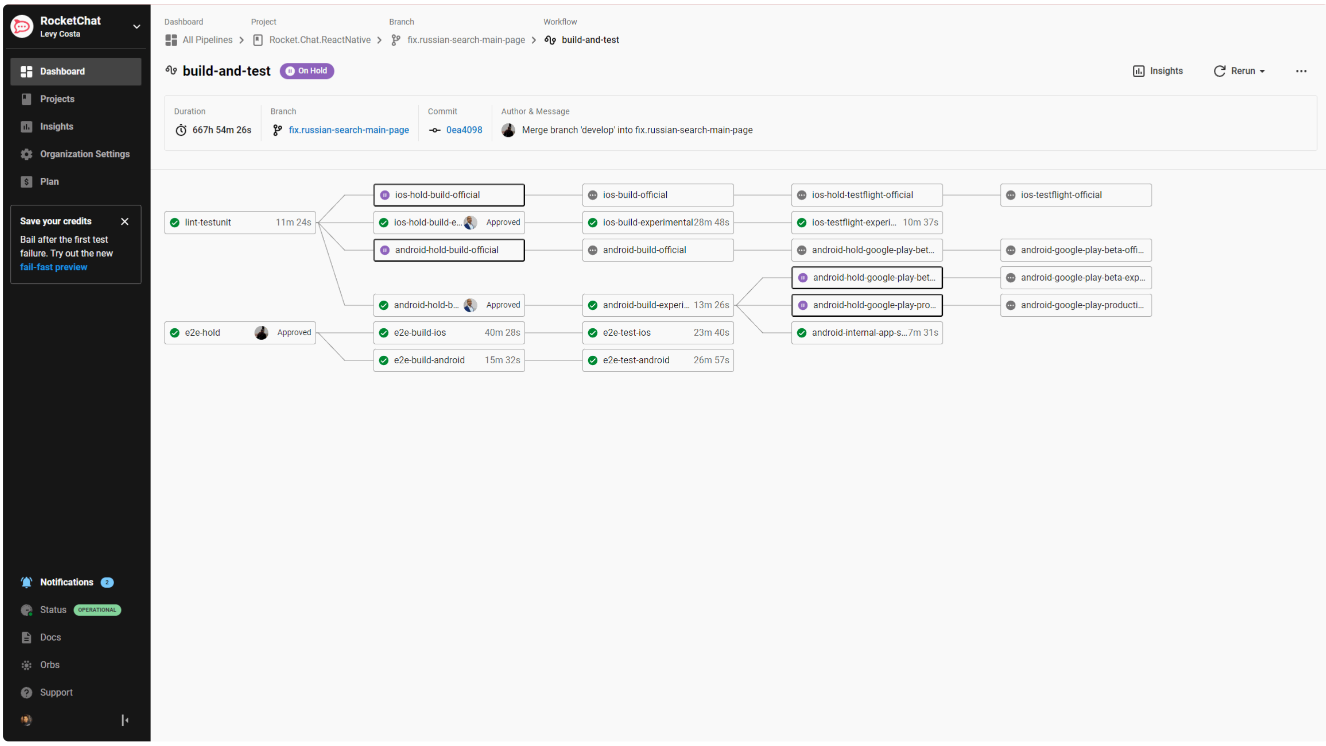




An example of a CircleCI Workflow

To find and confirm the Android experimental build that the tester needs to install on their device, click on ***android-internal-app-sharing-experimental.***

Once redirected, scroll down to the ***Fastlane Play Store Upload*** section and copy the link as shown below.

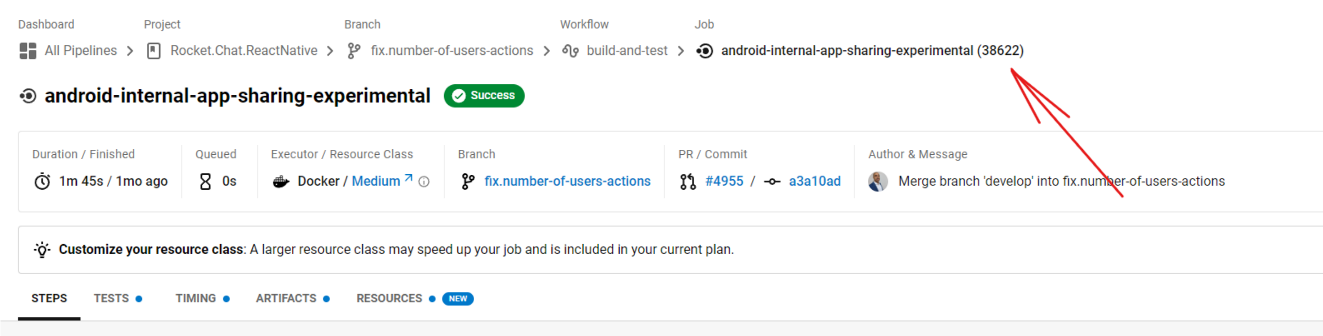


This link should be opened through the mobile device.

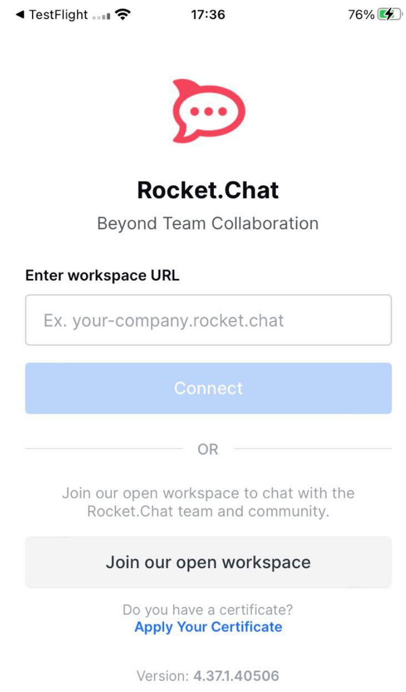
> ⓘ To make it easier and faster, a QR Code generator could be used. Like this one.

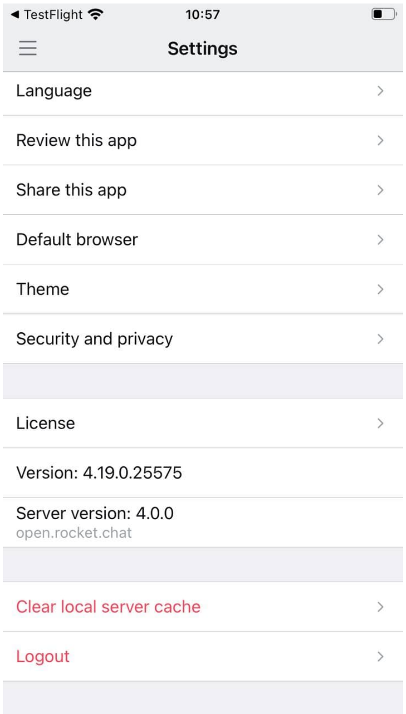
Confirming the tester has the right build

On the same CircleCI workflow, click on ***android-build-experiemental*** and check the number at the top of the page.



Once Installed, the tester may confirm the version number in a couple of places inside the app, before and after logging in.


TestFlight
17:36
76%
Rocket.Chat
Beyond Team Collaboration
Enter workspace URL
Ex. your-company.rocket.chat
Connect
OR
Join our open workspace to chat with the Rocket.Chat team and community.
Join our open workspace
Do you have a certificate?
Apply Your Certificate
Version: 4.37.1.40506


TestFlight
10:57
Settings
Language
Review this app
Share this app
Default browser
Theme
Security and privacy
License
Version: 4.19.0.25575
Server version: 4.0.0
open.rocket.chat
Clear local server cache
Logout

Technology

Endorsed testing tools

WIP

Engineering Hiring Process

We have many different processes that apply for different positions or grade levels. Some are more focused on interviews, others on code challenges, some take some days and involve different areas, others are one day only process. This page explains some of the most common types of hiring processes we apply today.

Whiteboard process

The whiteboard process consists of a 4 step interview, usually in a single day.

1. **First interview / Whiteboard:** 45min of a code challenge where the candidate shares his screen while solving the problem presented by the interviewer.
2. **First Interview / Design discussion**: Right after the code challenge, 15min discussing the decisions around the code produced. The candidate argues over his/her decisions about the solution delievered as well as general discussion about architecture.
3. **Second interview / Final:** 45min of a conversation between the candidate and some people from our team regarding the candidate's history, experiences, and questions related to his area of knowledge.
4. **Decision / Proposal:** Internal meeting among all of our interviewers and recruiters to share opinions about the candidates, decide the offers, and the best squads for the candidates. This step may happen in another day depending on the number of candidates.

Composition for the interviews

- **First interview / Whiteboard:** 2 engineers make part of the code challenge interview. The lead engineer has the same grade level for the position the candidate is participating and is responsible to make sure the candidate understands the process and guide him/her through the code challenge. The second engineer is usually someone who is a watcher to learn the process and be a leader in the future.
- **First Interview / Design discussion**: same audience from the whiteboard.
- **Second interview / Final:** Usually composed of 3 people, being one representative from tech area, one engineering manager and someone from recruiting team.

Interviewer preparation

The following items are general tips for you to get better prepared for the code challenge and the interviews.

First interview / Whiteboard - Before the code challenge

- English is not mandatory for this interview if all participants are fluent in another language.
- You will be asked to share your screen so make sure to close any application you don’t want us to see (like social networks or personal/work communication platforms).
- prepare your editor of choice (VSCode, Sublime, Vim, etc) and any plugin you may want to use (ESLint, Prettier, etc) since you won’t have much time to do this during the code challenge. We may also request you to code using a code sandbox or playground.
- Prepare a tool to test your APIs too (Postman, cURL, Insomnia, etc).
- We test your ability to design APIs, but not the ability to scaffold a project, so you can use a generator library (express-generator, fastify-generator, nestjs-generator, etc) and have that project prepared beforehand (no requirements on the name tho, you can be creative :)).
- You may or may not use a database, so have one ready to be used (MongoDB is preferred choice). This way, you won’t lose time by setting up one database from scratch.
- Ensure you have a good internet connection and you can secure a distraction-free space during the scheduled time.
- We allow you to use any search engine of your choice and any npm package you may need, apart from those explicitly banned during the code challenge's description. Again, you can use search engines, but don’t look for tutorials.
- We cannot see if you have a 2nd screen connected. This means we trust in you that you’ll follow the guidelines shared here.

First interview / Whiteboard - During the code challenge

- First, we may ask you some introductory questions about you (no tech related questions).
- Then, we'll share the test with you, you can take your time to read it, and ask as many questions as you want. Please, ensure you have the requirements clear before starting to code.
- When you start to code, you can ask questions too, you can share with us your thought process or talk about what you want to do or how you'll do it.
- Ensure to manage your time. The test is short enough to fit on 45 minutes or less, so be vigilant of the time you're using. We may give you some hints if we see you're stuck, but we always prefer you to come with the solution to the problems you're facing.
- We'll let you know when you have 5 minutes remaining and when time's over so you can wrap up/finish your code.
- You can test your application as many times as you want, please, ensure it works correctly.
- When there's around 1 or 2 minutes left, we'll ask you to do a quick run of the application you're developing to see everything works fine.

Note: We won't share feedback right after the code challenge. Talent Acquisition may reach you with some feedback and things we think you can improve.

First Interview / Design discussion (after the code challenge)

- After the code challenge, there will be around 15 minutes of conversation around the decisions you took to code the solution of the code challenge.
- We may ask you for some feedback about the test, this is optional, but you can be as honest as you want here. This won't have effect on your selection process in any way, but may improve the QoL of future applicants.
- The discussion may vary from simple code structure to more complex items such as design patterns.

Second interview / Final

- The interview may include technical questions along with a discussion of past work experiences, career aspirations and motivations.
- Be ready to discuss soft skills and growth opportunities.
- We want also to understand about your current position in regards of team structure, how demands reach you, how you provide status about your tasks and so on.
- This is also a great opportunity for you to make your questions and know more about the opportunity, our values and our team.

Do you have any feedback? Please, feel free to send suggestions to catarina.mattos at rocket.chat

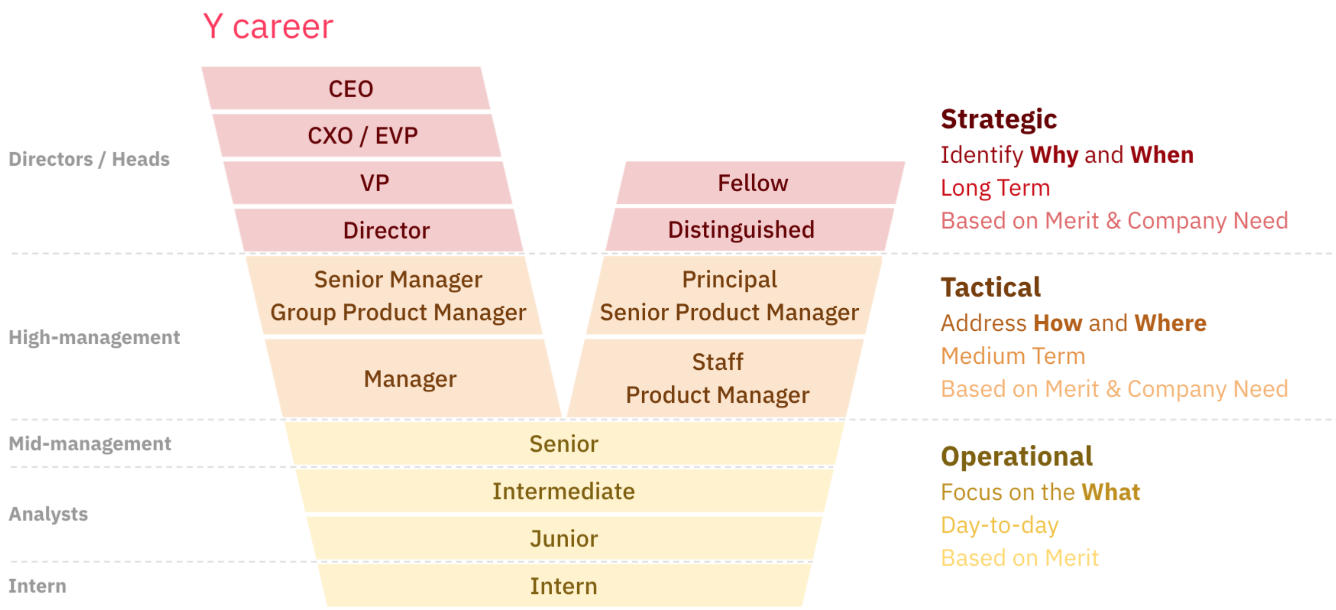
Engineering Career Path

Intro

The Rocket.Chat's career path considers the long-term relationship development with the team member. This trail goal permits the full development of the team members, weighing their expectations, skills, and company needs.

The paths consider technical and nontechnical aspects based on a “Y” career allowing the team member to tread their career path in a technical or the management trial reaching similar levels, regardless of the path chosen by the team member.

Levels



Strategic level

This level is in charge of **setting the company’s goals**, provide and approve the resources supply for the other company levels to reach the objectives.

Seniors professionals, as C-Level, Fellows, and Distinguished, form this level. They are part of the company’s executive meeting, and ideally, this level is in charge of a department of the company.

The strategic level has a specific budget typically and has a set of OKRs to be accountable for delivery.

Daywork

A strategic level member has to regularly **touch the bases with their managers**, represent the company in external meetings, meet the department in internal meetings, and discuss strategy with their pairs and their working teams.

The strategic level member also **knows the operations** very well and must keep in touch with the other organization’s members.

Outcome

The strategy must answer **WHY and WHEN** the company has to reach each goal. **The definitions of Vision, Mission, and Company values** are other important outcomes from the strategic level. This stage offers a long-term view of the company.

It is essential to say that all those concepts mentioned in the last paragraph must be clear, tangible, and intelligible for the other organization’s levels since the strategic level has more information and context than the tactical and operational teams.

Tactical level

The tactical level is in charge of **transforming the company goals into actions and initiatives**. Middle-level or senior professionals as Principal, Managers, and staff participates in committees and commissions and provide information for the other levels of the organization.

They usually do the **management of the resources of company departments**. The tactical level is in charge of being a bridge between the strategy and the operation.

Daywork

The tactical level members **oversee the operation daily**, **move the roadblocks**, and represent the department in meetings. Give guidance for the operational team and measure the efficiency of the ongoing activities. **Map, support, and give maintenance** for the actual business **process**.

Outcome

The tactical must answer **HOW and WHERE** the company will reach the goals. The roadmaps and the portfolio are other essential outcomes. The tactical level members are in charge of providing executive information for the strategic level and translating the strategy into actions for the operation. This stage offers a medium-term view of the company. This level must act as a coach, helping to identify how to held the best of each resource.

Operational Level

The operational level is in charge of **delivering value to the product, client, and user**. The Operational level Is the part of the company that puts the strategy and the tactics ongoing. Formed by Junior, Intermediate, and Senior professionals, the operational team members execute the actions and initiatives defined with the tactical level.

The operational team member can also create a new strategy or tactic initiative helping the organization on another level.

Daywork

The operational team member executes the process and **adds value to the products** and services supplied by the organization. In addition, the operational team is **involved in the planning, improvement, and implementation of the strategy and the company's tactics**.

Outcome

The operational team must answer **WHAT** company objectives were reached**.** As the closest client part of the company, the team helps provide feedback that will enable the organization to set new strategies and tactics. The members of this level have to provide operational support and information for the other levels of the organization. This stage offers a Day-to-day view of the company.

The Rocket.Chat Career Path

Rocket.Chat adopted a model where both technical and management careers can reach the same levels. According to the company beliefs, collaborators can be very skilled technical professionals and be well recognized in roles and salaries.

Adopting the "Y" career path model permits the team member to evolve in the first career steps with a common axis. Then, after deciding, based on the personal objectives and company needs, the development path will be followed.

Once someone reaches a Senior-level role and wants to progress, they will need to decide if they wish to remain purely technical or pursue managing technical teams. Their manager can provide opportunities to try tasks from both tracks if they want to. Staff-level roles and Manager roles are equivalent in terms of base compensation and prestige.

The common axis

Will be assigned Intern, Junior, Intermediate, and Senior levels to the entry positions according to their experience, skills, and characteristics. In this common axis, there's no separation between Technical and Management careers.

The Individual contributor axis

Technical excellence is something that Rocket.Chat values. Individual contributor career path allows the team member to keep their development without considering a change to a management approach and still with similar compensation.

The specific trail also clarifies the requirements for the team member assignment within a particular position.

Roles

In the individual contributor path, the team member can reach the following levels:

At tactical level

First stage

Staff or Product Manager: Considering the career will be directed for a product or technical trail.

The first step of the tactical level is acting as a consultant and an individual reference for the team.

Second stage

Principal or Senior Product Manager: Considering the career will be directed for a product or technical trail.

The second step of the tactical level is acting as a high consultant and a corporative reference for the team.

At strategic level

First stage

Distinguished: At this level, the person's contribution plays to their strength and role on the team. These contributions come in different forms: Provides technical direction to stakeholders (Product, Sales, others) and being the primary reference for the company on a specific topic influencing the company’s strategic decisions.

Second stage

Fellow: Advocate for improvements, being a principal reference for a specific product, service, or technology. Exert significant influence on the overall objectives and long-range goals. Solve technical problems of the highest scope and complexity for the entire organization.

The management axis

In the management path, the team member can reach the following levels:

At tactical level

First stage

Manager: At this level, the managers will seek to build out a great team, happy and prosperous; They will improve processes to make the team more effective. Plan and execute long-term strategies that benefit the team and the product stage**.** In charge of the people management, the manager must hold regular 1:1's with all team members helping the people evolve and grow up as a professional.

Second stage

Senior Manager or Group Product Manager: At this level, the person must extend the manager’s responsibilities; Manage multiple teams. Generate and implement process improvements, especially cross-team processes. Regarding people management, this individual must hold regular 1:1s with team managers and skip-level 1:1s with all team members. Establish a management mentorship.

At strategic level

First stage

Director: At this level, the person must extend the Senior Manager requirements and add excellent communication skills; Expert hiring manager skills. Be the manager of managers and keep solid agile project management skills. This position requires also to be in charge of budgeting and the second level OKR management, overseen the initiatives related.

Second stage

VP: At this level, the person must extend that of the Senior Director, Development responsibilities. It expands the role to cover full functional and product capabilities at Rocket.Chat. Drive recruiting of a world-class team at all levels. Help their directors, senior managers, managers, and individual contributors grow their skills and experience.

Third stage

C-Level: Be the principal management reference in the department. At this level, the person will be in charge of developing the organization strategy, defining the company’s main objectives, and representing the company for the board of investors. In addition, be a mentor to the company leadership.

The Reference

Considering the model proposed is replacing the old one, it is essential to mention the reference for keeping the consistency between the old and the new.

It Is important to reinforce that all the positions will receive a grade, and this grade will be the reference to link the old and the new chart.

The grades start at four and go until 16, and it doesn't depend if the team member is a Manager or an Individual Contributor. An individual contributor can have the same grade as the Manager and consequently the same salary input. It is also must consider that the compensation has others inputs like the region and fee charges.

Old to new levels

Management	Individual Contributor		Management	Individual Contributor
			CEO	
Director		=>	CXO / EVP	
			VP	Fellow
Manager	Specialist	=>	Director	Distinguished
			Senior Manager / Group Product Manager	Principal / Senior Product Manager
Lead	Distinguished	=>	**Manager**	Staff / Product Manager
	Senior	=>		Senior
	Intermediate	=>		Intermediate
	Junior	=>		Junior
	Intern	=>		Intern

Engineering People Management

On following pages you will find relevant information on general aspects for Engineering team people management

Lead Roles & Responsibilities

Here we may find some key aspects for leadership positions within Engineering and Product organizations.

Product Manager

- Define the product vision, strategy and roadmap
- Gather, manage, and prioritize market/customer requirements
- Drive the product and business-planning process across cross-functional teams
- Analyze consumer needs, market trends, and potential partnerships
- Assess current competitors offerings, seeking opportunities for differentiation
- Capture new product ideas from different departments
- Develop, implement and maintain roadmap timelines across multiple departments
- Translate product strategy into detailed requirements for prototype construction and final product development by engineering teams
- Provide continuous support to cross-functional teams by clearly prioritizing work to be done
- Confirm product is delivered in compliance with plans and definitions
- Collaborate closely with engineering, marketing and sales teams on the development, QA, and release of products to ensure success for the entire organization
- Work closely to design team to conduct product discovery
- Facilitate sprint plannings along with engineers
- Coordinate with product marketing press releases and product launch

Engineering Manager

Hiring (Squad Formation):

- Continuously assess and validate hiring plans based on engineering/squad needs
- Actively seek and hire talent following the hiring plan
- Conduct managerial interviews for candidates

People Management:

- Help engineers grow their tech and soft skills and experience
- Identify the need of Coaching and/or Mentoring to direct reports providing it or identifying the best person to do it
- Contribute to the sense of psychological safety on your team (OfficeVibe reviews)
- Hold regular 1:1's with all team members
- Facilitate conflict management
- Provide clear feedback around the individual's performance (including check-in and Individual Development Plans)
- Coordinate and plan team vacations and PTOs

Team Management:

- Work closely with product managers to understand and contribute to product strategy

- Work closely with product managers to understand and contribute to product strategy
- Ensure that team members understand the purpose, business drivers and impact of upcoming and WIP tasks
- Run an agile team as a servant leader supporting chosen framework
- Facilitate cross-squads communication & blockers removal
- Expedite decision-making on the team focusing on building the product the right way
- Support the team to transform product roadmap into well-defined and detailed plans for execution
- Guarantee adherence to established plans and manage expectations towards its conclusions
- Confirm completeness of requirements and acceptance criteria on engineering tasks as usability, performance and reliability
- Track team capacity and velocity, making sure sprint points are correctly attributed
- Be on top of team progress toward objectives (sprint, release, roadmap)
- Balance engineering initiatives vs products expectations
- Guide team to work towards company OKRsSeek and promote processes improvement
- Align among different squads Release Candidates and Final Release scope and dates
- Support daily, sprint review and sprint retrospective meetings
- Identify and communicate operational and delivery risks
- Work to maintain a backlog of technical debts and incentivize engineers to contribute and prioritize it
- Coordinate with Product Management and Design to ensure proper sequencing and loading of backlog and WIP engineering tasks
- Solicit technical design input and review from tech leads and architecture team members as needed
- Reporting on your team’s status, product quality and performance/operational excellence metrics

Technical Leader

- Conduct technical interviews to support hiring decisions
- Support to solve technical problems of the highest scope and complexity for your team
- Look for improvements to product quality, security, and performance
- Mentor Engineers on your team to help them grow in technical responsibilities and remove blockers to their autonomy
- Provide feedback around the individual's technical performance
- Collaborate with the team to share your knowledge and build a stronger squad
- Conduct cross-squads communication
- Lead decision making on the team focusing on building the product the right way
- Be a key person to transform product roadmap into detailed plans for technical execution
- Advocate and maintain the definition and improvement of our internal standards and best practices through code review and direct guidance
- Actively seek out impediments to our efficiency as a team ("technical debt"), propose and implement solutions that will enable the entire team to iterate faster
- Confidently develop large features and improvements with minimal guidance and support from other team members
- Feed management on how to balance engineering initiatives vs products expectations

Agilist

- Enables the transition to Agile by empowering teams to develop an Agile mindset

- Enables the transition to Agile by empowering teams to develop an Agile mindset
- Teach, coach and mentor teams and leadership.
- Set up governing processes to support agile-based approaches.
- Define the measurement system by way of identifying relevant metrics.
- Facilitate change in new ways of working
- Apply system thinking to expose bottlenecks
- Evaluate and advise on agile frameworks
- Seek and promote processes improvement
- Facilitate cross-squads communication
- Support Engineering and Product Management to keep alignment on plans and deliveries

Engineering Onboarding

Onboarding process specific for Engineering teams.

I - Objective:

Generate a common approach to onboarding new team members to squads.

II - Pre-Onboarding:

During the week prior to the new team member's first day, the Engineering Manager should:

1. Notify the squad on its main channel (onboarding date, name and job role)
2. Assign an engineer from the squad to become a Buddy for assistance and questions
3. Set a 30 min welcome meeting
4. Set a 1st-week check-in by end of the week

III - Onboarding - Roles & Responsibilities

Engineering Manager should:

1. Guarantee new team member attends Rocket.Chat onboarding 1-week process
2. Conduct welcome meeting with new rocketee and buddy to share general details about squad, engineer focal contacts, squad meetings to be attended, mention the different RC onboarding activities and share short term expectations
3. Introduce new team member to the squad and promote a quick self-introduction
4. Add new team member to all relevant squad channels and meetings
5. Provide access to the repos & other relevant links (private repos, private handbook, private documentation, etc)
6. Share below topics at 1st week check-in:
    - overview of the product and its roadmap
    - how do we make money with this product
    - who are our main stakeholders
    - walk through priority OKRs
    - current state of the product (big issues, responsibilities, etc)
7. Schedule recurrent 1:1 meetings with new team member
8. Set all onboarding related tasks on click up, assigning the new member and buddy
9. Grant 30 All Start Points to Buddy at end of onboarding

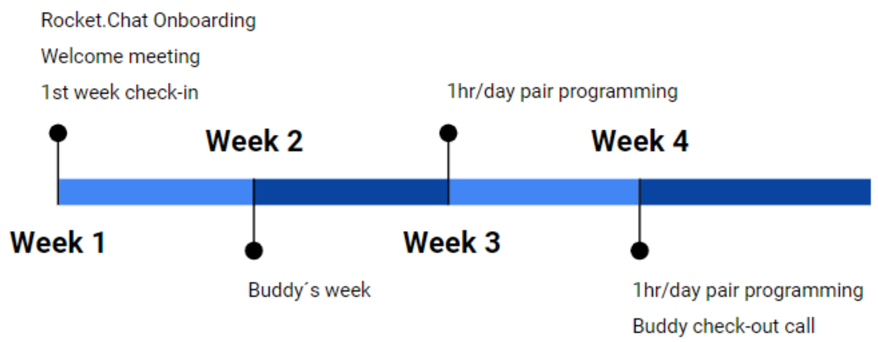
Buddy should:

1. Add new team member to the role-specific meetings and channels (triage, design, chapter, etc)
2. Share useful links: Clickup' sprints, backlogs, repos, roadmap, etc
3. Share codebase overview
   - Folder structure
   - Business logic
   - Current tech debt
   - Squad specifics documentation
   - How to approach your first build?
4. Share Development Process
   - How code is built, tested & deployed?
   - RC Release process
5. Coordinate a 2-week schedule of pair programming
   - Recommended 1 hour/day
   - Different team members to rotate
6. Run a buddy check-out call by end of new team member 1st month to validate knowledge transfer

New Team Member should:

1. Complete Rocket.Chat onboarding certification process in training.rocket.chat
2. Schedule 1:1s with main squad members (product manager, tech lead, chapter focal and others that might be applicable). Recommended agenda:
   - Get to know me
   - Understand the person role and main activities
   - Anything I can help with?

IV-Onboarding at a glance



Engineering Summer Student Onboarding

Onboarding process for Engineering Summer Students.

I - Objective:

Generate a common approach to onboarding new summer students to squads.

II - Pre-Onboarding:

During the week prior to the new summer student boarding Engineering Manager should:

1. notify the squad on its main channel (onboarding date, name and job role)
2. align on an engineer from the squad to become a Buddy for assistance and questions.
3. set a 30 min call with all new summer students joining squad on 1st day.

III - Onboarding - Roles & Responsibilities:

Engineering Manager should:

1. Guarantee new team member attends Rocket.Chat onboarding 1-week process
2. Conduct welcome meeting with new summer student and buddies to share general details about squad, engineer focal contacts, squad meetings to be attended, mention the different RC onboarding activities and share short term expectations
3. Introduce new summer student to the squad and promote a quick self-introduction
4. Add new summer student to all relevant squad channels and meetings
5. Provide access to the repos & other relevant links (private repos, private handbook, private documentation, etc)
6. Share below topics at 1st week check-in:
   a.overview of the product and its roadmap
   b.how do we make money with this product
   c.who are our main stakeholders
   d.walk through priority OKRs
   e.current state of the product (big issues, responsibilities, etc)
7. Schedule recurrent 1:1 meetings with new summer students
8. Set all onboarding related tasks on click up, assigning the new member and buddy
9. Grant 30 All Start Points to Buddy at end of onboarding

Buddy should:

1. Add new summer student to the role-specific meetings and channels (triage, design, chapter, etc)
2. Share useful links: Clickup' sprints, backlogs, repos, roadmap, etc
3. Share Codebase overview:
   a.Folder structure
   b.Business logic
   c.Current tech debt
   d.Squad specifics documentation
   e.How to approach your first build?
4. Share RC Development Process
   a.How code is built, tested & deployed
   b.RC Release process (<link to handbook release process)
5. Coordinate a 2 week schedule of pair programming with squad team members
   a.Recommended 1 hour/day
   b.Different team members to rotate
6. Run a buddy check-out call by end of new summer student 1st month to validate knowledge transfer

New Team Member should:

1. Complete Rocket.Chat onboarding certification process in training.rocket.chat
2. Schedule 1:1s with main squad members (product manager, tech lead, chapter focal and others that might be applicable). Recommended agenda:
   a.Get to know me
   b.Understand the person role and main activities
   c.Anything I can help with?
3. Attend Engineering Summer Talks, where every week there should be a new presentation and debate.
4. Attend tools and processes best practices calls

Engineering Manager Onboarding

Onboarding process for Engineering Managers.

I - Objective:

Generate a common approach to onboarding new engineering managers to the organization.

II - Pre-Onboarding:

1. During the week prior to the new engineer manager boarding a buddy E-Manager should be assigned by Sr Engineer Manager for assistance and questions.
2. Sr Engineer Manager should notify squad related to new engineer manager boarding on main squad channels (onboarding date, name and squads)
3. Sr Engineer Manager should set a 30 min call with the new engineer manager on day 1 to mention Buddy name & set initial expectations.

III - Onboarding - Roles & Responsibilities:

Sr Engineering Manager should:

1. Guarantee new engineering manager member attends Rocket.Chat onboarding 1-week process
2. Conduct a welcome meeting with the new engineering manager to share general details about job role, squad, engineer focal contacts, company meetings to be attended, mention the different RC onboarding activities and share short term expectations.
3. Introduce the new engineering manager to the buddy e-manager.
4. Add new engineering manager to all relevant squad channels and meetings - note this may vary from squad to squad.
5. Schedule recurrent 1:1 meetings with new engineer manager
6. Set all onboarding related tasks on click up, assigning the new engineer manager and buddy e-manager.
7. Grant 30 All Start Points to Buddy e-manager at end of onboarding

Buddy e-manager should:

1. Add the new engineer manager to the role-specific meetings and channels.
2. Share below topics at 1st week check-in:
   a.overview of the product and its roadmap
   b.how do we make money with this product
   c.who are our main stakeholders
   d.walk through priority OKRs
   e.current state of the product (big issues, responsibilities, etc)
3. Share useful links.
4. Discuss org structure, squad structure and people:
   a.Talk about 1:1 structure
   b.If applicable start a transition plan regarding the team(s) that will be transitioned to the new Engineer Manager
5. Share RC Development Process
   a.High level view on squad roles and sprint process
   b.RC Release process
6. Run a buddy check-out call by end of new engineer manager 1st month to validate knowledge transfer

New Engineer Manager should:

1. Complete Rocket.Chat onboarding certification process in training.rocket.chat
2. Schedule 1:1s with all squad members
3. Schedule 1:1 meeting with main stakeholders (VP of Product, CTO, product manager, tech lead, chapter focal and others that might be applicable). Recommended agenda:
   a.Get to know me
   b.Understand the person role and main activities
   c.Anything I can help with?
4. Attend Company, Engineering and Squad calls
5. Schedule KT and Ask Me Anything meetings with buddy e-manager

Addressing underperformance

Sometimes we might find someone in our team who is underperforming, in terms of results and/or behavior. Since we want our Rocketeers to succeed, we should give them every opportunity to work effectively, therefore it’s important to address signs of underperformance right away.

Below are some common signs of underperformance you should pay attention to:

- Lack of results;
- Misinterpretation of the goals;
- Response time;
- The unclear status of work;
- Frustration from other team members;
- Missed goals and timeline.

After diagnosing the problem, start acting!

Note that if you are not the manager of the Rocketeer, share your concerns with rocketeer direct manager with as much context and details you can provide.

If you are the manager of the Rocketeer:

1. Give clear and concrete feedback in your next 1:1. Explain the situation, what you have observed, and listen to the Rocketeer. Make sure you are clear on what you expect and be available to help, if needed.
2. If sometime later (2 - 3 weeks) you are still facing the same problem/behavior, we suggest you open an official PIP (Performance Improvement Plan). This will be a formal plan to try to solve the underperformance, a chance to get the Rocketeer back on track.

The main objective of the PIP is to support the Rocketeer with a tangible plan and transparent feedback as well as make clear statement that immediate action and improvements are needed.

Here’s how to open a PIP:

1. Let the People Business Partner know about it;
2. Start building the PIP (here is a template);
3. Share the PIP with the People Business Partner in order to exchange ideas and validate the plan (we can always do it together, if you prefer);
4. Present the PIP to the Rocketeer together with someone from the People Team;
5. Follow up the plan for the next few days. We recommend having a plan period between 30 - 90 days and you should have a touch point every week or every 15 days.

Important highlights:

- Be very clear on what improvements you expect, why this person is starting a PIP process, and set clear goals (with deadlines, how it will be measured, what is needed, etc).
- Don’t forget this is a plan for the individual, not yours. Be careful not to do the job for the person.

PIP is something personal and confidential between the manager, the Rocketeer, and the HR Team.

NOTICE: If the Rocketeer is doing/did something unethical or not aligned to our DOTS you shouldn’t open a PIP. The right decision is to let this person go.

Career Planning with Engineers

General process to aid career planning sessions with Engineers

Objective:

The purpose of this document is to share general approach into software engineers career plan as a way off adding transparency and common ground for engineers and managers.

Our approach:

Career plan is split into 4 different phases:

A-Reflect: Thinking about what you really want and the environment.

B-Research: Study and get data that assists on getting where you want.

C-Plan: Planning the actual steps to get there.

D-Act: Working on make your career aspirations come to life.

The engineer is responsible for all these phases and activities related to those.

The manager should act a facilitator providing guidance on steps, context on Rockect.Chat and giving relevant feedback.
It is expected that the manager will set 2 meetings and drive the conversation on steps mentioned below.

1st meeting steps:

1-Manager should set 1 hour duration meeting as career plan part 1 and place following items on agenda:

“Notice career plan is split in 4 phases: Reflect, Research, Plan, Act.

A-How do you define success?

B-What is your main career goal?

C-What are the problems you solve today?

D-Work on a personal SWOT Matrix

E-Next Steps”

2-During the meeting start by sharing message: “Notice career plan is split in 4 phases: Reflect, Research, Plan, Act. Today we are covering some points of reflection that will be the key for any future steps.”

3-Manager should go over questions A and B and make sure to use active listening.
Do NOT assume anything! Make sure you get a clear understanding of where the person wants to go & why + have their own words about goals and aspirations.

4-Go over question C and see if it’s aligned in any way to persons goal or at a very high level, how it might be connected. PS: Might be a good time to get alignment on value being brought by the person.

5-Now it’s time to work on Personal SWOT Matrix. Recommend starting with internal factors (Strengths and Weakness) and later move to external factors (Opportunities and Threats).

PS: Don't worry if matrix is not fully complete by the end of the meeting. Person should complete and have it available for next meeting.

6-End the meeting here and let time to reflect.
Manager should share RC career guidelines and relevant resources that can help the engineer prior to next meeting (i.e. articles, books, people to talk with, handbook pages, etc). Engineer should search for skills and further details on career objectives as well as complete the SWOT matrix.

2nd meeting steps:

7- Manager should set up a new 1-hour meeting with engineer and place on agenda:

"Notice career plan is split in 4 phases: Reflect, Research, Plan, Act.

F-Review Objective and SWOT

G-Skills and gaps

H-How will we follow up"

8-Make sure to revisit engineer objective and personal SWOT details to be aligned on career aspirations.

9-List all relevant skills on a spreadsheet and get a column with current level and another with expected level career goal for engineer that you will be working. Have honest open discussion here.

10-Prioritize up to 3 skills that engineer will be focusing during the next evaluation period and together with engineer build actions to cover them.
PS: Manager should help sharing context on RC product roadmap, projects, people, and other resources that can aid on engineer objectives.

11-Get agreement on how progress will be monitored and how items will be documented on RC-IDP (Individual Development Plan)

12-Manager should also reserve some time for any additional questions from engineer and if nothing else meeting can be closed here.

Community

The Rocket.Chat Community Team

A large global open source community, vibrant and engaged, is at the very heart of Rocket.Chat's product-led-growth business strategy. It is the mission of the Community Team to nurture, build, engage and grow this community.

The Community Team is the result of an earnest investment made by Rocket.Chat back into the foundational community that contributed to its success.

Leveraging and learning from the community building work done during the formative years of Rocket.Chat and mixing in modern massive on-line community creation / management ideas and techniques, the team aims to fulfill two major objectives in 2021 and 2022:

- build a growing internal community that embraces and loves our growing external community
- embrace and engage our existing team-collaboration community; build and grow massive on-line communities around new innovation pillars including omnichannel, apps/marketplace, (matrix) federation and other opportunities

We are reaching these goals together with our rapid internal company growth, hand in hand with our community.

Working with communities at-scale, our approach is to embrace the necessity to be data-driven. All our strategic initiatives will have measurable succinct success indicators.

The team structure and cross-disciplinary focus is designed to scale with the growth of both our internal and external communities and their needs while respecting the level of investment in Community.

Currently the team is structured into the following disciplines:

- Community Management
- Developer Evangelism
- Training and Certification
- Deployment and DevOps

Learn about the team that is making this happen:

Team

Learn about each of the disciplines in the Community Team:

Community Management

Developer Evangelism

Training and Certification

Deployment and DevOps

Team

Team Members:

- Head of Community: Muni Narayan (acting)
- Community Manager: Duda Nogueira
- Developer Evangelism Manager:
- Training and Certification : Muni Narayan
- Deployment and DevOps Specialist (SuperTech Rocketeer): Debdut Chakraborty
- Summer Intern: Lucas Machado

Onboarding overview

Rocketeer Certification

A Community + People team production for our beloved internal community

Your 30-60-90 days plan

Planning your own first 30, 60, and 90 days as a Community Team member

At 30 days

At 60 days

At 90 days

Community Management

In Rocket.Chat, the area of Community Management encompasses the management and sustaining of direct touch-points with the existing communit including but not limited to:

- forums.rocket.chat
- Github repositories
- open.rocket.chat (Open community Rocket.Chat server that we have been operating 24 x 7 since inception)
- email alias : community@rocket.chat
- other open source communities (such as Cloudron community, DigitalOcean community, ubuntu snap community, and others)
- other two way social network or forums (such as Twitter, Reddit, Stack Overflow, HackerNews, and others)

Members of the Community Management team assist, listen and respond to the community at these concrete touch-points directly on a daily basis. A Community Management team members need to have a nominal Rocket.Chat specific technical competency, to be confidently interacting with our cu community of administrators and users of Rocket.Chat. Community Management team members are supported directly, as they engage the communi answering their need and questions by:

- product team (product managers of various verticals)
- marketing team (for public relations, demand generation, and content generation/management)
- engineering management (to improve quality of product by expediting bug fixes and expedite resolution/merge of Pull Requests)
- engineering technology team (for matters beyond the technical capabilities of the Community Management Team members)

Throughout the second half of 2021 (initial formation of the Community Management Team), several processes in handling the above have been defi are being refined by the Community Management Team and the cross-disciplinary teams listed above.

These living, evolving, processes are documented below:

Github Repositories

https://github.com/RocketChat/handbook/blob/2.0/departments-operations/community/community-management/forums.rocket.chat-discours

open.rocket.chat

Github Repositories

With our current team-chat centric community, our 100+ Github repositories are the primary touch-points.

The Community Management team has established the following processes in handling these repositories.

- Resolution of Github Pull Requests
- Feature requests for Product Roadmap Inclusion
- Expedite bug fixes to improve product quality and reliability

Resolution of Github Pull Requests

Github Pull Requests are code contributions made by our code contributors (both internal staff and community members). The objective of this process is to expedite the resolution of Github PRs created by our community of contributors.

Most healthy open source project maintains a queue of PRs waiting to be reviewed and merged. Maintaining this queue at a reasonable length and avoiding heavy backlog from lead community contributors is the main goal of this process.

The core of this process is asynchronous communication for faster resolutions.

1. Track The PR

Tracking progress of any task is necessary to build a healthy repeatable process.

To achieve that, with each new pull request, the community team member should always follow the below steps -

1. Add him/herself as a reviewer on GitHub.
2. Add the PR to this clickup list.
3. Assign the task to him/herself on ClickUp.
4. Add a due date of one week to avoid heavy backlogs in the future.

2. Overlap Detection

Ideally a contributor should communicate and share what they want to work on prior to submitting a PR on our open community server's dev channel. That way we can drive them to the right direction and avoid any potential overlap.

But with such a huge community like ours, overlapping PRs are a big possibility. To resolve the situation, it is critical to understand, with which stage of the internal development pipeline, the community PR is clashing.

Here is a general development pipeline to follow -

```
Planning -> In Progress -> Completed
```

The `Planning` stage is when the Product Manager or Engineering Manager decides on which features to implement, which bugs to prioritize the current quarter.

Once decided and prioritized, some engineer is assigned to the task. This is the `In Progress` stage, when a developer has been tasked to tackle the job.

Finally when the staff engineer opens a PR, the process is considered to have reached the `Completed` stage. The road to getting that PR merged can be long but for outside contributors, it is considered to be complete.

Overlap Resolution

We value all our contributions, but if an overlap comes to be, generally the staff PRs get precedence over community contributions. Following is a step by step process of what to do at which stage.

- **Planning stage** *The community PR is put on hold*. The community team member then contacts the Product Manager or the Engineering Manager for feature implementations and bug fixes respectively as soon as possible to avoid it reaching any of the next two stages. *Whether the PR will be accepted or not stays inconclusive in the meantime.*
- **Ongoing stage** *The community PR is put on hold indefinitely.* It is now upto the community team member to talk to the Engineering Manager or the respective Product Manager for bugs and feature implementations respectively and come up with a resolution. *It'd be safe to assume that the outside contribution will not be accepted.*
- **Completed stage** *The community contribution is to be politely rejected.*

3. Review I

The assigned community team member now determines if the PR is immediately resolvable or not. There are two questions to be asked here -

Is it a feature implementation?

If it is a feature implementation, does it conform to our product roadmap? *If not, the PR should be politely rejected.*

If it conforms to our product roadmap, is the implemented feature planned to be EE only? *If so, the PR should be politely rejected.*

If the previous two checks are passed - is there any visible overlap? Go to the previous section for an overlap resolution if there is. Otherwise,

1. Assign the task to the respective Product Manager on ClickUp.
2. Set the appropriate squad.
3. Assign to the respective squal lead.

Is the feature planned to be implemented in the current release? If so,

- Extend the due date by two weeks.

If it is to be implemented some time in the future,

- Extend the due date to sync with the planned timeline.

Is it a bug fix?

If it is a bug fix, the community team member attempts to review the PR. If possible, he/she approves the PR for public visibility. Furthermore, he/she must also -

1. Assign the task to the Engineering Manager on ClickUp.
2. Set the appropriate squad.
3. Assign to the respective squad lead on both ClickUp and GitHub.
4. Extend the due date by two weeks.

4. Review II

If the PR gets to this stage, one of the developers from the respective squad reviews the PR one more time for quality check and any other issues. This review process can take a couple of days to weeks.

5. Final Resolution

Once upto satisfaction and if everything checks out, **the PR gets merged**.

Feature requests for Product Roadmap Inclusion

Our Community has been, and always will be early adopters of our product and its innovative features. As such, feature requests originating from community deserves careful handling and consideration.

This process aims to collect, triage and manage the incoming feature requests from community members and where necessary, champion its conclusion with Product Management team to have them included into the product roadmap(s0.

1. Community Team member collect community feature requests from the community, typically at one of these key touch-points: * from Community Advocate meetings * Github issue * Github Feature Request repository * from key community members on open.rocket.chat
2. Community Team member will either: * encourage and ensure community member creation of Feature Request in the Feature Request repository * create the feature requests her/himself
3.

Expedite bug fixes to improve product quality and reliability

forums.rocket.chat - Discourse forum

Our forums, located at at forums.rocket.chat is a touch-point where Rocket.Chat community often visits. It is running on the SaaS platform of the popular open source Discourse forum project.

For Rocket.Chat, it is a publication platform for long lasting important announcements. For some community members, it is a more traditional and comfortable environment to engage with Rocket.Chat and/or other members of the community.

The Community Team members handle queries on these forums with their individual style and finesse, as the incoming nature of these forum post is often unpredictable and rather eclectic.

All Community Team members are required to show the following in their exchange with community members on the forums:

* show sincere empathy for the community member
* behave in a respectful manner in all interactions and replies
* do not engage in or support "flame" even if it is directly started / incited by a community member
* be consistent with the current company direction in all public statements
* seek next level or extended team intervention when in doubt

For certain important planned technical announcement where community reaction is expected to be intense and where more precise team alignment is required when responding -- a process has been defined and being evolved:

Responding to forum post (Major technical/change annoucements)

Responding to forum post (Major technical/change annoucements)

In some cases, when a major technical or change announcement is made, intense community participation and/or reaction is pre-anticipated. To handle these situations in a productive and consistent manner, the Community Management Team has established (and is evolving) the following process.

These announcements usually comprise of:

- an official announcement on forums.rocket.chat by CEO / CTO (or other executives)
- a detailed technical document, linked to via the announcement, that explore in total technical details the actual change or elements of the announcement
- an Frequently Answered Question document capturing the official answer to the most anticipated and most asked questions

These announcements also usually involve:

- product management team representing the need for change, or the rationale for the implementation
- product engineering team and members for the detailed technical interactions that are often required
- public relations team member to ensure responses are consistent with the voice of the company
- documentation team member to revise the technical document "Live", as well as tweaking the FAQ as more responses are created
- community team member to handle the actual response and to make sure community comments are adequately addressed and technical matter adequately resolved

Responding to forum posts - an evolving process

1. Transcribe : Community team member transcribe the forum post content onto the worksheet (or Clickup) to start the workflow
2. Draft Answer - Depending on the nature of the query, different team members should draft the initial answer: * in-depth technical answer will require product engineering team member * product feature related answers will require product management team member * other queries are most likely answerable by community team member directly
3. One voice alignment - member of public relations team will review the draft answer and rewrite / modify to enforce the company one-voice alignment. This step can be done asynchronously depending on the situation. The one voice alignment may require an update of the response in an asynchronous case.
4. Final message tweak - the member answered in 2 can have a final message tweak based on the adjustment in 3.
5. Final approval - this approval before posting should be performed by a product team member.
6. Posting - this is done by a community team member.
7. FAQ edition - documentation team member will review the post to determine if a question should be added to the FAQ

A member of the Community Management Team should own, co-ordinate and run the process during the response period of the announcement.

Developer Evangelism

Training and Certification

Engage and grow the community by supplying them with the knowledge they need to succeed with the Rocket.Chat ecosystem.

Deployment and DevOps

Grow the number of globally deployed servers by making Rocket.Chat installable on the widest possible variety of systems everywhere.

$ Finance

Purpose

The team aims to guarantee the Financial Health of the company, through the maintenance of the financial books and compliance with local accounting rules. As for planning and budget, we want to ensure each department owner is accountable for their own expenditures and able to make decisions based on the Finance's team analysis.

Main OKRs level 1 related:

- CP-O1: Quickly grow and mature Rocket.Chat to achieve scale

Members and functions:

- Suely Morales: VP of Finance
- Débora Coy: FP&A Lead
- Patricia Ferreira: Administrative Manager
- Gustavo Fogia: Junior Financial Specialist
- Karen Demeterco: Senior Financial Specialist

Cost Center Structure

What is a Cost Center?

A cost center is a structure that represents a department in a company to which costs can be allocated.

The cost center's main function is to track all expenses linked to a particular function or department, which supports our Profit & Loss/ Financial Results structure, as well as budget department owners controls.

Cost Center Structure

Whenever your team uses part of their budget to **purchase **something, the expenses **will be allocated to your specific department's cost center**, as well as salaries and contractors costs.

Below, is our Cost Center structure.

Category 1	Category 2	Category 3
1. COGS	11. Customer Services	111. Customer Services
1. COGS	12. Professional Services	112. Professional Services
2. G&A	21. Management	211. Management
2. G&A	22. Operations	221. Operations
2. G&A	23. Finance	231. Finance
2. G&A	24. People	241. People
3. R&D	32. Product	321. Product
3. R&D	33. Engineering	331. Engineering
3. R&D	33. Engineering	332. Security
4. S&M	41. Enterprise Solutions	410. Enterprise Solutions General
4. S&M	41. Enterprise Solutions	411. Customer Success
4. S&M	41. Enterprise Solutions	412. Pre-Sales
4. S&M	42. Marketing	421. Marketing
4. S&M	42. Marketing	422. Community
4. S&M	43. Sales	430. Sales General
4. S&M	43. Sales	431. Acquisition
4. S&M	43. Sales	432. Expansion
4. S&M	43. Sales	433. Lead Generation
4. S&M	43. Sales	434. Partnership
4. S&M	43. Sales	435. Sales Effectiveness
4. S&M	43. Sales	436. Sales Enablement

Accounts Payable Policy

What you will see in this section

Accounts Payable Team contacts:

- Kaique Silva
- Patricia Ferreira

Who does this policy apply to?

This policy applies to:

- **Employees (in Brazil and US) who make purchases for the company**
  - Every collaborator who buys any type of service or product for the company in the course of its business activities.
  - Example: The Marketing Team needs to hire an external consulting to collect data from the Market. The moment they are going to hire the service, it is necessary to agree the payment term and the due date with the supplier.
- **Contractors (all countries outside Brazil)**
  - Our RC international collaborators who invoice the company monthly for their services.
- **Brazilian Individual Entities or Independent Contractors**
  - Our Brazilian collaborators who invoice the company monthly for their services.

What is the Objective and Why are we implementing this policy?

Objective

This policy establishes new protocols to manage how the company procures or purchases goods/services on behalf of the company. It covers invoicing and documentation for these purchases and how/when Rocket.Chat issues associated payments.

The policy affects many of Rocket.Chat collaborators, so please read the policy carefully and do not hesitate in contact Accounts Payable Team in case of any doubt. It also has implications for suppliers based on our new payment protocols, thus it is extremely important the proper communication from our collaborators with them.

Why

Due to the company's growth and increased hiring, it became very relevant the need of standardizing the accounts payable and payroll schedule process for contractors.

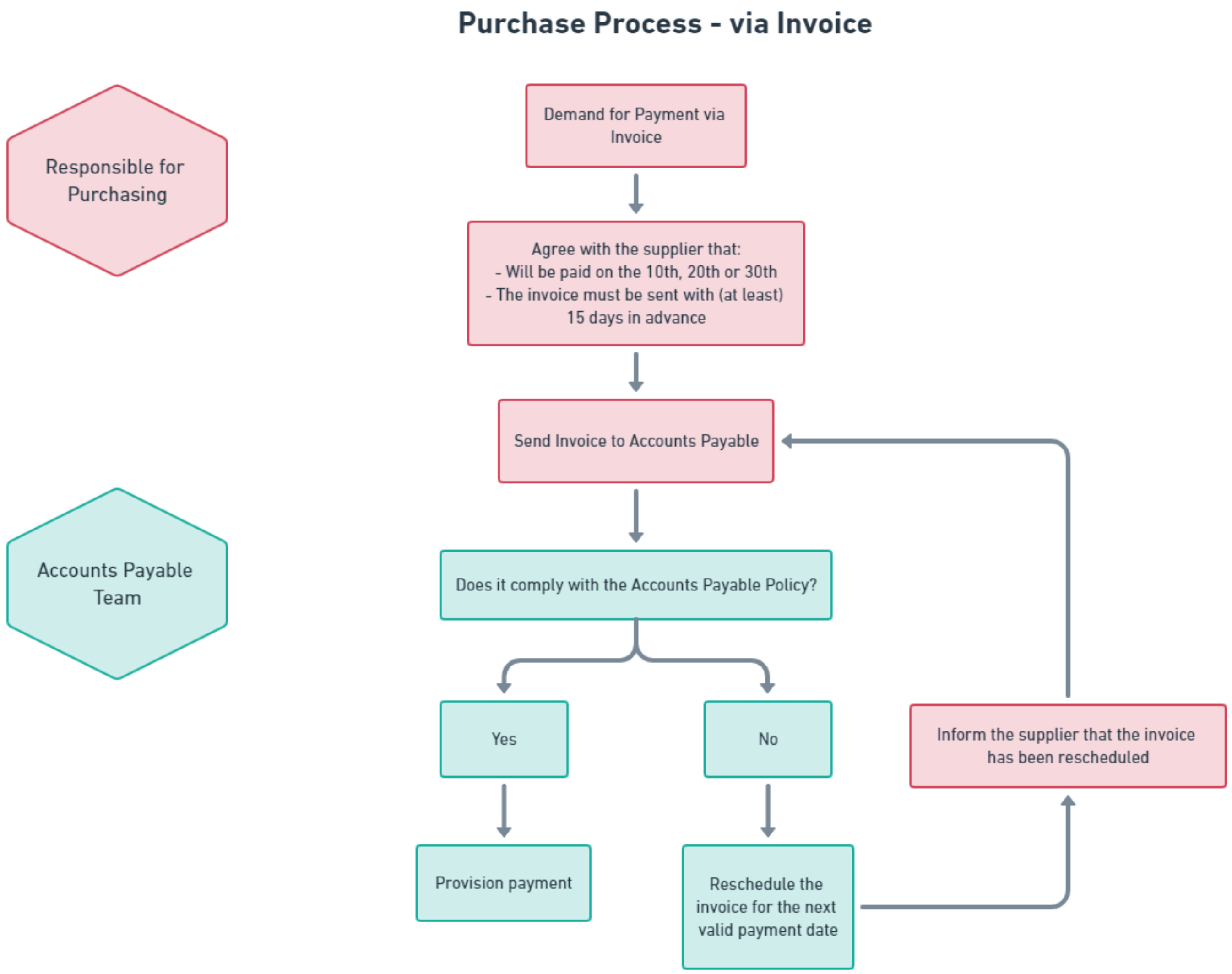
This process aims to optimize the provisioning of the company's cash flow. We manage cash availability globally and we process all payments in Brazil for all Rocket.Chat Entities; it is very important to have proper visibility of the accounts payable and better management of the Company’s cash flow, as well as optimize the treasury daily routines.

Accounts Payable Process

Applicable to all Collaborators (buyers) who make purchases on behalf of the Company

Purchases via Invoice

- **Rocket.Chat payments processing will always occur in 3 fixed dates during the month: on the 10th, 20th and 30th of each month.**
  - Exception for February, where payments will be made on the last day of the month.
- **For any purchase of service/product, make sure you have agreed with the supplier that:**
  - Payment terms should be negotiated with minimum 15 days. In case of exception, please contact **Accounts Payable Team** to find a proper solution;
  - The suppliers invoices must be sent immediately, as soon as you receive it, to the e-mail address: **accounts.payable@rocket.chat.** (Please do not hold invoices with you)
  - **The Accounts Payable Team expects to receive the invoices at least 15 days in advance of the due date** in time to proper record, provisioning and schedule the payments.
- We recommend that employees **don't make any subscriptions or contracts longer than 12 months**.
  - If you need to close a **contract that is longer than 12 months**, please **get in contact with the Finance Team**.



Purchase Process - via Invoice

Purchases by Credit Card

In addition to the invoice payment process, which is our primary accounts payable policy, it is important to describe our policies and procedures for purchases made via credit card.

- **Requirements to purchase with Corporate Credit Card**
  - **Corporate Credit Card purchases are applicable to small purchases, limited to U$ 200.00 per item and non recurring charges.**
  - **Credit card purchases must only be made in a second instance**, when there is no possibility of payment by invoice.
  - In any case that it is not possible to negotiate payment term other than credit card, please contact accounts.payable@rocket.chat.
  - We also strongly recommend you to avoid as much as possible using your personal credit card for corporate purchases.

How to make purchases using the Corporate Credit Card?

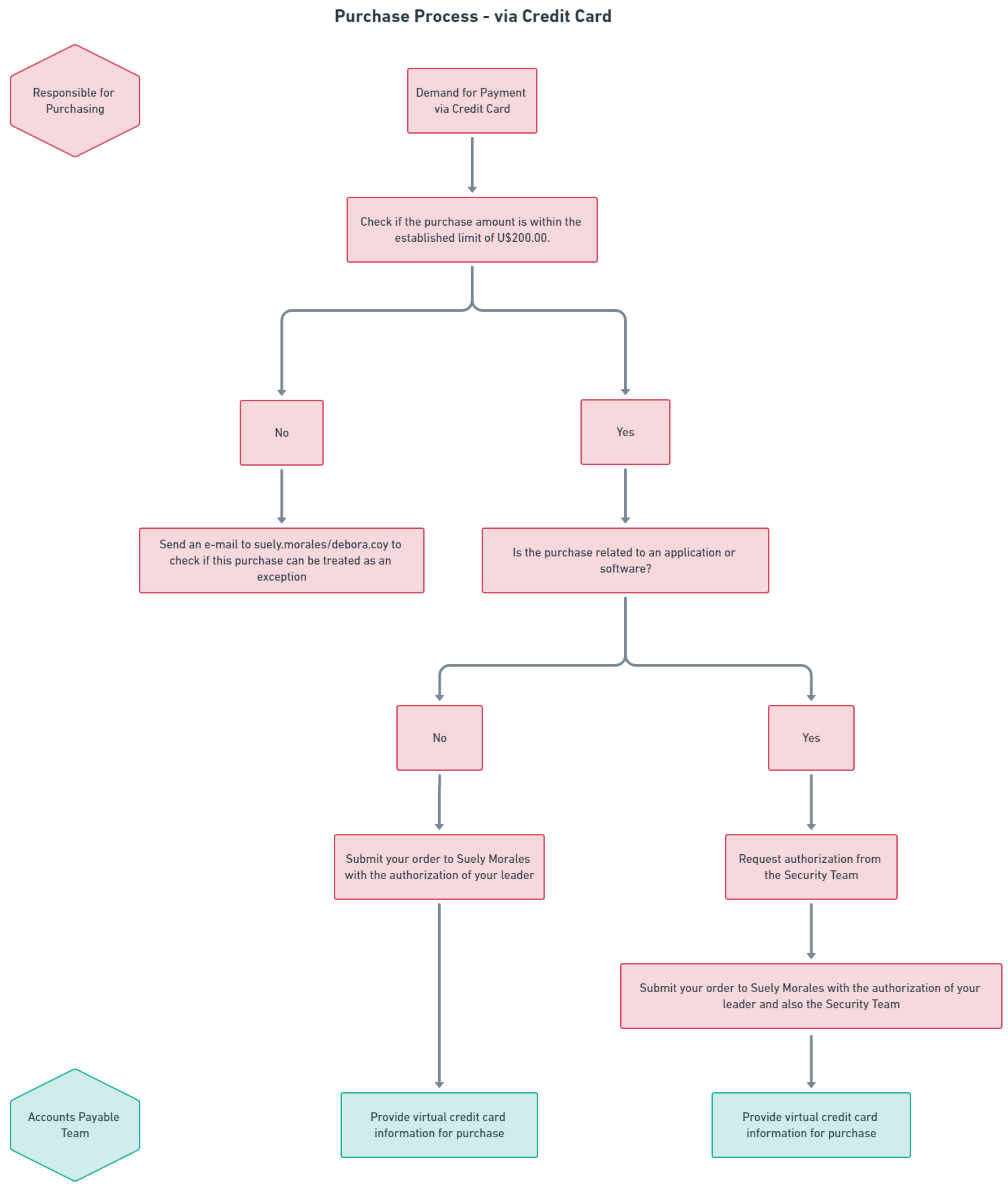
If all requirements to use Corporate credit, as mentioned above, have been met:

- You should send an e-mail to the **VP of Finance - Suely Morales Zinezi**, requesting the issuance of a virtual card including: a) the purpose of the purchase, b) the amount involved, c) name of the supplier and d) the approval of your Department Head.
- You will receive the virtual card number and the card's security code, as well as being informed of the validity period of the card. It is important that the purchase be made as soon as you receive the card data, so that the expiration date is not lost.
- You should send to accounts.payable@rocket.chat the receipts of the transaction.
- **For Applications and Software Purchases only:**
  - Purchases of applications and softwares through Corporate Credit Card should have **previous authorization from the Security Team**.
  - You should send an e-mail to **Security Team** describing the App or software you need to install in your Notebook and request his approval before getting the virtual card issued

Exception - Use of Personal Credit Cards to make Corporate Purchases

As mentioned previously, we strongly recommend employees and contractors to avoid using their personal credit card to make Corporate Purchases

- **In case of exception, and solely in situations of extreme urgency**, you should follow the procedure below:
  - Send an e-mail to your Head of Department, asking beforehand for their approval to use your personal credit card and describe the circumstances for not using the Accounts Payable Process.
  - The Head of Department is responsible for checking if such purchase is urgent, if it is related to the Company's business needs and if it is budgeted.
  - You should not make a decision to use your personal credit card without having an approval before and making sure you could request a virtual credit card.
  - If all the requirements above are met, you should submit a reimbursement request through Zoho (link here), including the copy of your Head of Department’s approval e-mail to use of the personal credit card and the expense reimbursement receipt to the Accounts Payable Team.



Purchase Process - via Credit Card

Responsibilities

It is very important that buyers inform such protocols to the suppliers in order to avoid any misunderstanding.

If the invoice due date is not in accordance with this policy, the payment date will be automatically adjusted for the next fixed date of the month, as set above, and it will be the buyer's responsibility to contact the supplier and inform the adjustment, without any charge of interest or considered as delayed payment.

Policy Effectiveness and Transition Period

- This policy is effective as of its announcement date (**May 18, 2021**) for any new PURCHASES;
- For **Contractors** and **Brazilian Individual Entities or Independent Contractors**, will take effect in **June** pay period. Meaning Contractor invoices for June will need to be delivered by **May 23, 2021** and in line with new policy;
- Should any doubts or approvals for other circumstances not included in this policy, please contact **Accounts Payable Team** to address a proper solution;
- We kindly ask the collaboration of company leaders for cascading the policies changes to the teams by:
  - **Reinforcing** information and the importance of complying with the new policies at its weekly meetings;
  - **Sharing** the presentation with the team;
  - In case of doubts, do not hesitate in contact the Accounts Payable and Payroll team for further information.

Travel Policy

What you will see in this section

Who does this policy apply to?

This policy applies to:

- **Employees in Brazil and US**
- **Contractors outside Brazil and US**
  - Our RC international collaborators who invoice the company monthly for their services.
- **Brazilian Individual Entities or Independent Contractors**
  - Our Brazilian collaborators who invoice the company monthly for their services.

What is the Objective and Why are we implementing this policy?

Objective

The purpose of this policy is to **provide clear policies and procedures that promote safe travel, and allow for reasonable and manageable travel expenses** while maintaining the necessary controls and accountability.

The policy affects many of Rocket.Chat collaborators, so please read the policy carefully and do not hesitate in contact the Finance Team in case of any doubt.

Why

Due to the company's growth and increased hiring, it became very relevant the need of standardizing the travel request and reimbursement processes.

This process aims to optimize the provisioning of the company's cash flow. We also want to make booking easier for all parties and ensure the traveller's safety.

Travel and Reimbursement Request

How to request your travel and reimbusements?

Travel Request

- All travel requests must be done using the Travel Request Form, in Zoho.
- All trips should be requested in the following time frame:
    - Domestic travel: at least 15 days in advance;
    - International travel: at least 21 days in advance.
- The travel request forms will be approved, **first**, by the **Head of the Department** and, **second**, by the **Finance **team.
    - If there are any exceptions to be approved, the Head of the Department can make an observation in the text field in the approval step.
    - Employees **should not book their own flight tickets and request reimbursement before the travel request approval by Finance** unless previously justified and approved by the Head of the Department.
- The Finance team has up to **one business day** to approve the travel request, after the Department Head's approval.

Flight Ticket Purchase

Employees Travelling from Brazil

- The Accounts Payable team will purchase the cheapest flight ticket available, according to the travel schedule specified in the travel request form.

Employees Travelling from Other Countries

- Employees should buy their own flight tickets and request reimbursement, via the Travel Expense form, in Zoho.
- Employees should choose the cheapest flight ticket available, according to their travel schedule.

Type of Flight Ticket

- Employees are expected to travel using economy class, with a few narrow exceptions (e.g. trips longer than 12 hours of direct flight time) and subject to the CEO and General Manager's previous approval.

Lodging

- Hotel rooms should be booked according to the maximum rate per night in each region:

Region	Amount per night
Brazil - state capitals	BRL 450
Brazil - other cities	BRL 250
Other Latin American countries	USD 100
USA	USD 180
Europe	EUR 120
Asia-Pacific	USD 100

- Employees should prefer hotels that include breakfast in their rates.
- If the employee chooses to book a room with a higher rate, Rocket.Chat will reimburse the employee up to the maximum daily amount per region described above.
- Exceptions, on the above rates, should be previously discussed and approved by General Manager.

Car Rental

- Employees should choose to rent cars in the “compact/ economy” category. Employees should also include third-party insurance in their booking.
- If the employee chooses to rent a car in a higher category, Rocket.Chat will reimburse the employee up to the “compact/ economy” category daily rate amount.
- Rocket.Chat will also reimburse any tolls paid during the trip, as well as fuel and parking, all subject to the presentation of the receipts in the reimbursement request.
- Rocket.Chat is not responsible for the reimbursement of traffic tickets that may incur during the trip.

Mileage Reimbursement

- If the employee chooses to use their own car on a business trip, Rocket.Chat will pay the mileage reimbursement, according to the table below:

Region	Amount per kilometer
Brazil	BRL 1.00
Other Latin American countries	USD 0.35
USA	USD 0.35
Europe	EUR 0.30
Asia-Pacific	USD 0.35

- The employee should submit an itinerary (origin-destination) and kilometres travelled.
- Rocket.Chat will also reimburse any tolls and parking paid during the trip, all subject to the presentation of the receipts in the reimbursement request.
- Rocket.Chat is not responsible for the reimbursement of traffic tickets that may incur during the trip.

Alternative Transportation

- Employees should use Uber as alternative transportation, using Rocket.Chat’s corporate account.
- To include Rocket.Chat’s corporate account in their app, employees should request Patricia Ferreira, via e-mail, including the Department Head's approval for the trip.
- Taxi or other types of alternative transportation should only be used in locations where Uber is not available and it will be subject to the presentation of receipts in the reimbursement request.

Meals Daily Voucher per Person

- Meals daily allowance will be reimbursed according to the table below (including tips):

Region	Breakfast (only if not included in hotel daily rate)	Lunch	Dinner
Brazil	BRL 25	BRL 55	BRL 75
Other Latin American countries	USD 15	USD 30	USD 55
USA	USD 20	USD 50	USD 75
Europe	EUR 20	EUR 50	EUR 75
Asia-Pacific	USD 15	USD 30	USD 55

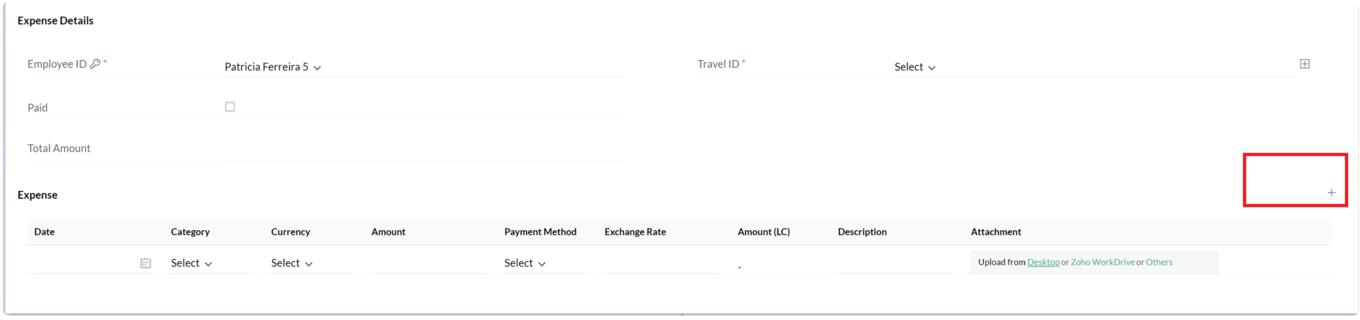
- Employees are not allowed to pay for meals for clients, suppliers, government officers and people who are not employed with Rocket.Chat. The Sales Account Executive team is exempt from this rule, although it should be conditioned to budget availability and previous approval in case of government officers.
  - In the case of government officers, the expense must be previously approved by General Manager, even before it occurs.
- Employees are not allowed to accept clients, suppliers, government officers and people who are not employed with Rocket.Chat to pay for their meals.
- Group lunches/dinners:
  - The meal should be paid for by the most senior member of the group.
  - The reimbursement will be paid to this person.

Telephone Charges

- In the case of international travel, Rocket.Chat will reimburse telephone charges incurred from the activation of international roaming.
- Employees should attach their telephone bill to the Travel Expense form, in Zoho.

Reimbursement Request

- Reimbursement requests should be submitted using the Travel Expense form, in Zoho, **up to 60 days after** the trip took place.
  - **You can submit multiple expenses** in the same form - as long as they are related to the same trip (one Trip ID per Reimbursement Request form) - **by clicking on the "+" sign** in the "Expense" field.



- **Receipts must be scanned and submitted** along with the Reimbursement template.
- Even if the purchases are made in local currency, **don't forget to fill in the "Exchange Rate" field** (with either 1 or the exchange rate amount).
- In case of **mileage reimbursement**: the employee should **submit the itinerary** (origin-destination) via Google Maps-type screenshot and **kilometres travelled**. The employee should also present receipts for any tools paid during the trip.
- In case of **international purchases using the employee's personal credit card**: the employee should **attach a copy of the credit card statement** to the reimbursement request template.
- The dates for reimbursement payment are the same as the ones for the remote benefit:
  - Every request approved until the 15th of each month (or the next business day), will be paid in the payroll cycle of that same month.
  - Requests approved after the 15th will be paid in the payroll cycle of the subsequent month.
    - e.g. If a request is made on April 13th, the reimbursement will be paid by the end of April, along with the salary payment. If a request is made on April 16th, the reimbursement will be paid by the end of May, along with the salary payment.

Inflation Adjustment

The amounts in this policy will be adjusted yearly, according to the inflation incurred in each region.

Coronavirus Pandemic

Coronavirus Pandemic

- Since we are still under a global pandemic situation, we strongly recommend that employees avoid any type of travel, unless strictly necessary.
  - If this is the case, the trip must be approved by the department head and the General Manager.
- In this situation, employees must follow all the sanitary protocols of the place they are visiting.

Payroll Schedule Process

Applicable to all Contractors and Brazillian Individual Entities

Every monthly fees invoice must be sent NO LATER THAN the 23rd of the month.

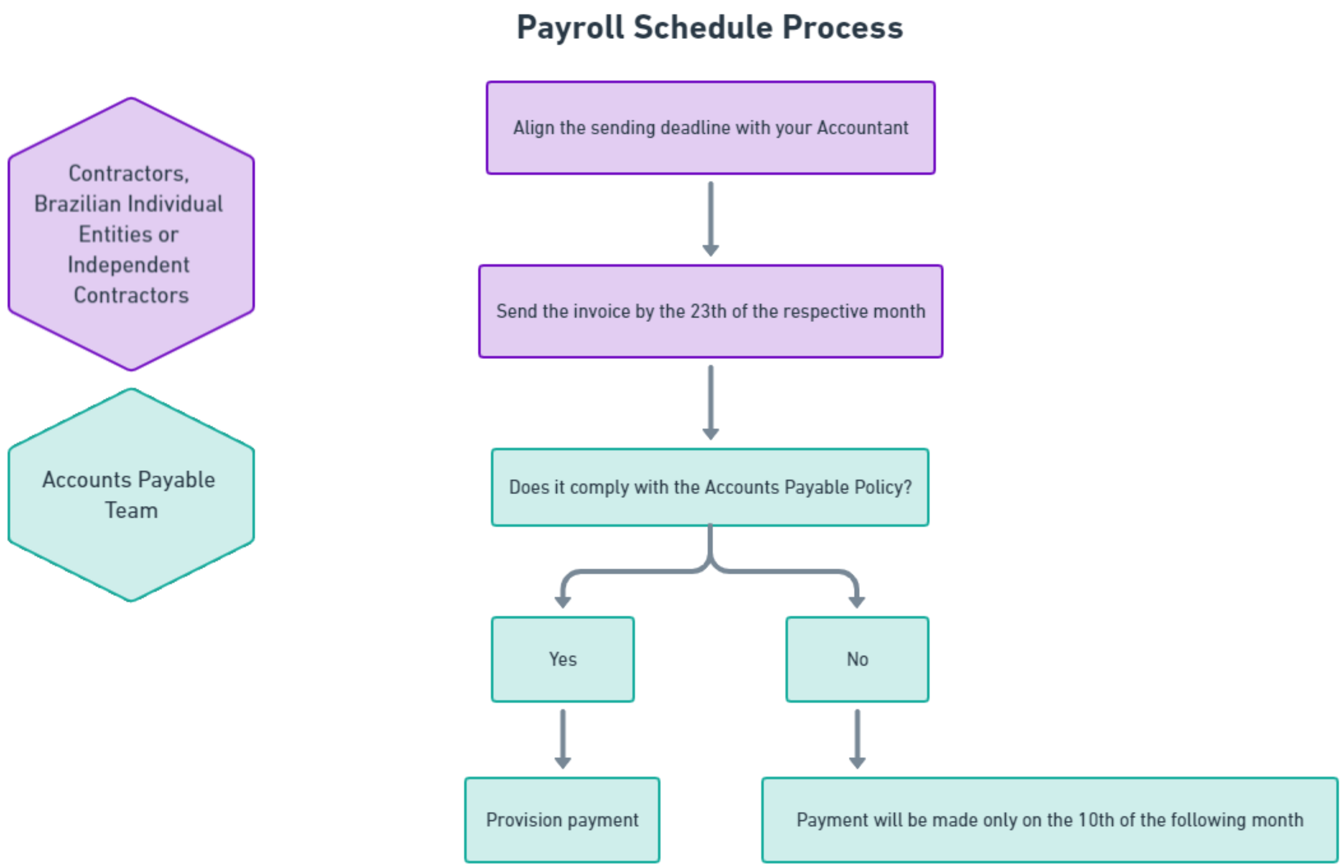
- Monthly fees will be paid on the 1st working day of the following month.
- **Example:** In order to receive your salary on the first working day of June, it is necessary that you send us your invoice by the 23rd of May.

****

Implications

It is the employee's responsibility to send the invoice to release the payment of their salary.

If the invoice is sent after the agreed date, payment will be made only on the next available payment date, in the 10th of the following month.



Payroll Schedue Process

🎙️ Marketing

What is the marketing team role and goals

The marketing team is responsible for promoting Rocket.Chat's business for a diverse and global audience, aiming to reinforce its brand positioning and benefits, driving sales of its products and services.

Goals

- Brand Positioning: Understand our audience in multiple territories, consolidate what is our brand, promote it to be recognized by the public opinion
- Lead Generation: Increase website traffic and lead conversion through content generation, keyword strategy for SEO, Paid Ads in social media and Search engine, Retargeting, and Remarketing, Co-marketing with Partners, Referral Campaigns, Events, and Newsletter. Focus on achieving sales inbound goals.
- Company Awareness: Re-emphasize our commercial services in multiple channels
- Employee Branding: Brand awareness promoting Rocket.Chat as a great place to work

Key activities:

- Brand Strategy
- Website Update
- Event Sponsorship or Promotion
- Social Media Management
- Technology Review Platforms
- Visual creations
- Sales Collateral Materials
- SEO
- Paid Advertising
- Public Relations
- Campaign Management
- Email marketing
- Content management

Content Creation

An introduction on our content strategy, types of content and how to request it.

Content Marketing: A Quick Look at Rocket.Chat's Strategy

Rocket.Chat's content strategy is based on Inbound Marketing, a methodology to attract, engage & delight customers by creating valuable content.

Types of Content

There are different types of pieces with varying goals behind each of them. The main styles used at Rocket.Chat are:

- Blog posts
- Press releases
- Social Media posts
- Ebooks
- Infographics
- Guest Posts
- Branded content

Ideation and Request

We're open to content requests and ideas from any Rocket.Chat team member; however, it's important to note that our content efforts are primarily focused on Marketing Campaigns; therefore, content pieces that are not related to our main goals might not be prioritized.

If you wish to request a content piece, follow these steps:

1. Decide on the content format
2. Create a Google Docs briefing us about the following details:
    1. Content Topic (Send as many details as possible)
    2. Target Audience (Who is our target reader for that piece?)
    3. Goal (e.g. Lead generation; Brand exposure, etc.)
    4. Results expected from the piece
    5. Main channels for content promotion (if applicable)
3. After answering these questions, message us in #rocket.chat-marketing with the final link for the briefing.

After receiving your request, the team will discuss the idea and give you a return as soon as possible.

Thank you. Let's do this! :)

Marketing Operations

Best Practices regarding marketing data management and strategy, lead and contacts management, tool process, etc

Marketing Leads Attribution Model

Marketing is responsible for bringing new leads and correctly attributing and enriching them to be sent to the sales team. The data flow starts when a new contact enters Hubspot and from this point, its origin and interest must be clear for the salesperson to work with the lead.

Lifecycle Stage and Sales Status

To identify and assign workflows for sales processes, we have in CRM and Hubspot the fields for Stages and Status**. **

Lifecycle Stages (Lead, MQL, SQL, Opportunity, Customer): focused on letting us to know the maturity of the contact, his relationship with sales.
Sales Status (New, In Progress, Disqualified, Refer to Partner, Customer): helps us to know about our relationship with the contact, if already in progress, etc. This is important to know for how long sales is working with the contact and help us to create strategies around it.
**Current Status (Active, Inactive): **can be used in all times for contacts, meaning if there is any active sales/customer relationship or not.

Both contacts and accounts have stages and status. An Account stage and status is defined by the most advanced contact stage/status. Stage Client predominate on others.

If we get new contacts to existing accounts, they will follow a brand new process, being recognized as a MQL/PQL and human interaction to understand if a new sales opportunity will be needed.

****Lifecycle Stage definitions ****

Defined by workflows created in Hubspot
****Location in Zoho: LEADS MODULE
Location in Hubspot: CONTACT MODULE

- **LEAD:**
  Description: Contacts that have interest in knowing more about us but are not sales ready.
  Identification:
  - Has Email AND Contact Source is any of: Events, Livechat, Livechat (Offline), Webinar, Outsourced, Enrichment or Download
  - Has Email AND Website Form is equal to Newsletter
- **MQL:**
  ****Description: Contacts with sales or partnership interest or with a high ICP score (Ideal Customer Profile- based on country, industry and company size)
  Identification:
  - ICP Score > 73 AND Email doesn't contain Personal Domains AND Event contains Webinar
  - Form Submission of Sales Contact Form
  - Form Submission of Partnership Form
  - Form Submission of Partner Opportunity Registration
  - Contact Source is any of Technology Review or Referral

  Automation: Every time the lifecycle status change to MQL, a task is assigned to the owner of that Lead in Zoho

Location in Zoho: CONTACT MODULE
Location in Hubspot: CONTACT MODULE

- **PQL (MQL):**
  ****Description: Product led contact that fits our Ideal Customer Profile.
  Identification:
  - ICP > 55 AND Acquisition Type is Product Led AND Email doesn’t contain Personal Domains
  - ICP > 55 AND System Admin is True AND Email doesn’t contain Personal Domains (Contacts with other Acquisition types that after a while try the product and should be recognized as PQLs because of their ICPscore)

  Automation: Every time the lifecycle status change to MQL, a task is assigned to the owner of that Lead in Zoho\

- **SQL:**
  ****Responsible: Sales
  Description: Someone qualified by SDRs through Email or Phone.
  Identification:
  - Deal Stage is Pre-Pipe\

- **OPP:**
  ****Responsible: Sales
  Description:Salesperson “Closer” is in touch with the contact developing business opportunities.
  Identification:
  - Deal Stage isn’t Pre-Pipe or Closed Won

- **CLIENT:**
  ****Responsible: Sales
  Description: Have become a customer.
  Identification:
  - Deal Stage is Closed Won

**** **Sales Status Definition:**

Workflows to update from “New” are created in Zoho

- New: When the contact changes its lifecycle stage, it always move to "New" meaning that the contact is new to the Sales/CS responsible for the current stage.
  - Lifecycle Stage: Lead, MQL/PQL, SQL, Opportunity, Customer
  - Updated: Automatically by Default
- In Progress: After any engagement of email, phone, task
  - Lifecycle Stage: MQL/PQL, SQL, Opportunity
  - Updated: Automatically with 1st Task Completed in each Lifecycle Stage
- Refer to Partner: Not for direct Sales
  - Lifecycle Stage: MQL/PQL, SQL
  - Updated: Manually By SDR when he starts working with contact
- Disqualified
  - Lifecycle Stage: MQL,PQL, SQL, Opp
  - Updated: Manually by SDR or Closer or Automatically by Deal Cancelled/Lost
  - Disqualified Reason:
    - Bad Timing: Contact in future and Nurturing
    - No Response: Stopped to reply
    - Community
    - Not a Priority
    - No Fit
    - Junk Lead
    - Competitor

Additional Fields

Current Status

Workflows updated at Zoho.
****This field is updated based on the sales relationship with a contact regarding ongoing negotiations or customer relationship. Leads, Contacts and Accounts can be classified as Active or Inactive.

_Leads module at Zoho CRM (In future) _
__Lifecycle Stage: Lead, MQL
Current Status Active: Leads with Sales Status New, In Progress or Refer to Partner
Current Status Inactive: Leads with Sales Status Disqualified
Update: Automatically based on Sales Status

Contacts module at Zoho CRM
Lifecycle Stage: MQL, SQL, Opportunity
Current Status Active: Contact with Sales Status New, In Progress or Refer to Partner
Current Status Inactive: Contact with Sales Status Disqualified
Update: Automatically based on Sales Status
Lifecycle Stage: Customer
Current Status Active: There is an active deal OR an open renewal OR active workspace that is not on trial.
Current Status Inactive: Customer doesn't have any open deal or active contract or active workspace.
Update: Automatically based on workflows at CRM

_Accounts _
__Follow the current status of its contacts, giving priority to Active. Update: Automatically based on workflows at CRM

Acquisition Type and Source:

Acquisition Type Inbound, Outbound and Partner are updated through Hubspot Workflow
Acquisition type Product are updated from Fleetcomand and sent to Hubspot

Acquisition Type	Source
Inbound	Website Form, Webinar, Download, Technology Review, Referral, Events
Outbound	Enrichment, Outsourced
Partner	Referral
Product Led	Community, SaaS, Enterprise

Third Level Attribution

Website Form: Single Line

When the source is Website Form, this field is obligatory and its value will indicate which field the registration came from. Ex: Sales Contact

****Event: Single line ****

When the source is Webinar or Event this field is used to identify which event or webinar.
Field format: EventFormat: Month-Day-Year-Name
Example: Webinar: 08-24-21-Hybrid-Work-Work

Referred by: Drop Down

Options: Client, Employee, Partner
When the source is Referral.

Partner Name: Single Line and Association Field

When the source is a Partner, the ideal is to identify which Partner is responsible, for now we are able to bring that information in single line format and as the Partner team receives the information in the qualification process, when they create the association the info goes back to Hubspot.

First touch converting campaign: Single Line

Automatically filled with details of which campaign brought the lead to Hubspot.
Ex: ads, content download, social media, page views

****Last touch converting campaign: Single Line ****

Automatically filled with details of which campaign the lead last converted.
Ex: ads, content download, social media, page views

Recent Conversion

This field brings the most recent conversion that a contact had, it could be a form submission to subscribe for a webinar, download a eBook or ask to become a partner. \

Team

Team structure, role and working hours

Carolina Freitas
Marketing Analyst
Brazil, GMT-3
****carolina.freitas@rocket.chat
Role: Oversees outbound strategy, including Events Strategy, including Digital or In person, Webinars Production, Newsletter (Plan and Structure), Paid Ads, Review Platforms, Co-marketing with different Channels, take care of Partnerships Relations, Campaign Data, Mail marketing, Social Media focused on Employer Brand, Brand Awareness and Lead Generation.

Lucia Fallavena
Content Marketing Analyst
Portugal, GMT+0
****lucia.fallavena@rocket.chat
Role: Oversees inbound strategy through content, including blog articles, sales collaterals, press releases, newsletter feeding, social media campaings, public relations strategy.

Manuela Massochin
Digital Marketing Intern
Brazil, GMT-3
****manuela.massochin@rocket.chat
Role: Helps with social media management and customer engagement, technology review platform updates, content creation for blog articles, email marketing, event production, market research and public relations with community and digital influencers engagement.

On Boarding Overview

How the On-boarding works, Company and Product Overview

Welcome to our Family! You are now a Rocketeer and we are happy to have you in the team!

Rocket.Chat is changing the way organizations of all types communicate. Since it's foundation the company has focused its image into open source rather than its commercial services. The marketing challenge for 2020 is to start from the beginning with brand and positioning, social media awareness, content creation, tracking of conversions, public relations, etc. 2020 is a complicated year, besides being the year where the company is aiming to move for the third round of investment, there is a global pandemic that is forcing all companies to work remotely, which can be extremely helpful for Rocket.Chat's industry, bringing strong competitors and opportunities.

This document brings multiple information about our company and product, as well as a list of tasks to help you to understand the different areas of the Rocket.Chat, divided by day in the suggested order of execution for you to do throughout the on-boarding process.

Company Overview

Rocket.Chat Growth Story

We are a communication and collaboration platform for companies. Our origin comes from the open source world, which means the code behind our product is collaborative, developed by thousands of developers worldwide. In 2015, we started as a Github post to create the best team chat platform, an alternative to Slack, we grew very fast due to word of mouth of developers interested in this project. The open source side of Rocket.Chat is also known as our Community Edition, which is free of cost and anyone can download it and self install. This model has attracted customers organically with an almost zero investment in marketing, in addition to participation in events and website maintenance.

Since 2018 the company has been changing to also offer commercial licenses, which are constituted by support services + private code features. Over the years, the company tested different models, even offering customization and development services for specific features, but this took the focus away from official Rocket.Chat employees to develop the enterprise product, often ending up spending more money and time than the projects paid for. We are currently the largest open-source platform in the world with over 1,000 developers who have already contributed to the product. In addition, we have registered more than 780,000 servers installed in more than 150 countries and more than 12 million users.

Between 2017-2018 we had a team of 3 people in marketing, some marketing activities like google analytics and ads happened, but with very little information to the rest of the team about the results. In 2019 we formed a sales team focused on territories: North America, APAC and EMEA. By February 2020, the current marketing team started and all the possible challenges appeared, like collecting testimonials, creating use cases, defining our unique selling points, changing the website, creating video content, etc. There is a lot to be done.

Rocket.Chat has a very diverse audience, from the United States Government to a church in Germany and a call center in Singapore. We need an international strategy and we need a focus to increase our Leads volume. We realize that our biggest buyers today are of technical bias, as they appreciate the level of security and customization that we offer, which sets us apart from the competition. We need to focus internationally on decision makers and not just on developers, who mostly use us for free.

Company structure

Thanks to our wonderful platform, Rocket.Chat counts with employees in different countries, all working remotely seamlessly through https://open.rocket.chat, our company communication server. You can see our team composition here.

What is Rocket.Chat

Video: The Leading Communication Hub

One platform for multiple uses: Remote and Physical Work, Internal Communication, External Communication, Omnichannel Conversations, Customer Engagement and Support, Developer Operations, Project Management and Process automation.

Main Solutions:

- Omnichannel Customer Engagement
- Team Collaboration
- DevOps

Main Verticals:

- Education
- Technology
- Finance
- Healthcare
- Events

Pitch: Centralize Your Communication and boost your company productivity by bringing messages, video calls, file sharing, and all team communication into one place. A reliable open source communication platform for the enterprise world, trusted by millions of users in 150 countries for high-private team chatting and collaboration. Reduce operational costs and improve customer experience by bringing messages from employees and external customers on the same platform. Secure your data with self-managed deployment or Rocket.Chat's cloud hosting.

Pitch 2: Security starts by downsizing the number of tools you use. Improve your team's productivity by 30% with the best cost-benefit communication platform for the enterprise market. Omnichannel engagement, Team collaboration and DevOps in one flexible and compliant tool, GDPR, HIPAA, CCPA, your data is secure. Seamless adaptation to all company sizes with unlimited integration with other daily tools. Centralize your communication and join millions of Rocket.Chat users worldwide.

On- Boarding Activities

Follow Rocket.Chat in all social medias

1. **Facebook**
2. **Linkedin**
3. **Twitter**
4. **Instagram**
5. **Youtube**

Day 1 - People

Our People's Team will onboard you in our culture, structure and the following weeks.

- Who are we? Round of presentations
- Presentation of the onboarding track
- Culture Code
- Strategic objectives
- Entering Rocket.Chat: Platform presentation
- Platforms and systems: Gmail, Rocket.Chat, Github, Zoho (People, Vault, CRM, Desk, Sign, Social, Analytics, Campaigns), Asana, Officevibe, italki
- Create a user on Rocket.Chat (firstname.surname) with Rocket.chat's email
- Create a user with the Rocket.Chat domain on GitHub
  - Follow the public Rocket.Chat repository
  - Give a Star to the Rocket.Chat project on Github
- Mental Health guide
- Processes: Check-in, 1:1, refund benefit, PTO, vacation, weekly, Officevibe
- English and Tech courses
- Onboarding Videos
- Handbook: email signature, security onboarding, PTO, travel policies
- Security steps: video intro, policies, device configuration
- Events: Rocket.Chat Summit

Day 2 - Company Overview

Additional videos to help you to understand the company and product.

1) Watch the videos about the company and our history:

1. What is Rocket.Chat
2. (50min) - Gabriel Engel
3. (18min) - Gabriel Engel

2) Analyze our the website and news about our current investors
NEA - https://www.nea.com/
Monashees - http://monashees.com.br/pt-br/
OneVC - https://www.onevc.vc/
DGF - https://www.dgf.com.br/

3) Install the Rocket.Chat app on your mobile phone and computer

1. Connect to our company server, https://open.rocket.chat
2. Create a user, with firstname.lastname

4) Ask to be added to Work related channels in Open

Important - important announcements for the whole company
Random - random topics, anything funny
proofread - ask help of native speakers for content proofread (english, spanish, german)
marketing-strategy - private channel for the marketing team
marketing&design - channel with the design team
marketing-content-sharing - share social media posts with the company for them to share
rocketchat-sales - open channel of sales team with the company
rocketchat-marketing - open channel of marketing team with the company
rocketchat-website - open channel of website with the company
rocketchat-office - channel for office related topics, like scheduling barbecue hehhe Porto Alegre staff only
rocketchat-q-and-a - robot that brings daily questions about your mood and thoughts to be shared with the company
competitors - any related topic about competition

5) Make a Rocket.Chat Demo (start a demo), collect impressions during the two weeks trial period. [https://rocket.chat/

](https://rocket.chat/)6) Video Explanation of our product from our CEO, Gabriel Engel (2hs)

Day 3 - Marketing

Ready for the good stuff? Today we will dive into the marketing team's challenge.
7) Welcome Meeting
8) Listen to Marketing's Team Weekly Meeting
9) Get access to all marketing platforms
10) Attend Social Media Calendar Meeting
11) Review our mentions in Capterra and G2Crowd to understand what clients think of us. Create a report with suggestions of topics to be addressed in our social media platforms.
12) Schedule workshop with Carol to learn more about her activities
13) Schedule workshop with Lucia to learn more about her activities
14) Review our competition and their communication - marketing strategies. Create a report with suggestions to improve our website and social media content.

- Slack
- Mattermost
- Flock
- Zendesk

Home Work:

1. Read Blog Use Cases
2. Rocket.Chat's personas
3. Gartner ITXpo, Gabriel Talk about Rocket.Chat
4. Gartner Vendor Briefing

Day 4 - Sales

Leandro Coletti is the VP of Revenue and together with him we have a team of salespersons that are focused on increasing our revenue through private coded features and support services. One of the main goals of marketing is to generate inbound leads for the sales team, therefore we have a close relationship with them to better understand the needs of each region. Our sales team is divided by regions: North america, EMEA and APAC.

Rocket.Chat is like wordpress, a free software that can be downloaded by any person in the world and used as they wish. Regarding our commercial offer, we have 2 main divisions:

- Rocket.Chat SaaS / Cloud: Rocket.Chat takes care of the hosting infrastructure, updates the client server and the client does not have to worry about anything. Support service is included besides premium features. We offer a 14-day trial here.
  - Average ticket: USD1,200/year
- Self Managed Enterprise Licenses: the client installs the solution and host it themselves, they can purchase an enterprise license to unlock premium features and get support from our team.
  - Average ticket: USD15,000/year

15) Schedule Meeting with Leandro Coletti. Main points of talk

1. Explanation about sales structure
2. Profile of buyers on SaaS and on Self Managed
3. % of sales per type of product
4. Average trials per month
5. Team Metrics and Goals
6. Show Zoho Analytics
7. Sales challenges

16) Check Rocket.Chat's Pitch Deck (30min) - Gabriel
17) Sales Pitch: (Gartner Symposium - 20min) - Gabriel
18) Partner Program
Send questions directly to bruno.solis through Rocket.Chat to answer asynchronously.
19) Enterprise customers, Deals and Partners Worldwide
20) Read the information in Zoho Desk/KnowledgeBase

Day 5 and 6 - Product

You can find our product documentation here, in case you are in doubt about features we offer or how to use them, you can easily find the documentation there. In case you don't find something, take note! We need to keep on improving it.

The goal of this day and the following is to make you more comfortable with our product. If you have any questions, don't hesitate to ask. Get popcorn and get comfy, there are a lot of videos to watch.
22) Community explanation (1h10min) - Rodrigo
Send questions directly to rodrigo.nascimento through Open.Rocket.Chat
23) Back-end Explanation (1h20min) - Rodrigo
Send questions directly to rodrigo.nascimento or diego.sampaio through Open.Rocket.Chat.
24) Marketplace (40 min) - Douglas
Send questions directly to douglas.gubert through Open.Rocket.Chat
25) Marketplace App Development (56 min) - Douglas
Send questions directly to douglas.gubert through Open.Rocket.Chat
26) Support Team (1h) - Rogério Sabóia
Together with others that are onboarding with you, schedule a presentation with rogerio.saboia about the support processes. After the presentation, send questions directly to rogerio.saboia through Rocket.Chat
27) Security (1h) - Markus
Send questions directly to markus.kirsch through Rocket.Chat to answer asynchronously.
28) Front End/Mobile (25min) - Gazzo
Send questions directly to guilherme.gazzo through Rocket.Chat to answer asynchronously.
29) Cloud (50min) - Aaron
Send questions directly to aaron.ogle through Rocket.Chat to answer asynchronously.
30) Omnichannel (1h32min) - Renato
31) Live Chat (30min) - Renato
Send questions directly to renato.becker through Rocket.Chat to answer asynchronously.

Additional Information

1) Read the information in Zoho Desk/KnowledgeBase
2) Ideas on How to make money with open source

There are many videos about products, features, companies and ask me anything and you can explore during the weeks as additional knowledge.
3) Culture manual
4) Watch the video of the Culture workshop

Rocket.Chat's Brand Guidelines

General branding guidelines: Before using our brand, read the Brand Guidelines document on docs.rocket.chat. Our is one of the main resources to identify Rocket.Chat. So, using it consistently and coherently is fundamental to strengthening our brand image.

Official assets: You can view a few of Rocket.Chat's design assets, including images, logos, conference materials, and promotional videos on our shared drive.

Official Rocket.Chat logos: If you're just looking for a .png or .svg version of our logo, you can find it here.

Website

The marketing team is responsible for managing Rocket.Chat's website.

Technology

Rocket.Chat's website is built on top of Wordpress, the visual creations are powered by Elementor Pro with custom template created for the brand.

Update Requests

Add proposal in the Website's Click-up project and repost the request in the company channel *#rocketchat-website.*

Webinar Process

A webinar is a video workshop, lecture, or presentation hosted online where only one side has access to the streaming of content.

Any Rocket.Chat team member can host a webinar with the Marketing Team help, but the definition of dates and availability is in charge of the marketing team. After approval, from that date to the webinar, four weeks of preparation are requested.

Before Webinar - Registration and Promotion

Ideation and Request

1. Decide on the Webinar Format (Q&A, AMA, Presentation, Conversation)
2. Choose:
    1. Topic
    2. Duration of webinar
    3. Desirable dates, if any
    4. Speaker name(s), Linkedin Profile(s), Picture(s) and Mini Bio(s)
    5. Target Audience (Country, Age, Job Seniority, Job Title, Company Size, Industry)
    6. Language of webinar
    7. Create a briefing that has the primary goal of the webinar and what will be discussed.
    8. Define 5 keywords for the topic
3. Research about outreach partners
    1. Inform Who
    2. What is the suggested outreach partnership
4. Create a request for a webinar in ClickUp with Inbox Status

Approval

1. The host will be directly notified to chose an available date
2. The host will introduce the organization to the outreach partner if payment is necessary, budget needs to be approved first with VP of Sales and General Manager

Registration

Performed by the Marketing Team

1. Create a list for attendee subscription in Zoho Campaigns
2. Create a new contact form in WordPress with “Webinar + Name” in the title

a. Form:

`<div class="forms-rocket">`

`[hidden Lead_Source default:"Webinar"]`

`[hidden Website_Form default:"Webinar"]`

`[hidden Lead_Status default:"Not Qualified"]`

`<label for="firstName">FIRST NAME`

`[text* First_Name id:firstName class:inputrocket placeholder"Type your first name"]`

`</label>`

`<label for="lastname">LAST NAME`

`[text* Last_Name id:last_name class:inputrocket placeholder"Type your last name"]`

```
</label>

<label for="email">EMAIL ADDRESS

[email* Email id:email class:inputrocket placeholder"Type your email address"]

</label>

<label for="Phone">PHONE</label>

[intl_tel Phone id:phone class:inputrocket]

<label for="company">COMPANY

[text Company id:company class:inputrocket placeholder"Type your company name"]

</label>

[hidden g-recaptcha-shared default:"c0d27634-5093-4c80-908d-b629abe71662"]

<span class="texto-form-webinar">By submitting this form, you are confirming you have read and agree to our <a href="/terms/"><b>Terms</b></a> and <a href="/privacy/"><b>Privacy Statement</b><a/>.</span>

[submit id:formsubmit class:btnrocket "Register"]

</div>
```

b. Mail:

To: wordpress@rocket.chat

Subject: Webinar + Name of Webinar

```
Message: [Lead_Source]

[Website_Form]

[Lead_Status]

[First_Name]

[Last_Name]

[Email]

[Phone]

[Company]

[g-recaptcha-shared]
```

c. API integration:

Send to API: Check
Base URL: https://mail-contact-form.rocketchat.now.sh/campaign/addcontact

Input type: json

Method: POST

```
JSON Template: {"listkey":"add-here-list-key-from-zoho-campaigns","contactinfo":{"firstName":"[First_Name]","lastName":"[Last_Name]","email":"[Email]", "phone":"[Phone]", "company":"[Company]", "Website_form":"[Website_Form]", "Lead_Status":"[Lead_Status]", "Lead_Source":"[Lead_Source]"}}
```

1. Generate the Live Streaming in Streamyard
2. Add the webinar with all details in WordPress
    1. Use provided a description to create event
    2. Use shortcode from the contact form to add the subscription form
    3. Review and Publish

Promotion

Once the webinar is set, the marketing team will work on promoting the event.

1. Create a media kit for the event with Facebook, Linkedin, and Twitter format
2. Schedule Social Media Ad Focused on Target Audience 3 weeks before the webinar
3. Schedule Social Media Posts for current Audience in Linkedin, Facebook, and Twitter
4. Publicize Event in Newsletter
5. Publicize Event through E-mail Alert - Opt-in list of people who have asked to be notified of upcoming webinars.
6. Publicize Event with Outreach Partner (Optional)
7. Create flow to remind attendees of Event in Zoho Campaigns
    1. *1 reminder 3 weeks prior to event*
    2. *1 reminders 2 weeks prior to event*
    3. *2 reminders 1 week prior to event*
    4. *1 reminder 1 day prior to event*
    5. *1 reminder 0 days prior to event*

During Webinar

1. Login in: https://streamyard.com/broadcasts
2. The transmission will be available on Youtube, LinkedIn (Event Page or Profile Page) and Facebook live
3. The host shows “welcome” banners or slides on the screen
4. The presenter can use visual aids, like a well-designed slide deck, to summarize key points.
5. The presenter can interact with audience members by generating questions, chats, feedback captures, and question prompts to ramp up engagement.
6. The host can share the Landing Page related to the topic during the Livestreaming
7. Finalize answering all questions and being available for further inquiries via email

Follow up After Webinar

The marketing team will be responsible for content generation after the event.

1. Two Follow up emails are sent to attendees via Zoho Campaigns providing a link to view the webinar record and download presentation slides (in case of Presentation Format). CTA to schedule demo can be included.
2. Webinar recording link with Thumbnail will be added to the Webinar Page in WordPress.

Product Profiles

This is a list to keep info consistent around Internet, check and update periodically: logo, descriptions, screenshots, setup instructions, links not working anymore, other ...

Official listing, we have complete control to change and approve changes:

- DigitalOcean Marketplace https://marketplace.digitalocean.com/apps/rocket-chat
- AWS marketplace https://aws.amazon.com/marketplace/seller-profile?id=dcb2092b-ef39-40bd-bc7c-f2394fa75ba7
- Snap Store https://snapcraft.io/rocketchat-server
- Univention UCS https://www.univention.com/products/univention-app-center/app-catalog/rocketchat/
- Helm chart https://github.com/helm/charts/tree/master/stable/rocketchat
- DockerHub
  - https://hub.docker.com/r/rocketchat/rocket.chat
  - https://hub.docker.com/r/rocketchat/rocket.chat.enterprise
  - https://hub.docker.com/_/rocketchat - Store listing
  - https://hub.docker.com/_/rocket-chat - Official image
- Docs https://docs.rocket.chat/
- Website https://rocket.chat/
- Gmail (the signature if logo changes)
- Twitter https://twitter.com/RocketChat
- Github https://github.com/RocketChat

3rd parties or partners listings, depending on the case we have to or should push changes, but the partner or 3rd party has to approve them:

- Heroku https://elements.heroku.com/buttons/rocketchat/rocket.chat
- Not sure who this is but says partner https://www.fairkom.eu/rocketchat

Reviews

https://www.techradar.com/reviews/rocketchat

UTM's Best Practices

UTMs are the way we track users coming to our website from external sources. They are a set of parameters that can be added to the URL to have a clear tracking of the user.

When to use UTMs

Every time an external source of traffic is referred to our website. That includes (but is not limited to):

- **Paid ads and campaigns**
- **Social media posts**
- **Email campaigns**
- **Guest posts**

And so on.

When **not** to use UTMs?

UTMs should not be used on links inside our website (i.e. a CTA in one of our product pages).

Parameters

There are 5 elements that can be added to the UTM in order to tag the user:

- Source (mandatory)
- Medium (mandatory)
- Campaign (mandatory)
- Term (optional)
- Content (optional)

These parameters will contain information about our traffic, specifying and categorizing the users according to how they got to our website. The terms used should be as simple as possible, in order to make our Google Analytics understandable. The information should be arranged taking into consideration the following:

Source

Who?

Where was the user before they got to our website? This parameter should answer the question: *who is sending us this traffic? / where did this user come from?*

From?

Example: `google`, `bing`, `github`, `facebook`, `twitter`, `instagram`, `linkedin`, `newsletter`, `blogs`.

Medium

How?

The medium is the way that the user, that was previously on another website, came to Rocket.Chat. It should answer the question: *how did the user get here? / what was the medium that brought the user here?*

Example: `organic`, `paid, cpc`/`paid-search`, `email`, `display`, `banner`, `referral`.

Campaign

Why?

The campaign name should identify the name of the campaign that has brought the user to our website. It should answer the question: *why did the* *user engage with our website? What was the reason that brought the user to our website?*

Example:: `omnichannel` , `webinars` *(marketing team campaigns),* `remarketing` , `en-lookalikes` *(specific target audiences)*

Term

This parameter is only used on paid search UTMs *(paid-search, ppc, cpc)* to identify the keyword that the user has searched. It should answer the question: *which keyword did the user search to get to our website?*

I.e: `team+collaboration` , `live+chat` , `open+source+slack`

Content

This parameter is used mostly for A/B testing and to identify different contents inside the same website. Let's say we want to test which CTA works best at the end of a newsletter (Learn More x Click Here), this is the parameter we'd use to differentiate the traffic coming from the testing.

To see this parameter on Google Analytics, you need to use the Keyword dimension.

UTM do's and don'ts

- Create the UTM URL by filling up the blanks on the URL Campaign Builder.
- Use lowercase letters at all times.
  - ✅ `utm_medium=paid-search`
  - ✖ `utm_medium=Paid-Search`
- Use hyphens to separate the words, not underscores.
- Avoid redundancy: if a term is already on the UTM, it shouldn't appear again (i.e.: `utm_source=facebook&utm_medium=facebook-organic`)
- Watch out for what's been previously done and follow the pattern. If the UTM that's usually used is `utm_medium=social` , don't create a new one with `utm_medium=social-media` .

Examples of UTMs:

Post on LinkedIn:

`utm_source=linkedin&utm_medium=organic&utm_campaign=social`

LinkedIn Ad:

`utm_source=linkedin&utm_medium=ads&utm_campaign=09-09-20-webinar-smb-omnichannel`

Capterra PPC:

`utm_source=capterra&utm_medium=ppc&utm_campaign=review-platforms-paid`

Newsletter:

`utm_source=newsletter&utm_medium=email&utm_campaign=newsletter-september`

Company Positioning and Messaging

Find below Rocket.Chat's new positioning with approved boilerplate messaging.

Official slides with positioning & messaging here.

What is Rocket.Chat?

The communications platform that puts data protection first.

The One-liner

Rocket.Chat brings data protection into every conversation.

The One-Paragraph Elevator Pitch

Rocket.Chat is a communications platform that enables real-time conversations between colleagues, with other companies or with your customers. It does everything other platforms do, except exposing your data.

The 100 Words Description

Rocket.Chat is a fully customizable communications platform for organizations with high standards of data protection.

It enables real-time conversations between colleagues, with other companies or with your customers, regardless of how they connect with you. The result is an increase in productivity and customer satisfaction rates.

Everyday, tens of millions of users in over 150 countries and in organizations such as Deutsche Bahn, The US Navy and Credit Suisse trust Rocket.Chat to keep their communications completely private and secure.

Who are the companies that value our product?

Companies that handle sensitive customer or business information

1. **Companies that are in highly regulated industries**
2. **Companies that handle sensitive customer or business information**

Think industries: Government & defense, financial services / banking, healthcare...

Unique Differentiators

1. **SaaS or Self-hosted.** Control over the stewardship of your data. ****
2. **Privacy & security first.** E2E encryption, ISO 27001 certified and compliant with GDPR, CCPA, LGPD and HIPAA. ****
3. **Full access to the code.** Unlimited customizations, security assurances and ability to see and contribute to the roadmap.
4. **Every conversation. Every channel.** Talk to colleagues, partners, vendors, website visitors or customers, regardless of the channel they choose to connect with you.

Against Open Source Competitors:

1. **Truly Open Source.** Only player offering MIT license. ****
2. **Every conversation. Every channel.** Talk to customers, partners, vendors, website visitors or customers, regardless of the channel they choose to connect with you.

Against Slack & MS Teams:

1. **Self-hosted option.** Control over the stewardship of your data. ****

1. **Self-hosted option.** Control over the stewardship of your data.
2. **Full access to the code.** Unlimited customizations, security assurances and ability to see and contribute to the roadmap. ****
3. **Privacy & security first.** E2E encryption, ISO 27001 certified and compliant with GDPR, CCPA, LGPD and HIPAA.
4. **Connect across Slack & MS Teams.** Use Rocket.Chat to communicate with people who message you from Slack or MS Teams.

****

Social Media Content: How To Contribute

Learn how to be featured on our social media channels and get to know our social media guidelines.

Our marketing team is always looking for ways to create amazing content! We believe that by engaging people from different teams in content creation, the final result is always more compelling and engaging. **That's why everyone is more than welcome to help us create content for our blog and social media!** Here's how to collaborate with us and how to be featured on our social media channels:

The official touchpoint between the marketing team and other teams is the channel `rocketchat-marketing`. Whatever you need (suggestions, questions, and so on) you can reach out to us there.

To start things off, these are our social media channels:

- **Linkedin**
- **Facebook**
- **Twitter**
- **Instagram**
- **YouTube**

We also have a channel on Open where we share all-things content. Feel free to join: `marketing-content-sharing`.

Being featured on Rocket.Chat's social channels

A big part of our social media strategy is showing our everyday life on Rocket.Chat and talking about the amazing people that are part of our team. So don't be surprised if someone from the Marketing team asks you for a testimonial or interview: **we just want to show your amazing work to the world!** However, feel free to tell us if you don't feel comfortable doing it - we're not going to post anything you don't want us to. :)

Sharing content from private accounts

Our company is growing at a fast pace - and we're sure many interesting posts are being made on every rocketeer's LinkedIn/Facebook/etc. However, we have a social media strategy and calendar for our company's social channels and it wouldn't be feasible if we were to share everyone's posts on Rocket.Chat's account.

However, we know how talented and capable our rocketeers are. Therefore, if you'd like to be featured on our social media channels with authorial content, you can do that by **contributing with content for Rocket.Chat's official channels.** You can write blog posts, be featured in social media posts, and much more as long as it's discussed with our marketing team and done under the name of Rocket.Chat.

Co-creating content

We love spreading the word about our product and we're always looking for technical help to speak about it. **We'd love to hear your content ideas:** all you have to do is talk directly to any member of the marketing team or through `rocketchat-marketing` and brief us. We'll then discuss if it's aligned with our social media strategy and which better way we can display the content (through a post, an article on our LinkedIn, a blog post, a webinar, etc).

How to contribute

1) Suggest the topic for the marketing team on `rocketchat-marketing.` Keep in mind that it should be aligned with our content calendar or topics aligned to our company/industry/goals. :)

2) You'll be the author and will be credited for it, but the content will be published under Rocket.Chat's official channels.

3) Feel free to use your creativity. You can write a post, but testimonials, guides, videos and so on are also welcomed. :)

4) Once the topic is approved, please come up with a draft and share it with the Marketing team (keep in mind that we don't have the manpower available to create it from the scratch, only to proofread it).

5) Draft finished? Then share it with our marketing team. We'll be glad to proofread it, making sure it fits our tone of voice.

The content created doesn't necessarily have to be product-focused - for example, someone from the support team can write tips about how to manage a support queue or someone from the sales team can write an article about how to rock a presentation. It's all up to you! Let's become partners in ~~crime~~ content? :)

🧑‍✈️ Operations

The Operations Team is comprised of the following teams:

- Data & Analytics
- Internal Communication Plan
- Program Management
- Revenue Operations
- Security

Data & Analytics

Purpose

Collect, clean up and organize data across the whole organization to generate business intelligence products and make data-driven decisions.

Getting Started

If you just started at Rocket.Chat or you want to know more about how to access data and reports, please check the Data & Analytics Zoho Analytics Onboarding document.

If you want to know more about our Data Lake ou must check the Data Lake subject.

How we work

The Data & Analytics team is one of the main Cross-Functional Teams at Rocket.Chat, working closely together with several other teams and departments. Due to this characteristic, we receive a lot of new data product requests. To better triage these requests and properly assign capacity to them, we developed a form called "Data Request Form", where the requestee must provide extensive details about which kind of data they need, how are they going to use it, main stakeholders, etc.

Tutorials

We have tutorials for the following topics:

- Consolidation 2 Guide
- Monthly Company Update Tutorial
- Quarterly BoD Meeting Tutorial
- Self-Service Revenue Tutorial
- How to Update Community Composite Index

Find all of them in this folder.

Whimsical Flowcharts

There are several flowcharts and mind maps regarding Data & Analytics structure and processes. Most of them are referenced throughout the tutorials and the handbook, but find the most important ones below:

- Data & Analytics Mind Map
- How does our billing management work (to be revised)
- Usage Stats Policy (to be revised)
- Rocket.Chat Organization Structure (to be revised)
- Recurring Revenue Concepts (to be revised)
- Data flow Zoho <-> Fleetcommand (to be revised)

Members and functions:

- Gustavo Ciciliati: Data Analyst
- Isis Santos Costa: Data Analyst
- Tania Lomazi: Data Analyst

Data Lake

What is the Data Lake?

A data lake is a centralized repository that allows you to store all your structured and unstructured data at any scale. In our infra we are collecting data from the systems:

- Xero
- Conta Azul
- Stripe
- Zoho CRM
- Clickup
- Github
- 360 Dialog
- MongoDB

Purpose and Objective

Ensure the right data is in the right place at the right time, to empower Rocketeers with data and propel the company to be more data-driven.

Guaranteeing the data quality and data governance across our platforms.

Infrastructure

The Data Lake is based in AWS, below the tools that we current use:

- AWS Lambda (for data treatment and data extraction)
- Cloud Watch (for scheduling the AWS Lambda execution)
- S3 (store all the raw data and treated data)
- Athena (query the data stored in S3)

Check in the Data Platform repository in Github to see the full documentation of the scripts. To a complete view of the current infrastructure you should check the Data Infrastructure flow.

How to use the Data Lake?

We've prepared a documentation of how to use the Data Lake, you can check this presentation here. Due to special needs for the Product Data we decided to create a different flow for the Product team, the full documentation you can find here.

For all the teams that have interest in use the Data Lake or to collect more data from different databases the Data & Analytics team offer the full support, feel free to get in touch with Alan Wright.

Technical Documentation

- How to create new tables in Athena? (WIP)
- How to import tables/databases from Athena in Zoho Analytics? (WIP)

Athena Naming Conventions

Databases

All the databases should be the same name as the source system, all the names should be in lowercase and separated by underscore.

Tables

All the tables should be the same name as the source module and be under the database which corresponds to your system, all the names should be in lowercase and separated by underscore.

Tables that tagged with a "**_s**" contains sensitive information hided.

Views

All the views should follow the template below:

vw_d_gg_product_stats

Red = all views should contain the prefix "**vw**";
Orange = indicates the the periodicity of the table (d = daily, w = weekly, m = monthly, y = yearly);
Purple = indicates the owner of this view, the owner should be identified by his initials (limited to 2 letters);
Green = subject of the view, and should indicate with kind of data we can find in this view.

Data as a Cross-Functional Team

The Data & Analytics Team is one of the most important teams in Rocket.Chat due to its strong cross-functional nature. In this document, you'll find how we act together with many other teams and departments to deliver value and apply data insights into our business strategies.

Sales & RevOps

Data and RevOps work closely together in visualizing sales performance, forecasting scenarios, churn rates, data modeling, etc. Further, RevOps functions as a bridge between Data and the Sales department.

Most common interactions between us:

- Creating and maintaining Dashboards, Charts, and Reports;
- Changes in CRM should be reflected in Analytics. Every now and then, RevOps changes fields, adds features, and comes up with new business logic in our CRM. It's our job to create, adapt and maintain reports based on that data;
- Providing specific visualizations and reports: Zoho has a feature called Query Tables, enabling us to create complex data modeling tables based on Sales Data;
- Providing Dashboards with usage data enabling sales cycle reductions.

Point of Contact: Leandro Coletti (Sales)

Finance

For a couple of months, the Data team was responsible for managing and updating the spreadsheet Consolidation 2, which consolidates (duh!) our financial data from Brazil and the United States. This spreadsheet will soon be replaced by a proper financial system.

We still get most of our KPIs from the spreadsheet, they are all located in the tabs Unit Economics, Unit SaaS, and Unit Self. It's still our responsibility to maintain these three tabs and come up with visualizations (available in a Data Studio report).

Point of Contact: Kaique Silva (to check for missing invoices) and Suely Morales

Marketing

Most of the work Data & is related to lead generation and campaign tracking. Our Marketing operations are migrating to HubSpot (May 2021), so we expect to work closely together with this department.

Main activities:

- Preparing data for our website via sheetsdb API;
- Tracking Leads generation on Zoho Analytics;
- Supporting metrics tracking related to UTM and campaign ROI;
- Coming up with specific visualizations and reports with Query Tables (1 and 2).

Point of Contact: Paola Palhais

Corporate Management

There are two main ways the Data Team works together with Corporate Management.

- Data provided extensive support to the visualization and tracking of OKRs framework in 2021 via ClickUp).
- Most importantly, we are the main players regarding company updates to investors (both monthly and quarterly reports).

Point of Contact: Alan Wright.

Product

We usually deliver ad-hoc requests from the Product Team. Most of the time, the data comes from our MongoDB database, containing info about usage data, feature adoption, engagement metrics, etc. The Team Collaboration and Omnichannel product managers, Renato Becker and Milton Rucks, fill in a data request template, and then we deliver data products on Zoho Analytics.

Examples of ad-hoc requests:

- Omnichannel feature usage by country, company size, and industry, Omnichannel adoption ratio, the average number of omnichannel agents per month, etc. Most of the analysis is done in the Omnichannel dashboard.
- Team Collaboration: servers by language (used to define which languages we were going to officially support), engagement metrics such as MAU/DAU/WAU,

Points of Contact: Renato Becker and Milton Rucks.

Community

Even though we started working with Community recently, we are a key team in measuring community health and growth. At the beginning of 2021, the Data Team developed a Composite Index to measure Community Size growth. Find more info about it here, and check this presentation for a tutorial on how to update it.

Overall, we continuously review the metrics tracked and come up with new ones, especially related to Push Notifications and Community Engagement (both on Open Server and on GitHub).

Point of Contact: Sing Li.

People Experience

The People Experience department uses Zoho People to manage employees and HR-related matters. That system is natively connected to Zoho Analytics and, because of that, many dashboards and reports were automatically created. At the beginning of 2021, we performed a major rework of all dashboards and charts to make sure the right business logic was being used.

Nowadays, our main job is to maintain the dashboards that currently exist, create new visualizations, and do minor adjustments to the existing charts.

Point of Contact: Ana Paula Lopes.

Data & Analytics Products

Below you will find the main products the Data team offers and their respective responsibilities.

Product Name	Technical Responsible	Business Responsible
Datalake	Gustavo Ciciliati	Alan Wright
Sales Forecasting	Gustavo Ciciliati	Paola Palhais
Lead Generation Dashboard	Gustavo Ciciliati	Diego Spagnol
Product Analytics Dashboard	Izabela Campos	Chris Skelly
ARR/Churn/Unit Economics Dashboard	Gustavo Ciciliati	Alan Wright
Customer Experience Dashboard	Gustavo Ciciliati	Alan Wright
Zoho Analytics	Gustavo Ciciliati	Alan Wright

If the product you need assistance in not on the list, please get in touch with Alan Wright.

Internal Communication Plan

Understand how to create a well-structured internal communication governance in Rocket.Chat

To increase synergy and organization in the intersection between the **Sales** and the **Engineering** teams, we have created a MVP of internal communication plan which was divided into: **cross-channels organization**, **organization of channels by department**, and a **comittees structure**.

Cross-channels organization

To be effective in defining the organization across channels, it is important to interview the stakeholders who are involved in the process. Understand your perspectives, needs, gaps and map them out. The second step is to define the channel objective, type of questions, stakeholders, the channel leader (a person or area) and SLA (if necessary)

Questions category

ROADMAP QUESTIONS

Type of questions: Roadmap, suggestions of new features, new features delivery forecast
Resposible - receive: Omnichannel - Renato Becker, Team Collaboration - Milton Rucks, Saas - Ricardo
Who can ask questions?: Every RC employee
Way to notify/ask - System: Product Suggestions - Zoho
Tracking: Quarterly Committees to share the product roadmap

VERY TECHNICAL QUESTIONS

Type of questions: Very technical questions about the product, implementation, code errors, etc
Resposible - receive: PMs need to coordinate and direct the question to the technical responsible
Who can ask questions?: Pre-sales team & CS
Way to notify/ask - System: Channel exclusive (PMs + Pre-Sales + Support leaders + Tech Leads)
Tracking: Extreme Technical Questions most of time don’t have a SLA. How to track the process?

PRODUCT BAD BEHAVIOR - CRITICAL SITUATIONS

Type of questions: Technical questions about RC bad behavior during customer calls, livechat, product demonstrations, etc
Resposible - receive: Technical Leads team
Who can ask questions?: Pre Sales team & CS
Way to notify/ask - System: Channel exclusive (Tech Leads + PM & CS)
Tracking: SLA support team - FCR (first contact resolution) - During Working hour (Product team)

PRODUCT BAD BEHAVIOR - NON-CRITICAL SITUATIONS

Type of questions: Technical questions about RC bad behavior during self navigation or non-critical situations
Resposible - receive: PMs
Who can ask questions?: Every RC employee
Way to notify/ask - System: Report Bugs - Forms
Tracking: How to track?

Organization of channels by department

From time to time, the structure of teams within Rocket.Chat needs to be revised. It is important to review the entire structure, understand the teams' needs and address them in the right channel.

We developed a channel structure for the sales team, based on the fact that the team is growing rapidly and some parts of the processes needed to be more visible to the team.

Creating channels with automated CRM messages can be a smart and quick way to bring more transparency to your sales force

Sales channels structure

SALES ALERTS

Content & Purpose: New Inbound leads in the platform - alert the sales team (easier way to notify the sales team about new inbound leads)
Responsible - Receive: The reps from the lead region
Who can ask questions?: Automated messages - no questions
Way to notify/ask - System: The whole Leandro Coletti team
Tracking: Not necessary

POTENTIAL SALES REVENUE

Content & Purpose: Customers who are in the last 2 weeks without contract signed, big acount Saas cancellations & PQL with more than X employees (reduce the contact time with the client)
Responsible - Receive: The reps responsible for those leads
Who can ask questions?: Automated messages - no questions
Way to notify/ask - System: The whole Leandro Coletti team + Bruno Weiblen + Pre Sales team + (Rodrigo/Gabriel) + RevOps team
Tracking: The rep responsible for that lead needs to comment with a status

WON DEALS

Content & Purpose: Closed deals
Responsible - Receive: Sales team
Who can ask questions?: Automated messages - no questions
Way to notify/ask - System: Sales Team & Leaders
Tracking: Not necessary

ROCKET.CHAT SALES

Content & Purpose: Announcements cross-department that has an impact in the Sales team
Responsible - Receive: Sales team
Who can ask questions?: Marketing, Sales Enablement, Partnership, PMs, Community leader & Technical writer
Way to notify/ask - System: The whole Bruno Weiblen team + PMs, Pre Sales, Community leader, Technical Writer
Tracking: The rep responsible for that lead needs to comment with a status

ROCKET.CHAT SALES TEAM

Content & Purpose: Internal Sales Announcements which do not directly impact other teams.
Responsible - Receive: The reps from the lead region
Who can ask questions?: Automated messages - no questions
Way to notify/ask - System: The whole Leandro Coletti team + Bruno Weiblen
Tracking: Not necessary

ROCKET.CHAT SALES LEADERS

Content & Purpose: Important announcements & alignment among sales leaders
Responsible - Receive: The region leaders
Who can ask questions?: VP, General Manager & Region Leaders
Way to notify/ask - System: Leandro Coletti team + Bruno Weiblen + other sales leaders
Tracking: Not necessary

SUPPORT-BACKROOM

Content & Purpose: Open or close critical client tickets (An extra support to clients tickets, putting more visibility in some critical cases)
Responsible - Receive: Support team
Who can ask questions?: Sales team, Pre Sales team, Other departments leaders
Way to notify/ask - System: Support team
Tracking: Not necessary

Committees structure

Understanding the types of communication is a good starting point for defining your organisation/department's committee structure. What kind of news / announcements can be part of a channel? What kind of information is better to be in a meeting than in a channel?

Channels are not the right place to share strategic announcements, they are the right place to support a strategic announcement made by the CEO in a company-wide meeting, for example.

https://docs.google.com/presentation/d/1MJ6nklqWo8u2dkzUuul0lPmT:XvBSqNvJnyyaPJbViU/edit#slide=id.ge347282e96:0:0

docs.google.com

Program Management

Purpose

To extend the mindset of generating new business to all departments of the organization. Responsible for tech stack within the revenue generating teams, focused on increasing efficiency through new tools and integrations between existing ones. We develop and maintain key processes, systems, tools, and reporting for corporate management.

Members and functions

- Marcelo Schmidt: Program Manager.
  - Responsible for building a team of tech operations and currently managing the tasks at hand.

Key Initiatives

Domain	
% of time	30%
Objective	To extend the mindset of generating new business to all departments of the organization.
Primary function	Create and optimize processes, define the hiring guidelines and provide tools, training and inputs to improve routines and performance of salespeople.
Secondary function	Periodically review the strategy and results of our current sales enablement process.
Areas of focus	• Sales Enablement (Open LMS)
Key results	• Achieve participation in training • Increase sales productivity • Decrease sales cycle

System & Tools

Domain	
% of time	30%
Objective	Responsible for tech stack within the revenue generating teams, focused on increasing efficiency through new tools and integrations between existing ones.
Primary function	Automate repetitive or tedious manual tasks.
Secondary function	Support our business intelligence team.
Areas of focus	• CRM • Connectivity / Integration w FC, Hubspot, etc.
Key results	• Decrease dependency to other teams in sales cycle • Decrease number of duplicates in CRM (or increase reliability) • Improve customer NPS/CES scores (it's a side effect of automating, reducing time to answer)

Corporate Management

Domain	

% of time	20%
Objective	Develop and maintain key processes, systems, tools, and reporting
Primary function	Create, manage and improve connection between areas, mapping the end-to-end process workflow.
Secondary function	Being an advisor and facilitator for the team to provide feedback and complaints.
Areas of focus	• Transitioning / support for Finance • Annual strategic and budget planning • Support for PEO / global corporate management function
Key results	• Achieve 100% of contracts recorded in Zoho Subscriptions • Increase number of feedbacks received on Officevibe

Culture

Domain	
% of time	20%
Objective	Develop and maintain key processes, systems, tools, and reporting
Primary function	Develop and put in practice culture programs such as Culture Month, Listening Day, Customer Day, Blend In and others.Secondary function
Secondary function	Develop bots for interacting with employees and gathering feedback and participation in culture initiatives.
Areas of focus	• Company Culture • Ops Team Performance / Cohesion
Key results	• Increase the number of developed culture initiatives from 1 to 5 • Increase eNPS • Increase customer NPS

Revenue Operations

Purpose

The RevOps team is located within the operations team and works cross-frontally with the other teams as Data, Business Systems, and GTM Planning.

Some responsibilities of the RevOps team can be summarized as follows:

- Sales force design and deployment
- Sales process and systems - processes management from Awareness to Expansion
- Pipeline management and forecasting
- Sales Operations management
- Sales compensation design and administration
- Quota allocating/goal setting
- Revenue metrics selection and definition

Members and functions

Member	Role	Focus
Diego Spagnol	Sales Ops Analyst	**Awareness/ Education Stage of funnel**. Ensure that the lead delivery flows and processes to the sales team are being delivered according to the SLA - Leads Check Routine
Isabelle Dias	Sales Ops Analyst	**Onboarding & Expansion stage of funnel.** Focused on Customer Onboarding & Support building the internal bridge to order management.
Mayra Lima	Legal Analyst	Focus on requirements and provisions in contracts to ensure compliance with all laws and regulations.
Paola Palhais	RevOps Manager	Team Management, project management and performance evaluation. Quota setting reviews, forecasting & compensation plan design.

Security

All consolidated information about our security team can be found in this section:

https://handbook.rocket.chat/company/security

🍺 People Experience

Becoming a Rocketeer brings the responsibility of practising our values every day, taking care of the company and our internal and external clients, and believing in and trusting our team and our purpose.

The content in this handbook will help you get immersed in the daily life and responsibilities of the Rocketeer. It is organized according to the steps of the journey you'll face being part of our team:

1. **Entering Rocket.Chat**
2. **The Daily Life**
3. **Developing Yourself**
4. **The Summit**

Take your time reading through and feel free to contact the People Experience team anytime for any questions or feedback!

Talent Acquisition

The Talent Acquisition Team in Rocket.Chat is responsible for bringing the best talents to our rocket by sourcing, attracting, interviewing potential candidates, and then hiring and onboarding the new rocketeers. Here's a full article in case you would like to learn more about what talent acquisition means.

External Recruitment

Learn about the process and platform of our recruitment.

Our recruitment process has essentially the following steps:

1. **Resume Analysis:** Focusing on analysing the description of the candidate's experiences, fit with the level of experience required, and necessary skills for the job.
2. **Phone Screening:** To focus on initial details that are indispensable for the candidate to hold.
3. **People Interview:** The purpose of this stage is to explore deeper, with a set of behavioural questions, the candidate's fit with our culture, and explain other details about the organization and position.
4. **Hiring Manager Interview:** This interview is conducted by the hiring manager, who will be the candidate's leader in Rocket.Chat if hired. The goal here is to determine whether or not the candidate would be a strong addition to the organization in terms of experience and skills, and if they would have a good fit with the area's team.
5. **Executive Interview:** The final step of the process is a conversation with the executive responsible for the area, the goal here is to find out what motivates the candidate, answer any questions the candidate may have and let them know what to expect once a Rocketeer.

Important Information

- Positions may also include a technical challenge after the People Interview.
- Occasionally, the Hiring Manager and Executive interviews are done together to keep the agility of the process.

All of these steps are managed through **Greenhouse,** our ATS, and where all involved interviewers, leaders and recruiters can collaborate during the selection process.

Internal Recruitment

Find in here the description of our process for internal position transfers!

If you're looking for a career change and you notice an open position of your interest, you can be part of the selection process for the role!

How It Works:

- [ ] You can talk directly with a member of the Talent Acquisition Team and reveal your interest.
- [ ] You must inform your current Manager so that they know of your desire to switch.
- [ ] We will forward your application to the Hiring Manager responsible for the available position and if you have the mandatory requirements (shared in the job description), we will schedule for you an interview with the Hiring Manager and the Talent Acquisition Team.
- [ ] If you are accepted for the new role, your Manager will be informed, and the People Team will have a conversation with you to tell you all the details you need. Every transition step after this will be conducted by our People Team.

Important Information:

- We understand that the minimum time for you to adapt and be fully onboarded into a role is 6 months, so we suggest that you have at least 6 months in the company/previous role to apply. *Exceptions will have to be evaluated.*

Internship Hiring or Renewal Process

General Steps For Hiring New Interns Or Contract Renewal

In Brazil, the hiring of interns tends to be very bureaucratic. The hiring model is governed by Internship Law No. 11.788, published in 2008, which establishes all the rules that must be followed:

- The maximum workload must be 20 hours or 30 hours a week
- The activities performed must mandatorily be related to the Intern's grade course
- The maximum duration of the contract is 2 years
- The company must provide a professional to supervise the activities performed by the Intern (usually the Hiring Manager)

Note: The Intern compensation package is standard for all according to the workload. To learn more about remuneration and benefits, contact the People Team.

Required Documents

Each University has its own template documentation that Rocket.Chat and the Intern need to fill in and forward it for signing. However, there is one document in particular that is common to all processes: the Internship Commitment Term — the ICT. The internship will only be formalized by the University's approval of this document.

To guarantee the hiring efficiency of Interns, it's important to establish the responsibilities of 3 parties:

1. **Intern**
2. **Manager**
3. **People Team**

Intern

The Intern is responsible for:

- [ ] Collecting all the documents required provided by your Internship Center
- [ ] Share the documents with the People Team in a folder on Shared Drive
- [ ] Communicate to the People Team the steps the University requires to firm the Internship
- [ ] Organize the working hours by aligning with the Direct Manager

Manager

The Manager is responsible for:

- [ ] Define the duration of the contract
- [ ] Define the workload
- [ ] Define the main tasks/activities to be carried out by the Intern
- [ ] Define how performance will be measured

People Team

The People Team is responsible for:

- [ ] Collect with the Intern all the documents necessary for filling
- [ ] Collect with the Manager all the information described under the session “Manager”.
- [ ] Fill in all the contracts and documents
- [ ] Forward all documents to internal signatures on Zoho Sign
- [ ] Be the liaison between the University and Rocket.Chat

Will all the documents in hand, the People Team must forward the final version of the ICT with all signatures to the Finance Team - patricia.ferreira@rocket.chat - to complete the admission or renewal process.

Onboarding

When onboarding the New Rocketeer, our main goal is to welcome and help this person with the understanding of daily basis activities, departments, and tools. The Onboarding Process is split between Company Onboarding and Departmental Onboarding. Inside each topic below you'll be able to find a description of both stages.

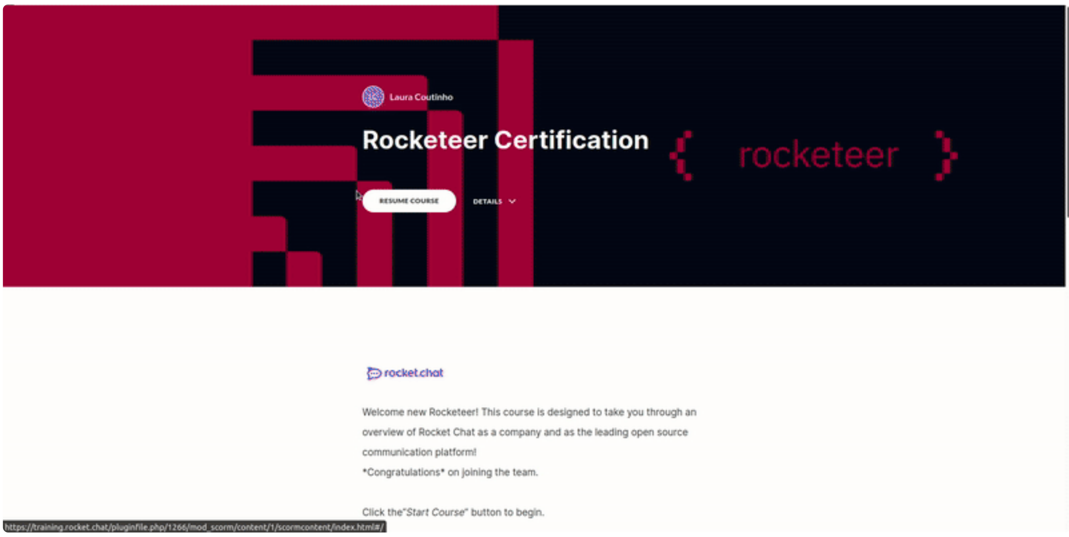
Here's additional material about practical details you'll need to know about before starting your journey as a Rocketeer:

Company Onboarding

The onboarding starts as soon as you accept our offer letter. Recurrently, from the day you sign the offer up to your first day with us, you'll receive instructions, additional documents, and other materials you need for joining Rocket.Chat. A few days before your start date, you'll also receive some directions along with your RC and Google Workspace credentials. Here´s a guide made for our New Rocketeers so they know what to expect.

The Onboarding Certification

The certification will give you a good foundation of knowledge about the company, our departments, the platforms we use, and more! So it's **essential** that you dedicate your first two days to completing the course at your own pace.



After completing the Certification, you will be able to:

1. Understand Rocket.Chat, from both the product and business points of view
2. Get resources to identify teams and departmental representatives that are there to help you
3. Find out more about the aspects of your daily life as a Rocketeer
4. Review the tools and systems you will use on a daily basis

During your first day, you'll have an Onboarding Meeting with the People Team for a welcome session. Also, you'll have checkpoint meetings on your 1st, 3rd, and 6th months. The purpose of these checkpoints is to understand, from the new Rocketeer's point of view, how the first weeks were, and how the adaptation is going. It's a safe space for the Rocketeer to share his thoughts, kudos, and improvement suggestions.

Open Source Townhall & CEO Onboarding

If you're a new Rocketeer, it's beneficial that you don't miss our Townhall Meeting!

The Open Source Townhall & CEO Onboarding is for every new Rocketeer who wants to:

1. Understand more about our open-source background and how it affects our culture code
2. Get to know our CEO and our CppO, and ask them a few questions in a Q&A session.

This meeting is scheduled for all New Rocketeers, usually at the end of the first month with us.

Departmental Onboarding

The process of departmental onboarding to be described in this section was developed with the help of our Rocketeers after surveys and workshops were conducted to receive their inputs on an **ideal standard onboarding** to enter an area.

Other teams might have onboardings with additional routines or items, but the process described here is what is considered the minimum expected from any area-specific onboarding. Furthermore, **every person has their own perspective and pace**. So, there is nothing better than communicating where are you at - either with your direct Manager or with the People Team.

Initial Guidelines

For starters, it's important to establish three basic guidelines about the area onboarding to achieve a smooth process that doesn't overwhelm its participant:

- Mix types of content in support documents - only long videos or long texts aren't the ideals
- Learning hands-on! Start with small activities, and slowly evolve
- Slowly expand the “world” of knowledge the person is having contact with to avoid being overwhelmed

General Structure

To guarantee that the new team member feels supported without depending only on a manager or one team member, it's important to create the structure of 3 support lines:

1. Manager
2. Buddy
3. Documentation

Each of these three will play different parts during each step of the onboarding. Let's walk through them and understand the different roles.

1. Manager

The Manager is responsible for:

- Notifying the team on its main channel (*onboarding date, name, and role*)
- Assigning a Buddy from the team for the new Rocketeer, and define the responsibilities towards the new team member
- Scheduling a **welcome meeting for introductions** on the **New Rocketeer's first day**

It's pre-aligned that the initial focus for new Rocketeers during the first 2 days should be going through the company onboarding, and as soon as they're done with it they're ready to get started in their departmental onboarding. Thus, the Manager should align with the new hire the date for the **kick-off meeting for the departmental onboarding** (**suggested to be on the 3rd day**).

When in the kick-off meeting with the new team member, you (Manager), and the assigned buddy, may cover:

- General details about the department, the team, the area's OKRs, initiatives, and other suggested topics to discuss are:
  - Overview of the product
  - Who are the area's main stakeholders
  - Current priorities of the area (big issues, responsibilities, etc)
- Align role and short-term expectations
- Introduce the buddy to the new member
- **Present the tools and systems that are used in the department so the new rocketeer can request access by following** this procedure.

Here´s a leader's checklist to not miss a thing!

Optional: Use the Jira project to coordinate your tasks and deadlines along the process to remind both yourself and the new member of the onboarding tasks to be completed during the first month. You can use it to create new tasks to help the person walk through documentation or repositories in an organized way.

2. Buddy

The buddy should:

- Use the kick-off meeting to introduce themselves
- Help the New Rocketeer adjust to the team, its ceremonies, and meetings
- Be present especially during their first two weeks to support them with tools, processes, and guidance - *Remember it's not only understanding the tool itself but also how the area organizes and uses it daily*
- Be available for any questions or doubts

3. Documentation

The documentation should:

The area should create documentation both for processes and tools, especially those that everyone in the area will have contact with. Having this in place brings back the initial guideline about mixing types of content, allowing the Rocketeer to also learn by going through the area's practices described in the internal handbook whenever necessary, optimizing the time spent by the manager and/or buddy.

Platforms and Systems

Daily, we use different platforms and systems. Here you'll find a list of them and what we use them for. A few days before your start date, you'll receive access and invites to all of them.

- ****open.rocket.chat**: It is the open-source server of Rocket.Chat, where our company channels are, and where the magic happens!
- ****Jira**: This's the platform our team uses for tasks, OKRs, and projects, seeing their level of priority, due date, and all necessary info.
- ****Officevibe**: This platform informs us about our organizational climate. It sends a weekly survey to everyone’s email with different topics such as feedback, recognition, and happiness. Through these answers we can know how our team is feeling, it generates our eNPS and more numbers we can use to know where to act! So you must take 5 minutes every week to answer these polls.
- ****Github**: The platform where our open source code is available, where collaborative coding happens.
- ****The Org**: The Org is an employer branding and org chart platform that helps new employees to get to know the company's team structure.
- ****Google Workspace**: You'll find access to your RC email, calendar, and shared drives with important materials.
- ****Zoho**: You'll find apps for almost any area and activity, such as:
  - **People**: In People, you see the people database, vacation requests, applications for PTOs, 1:1s, and remote benefit request forms.
  - **Vault**: If you ever want to share any passwords with anyone you don't have to use the chat, you should/must use Vault!
  - **Sign**: It is Zoho's digital signature tool.
  - **Desk**: It is where the support tickets are stored.
  - **CRM**: It’s where we have the company's sales information.
  - **Campaigns**: Also for creating campaigns.

Different areas or teams also use other specific platforms, and you will slowly get familiar with all of those too! Note that access to specific area platforms must be requested by following this procedure.

Monthly Payment

CLT Rocketeers

When you first joined you answered a form asking you if you already had a Santander account because you will need an account in that bank to receive the monthly payment. If you don't have one, you can try opening one online at this link. You should choose the "Conta Confia" category, for which you won't pay an annuity.

In case you're not able to create it through this page, just let the Personnel Department know and they'll create a letter to be sent to the bank in order for you to create the **salary account.**

In case you're not able to create it through that link, just let the Finance Team know and they'll create a letter for you to be sent to the bank in order for you to create the salary account. Once you have the letter, you can go to the bank and ask them to open a salary account ("Conta Confia" category).

After creating the account you can request for **portability** to the account and bank you use today, meaning any money that gets to your salary account immediately goes to the one you choose.

The payment gets to you in the last day of each month. It's important to point out that we don't do an advance of the salary in the middle of month (e.g. paying in the 15th and in the 30th).

US Employee Rocketeers

Your payment is done through TriNet. You don't have to create invoices, the platform will take care of all the processing for you. In TriNet the payment is done every 15 days, so half and half of your monthly salary is sent each time.

Contractor Rocketeers

If you are a contractor, your payment is done through Deel!

Firstly, what is Deel? - Deel reimagines payouts for businesses working with remote teams internationally. Deel helps you get paid anywhere you are, easy and fast with the most optimized rates.

Why do I need to provide my passport or government issued ID? - This is a standard operating procedure and ensures we know who we're working with and remaining compliant.

Additional fees may occur in the case of countries where local bank transfer isn't possible.

We'll send you an invitation to join Deel, when you receive it:

1. Please complete your profile by adding all information.
2. Add all your compliance documents.
3. Fill out necessary tax forms and sign the agreement.
4. Go through your verification process.
5. Enter your preferred payment method.

Through there you'll receive your paycheck once a month on the last day of the month!

That's it! You should be all set!

Our Benefits

In here you'll find every benefit Rocket.Chat offers!

Wherever you are our goal is to make your routine as a Rocketeer feel enjoyable, exciting and comfortable, so if you are remote or working from our office in Porto Alegre you'll receive a set of benefits to improve your work experience!

All Rocketeers receive the following benefits since the 1st Day:

- Unlimited PTO
- Company Laptop and Headphone
- Remote Benefit
- Italki
- Courses and Books
- Stock Options

We are constantly looking for new possibilities, and trying to bring a better set of benefits to our Rocketeers, so any suggestions or feedback can be directed to the People Experience team, who will be glad to receive them!

If you're in Brazil

Because of Brazil's legislation for workers, our Brazilian Rocketeers also receive the following:

- Meal voucher of R$30/day.
- Transportation card (for those in the Porto Alegre region)
- Gympass
- Healthcare plan (with dental)

You can have access to a full explanation about the CLT benefits like the types of plans, values received and the dates that you receive them by accessing http://bit.ly/BR-benefits.

If you're in the US

Besides processing payroll, through TriNet you'll also be able to opt for a healthcare plan. For each plan there is a part that is the company's contribution and another that is the responsibility of the employee, you can choose the plan you prefer, but the values will vary according to the plan and if you have dependents. You will have access to pricing details of each plan and will choose when you're completing your register in TriNet, but you can see an overview of your options below:

Medical: 243 plan options for employee, employee + spouse, employee + children or employee + family; Carriers: Kaiser CO, Kaiser GA, Tufts Freedom, Kaiser WA, Kaiser MD, UHC HI, Kaiser HI, Tufts, Blue Shield of CA, Kaiser, Aetna

- Employee only: 100% up to $660
- Employee + Spouse: 50% up to $990
- Employee + Children: 50% up to $880
- Family: 50% up to $1,430

Dental: 35 plan options for employee, employee + spouse, employee + children or employee + family; Carriers: Delta, Guardian, Metlife, Aetna;

- Employee: 100% up to $37
- Spouse: 50% up to $58
- Children: 50% up to $58
- Family: 50% up to $78

Vision: 14 plan options for employee, employee + spouse, employee + children or employee + family; Carriers: EyeMed, VSP

- Employee: 100% up to $5
- Spouse: 50% up to $7
- Children: 50% up to $7
- Family: 50% up to $9

Life Insurance: $20,000 Basic Life & AD&D

Disability: STD & LTD Employee Paid

Stock Options

At Rocket.Chat the stock options are intended to commit our team members to get us all together as official owners to a successful IPO. We want to motivate and reward our people for reaching that goal. This guide is meant to help you understand the piece of Rocket.Chat that you're going to own!

Its goal is to explain what it is and its importance in simple words, but if you want more details of terms and conditions we advise you to check the full Rocket.Chat Holdings, Ltd. 2016 Share Plan (the "2016 Share Plan") and your stock option agreement, both go into the full legal details. If you have any questions about navigating your stock options and before you make important decisions please count on our Operations team and/or consult an employment attorney or a tax advisor.

What is a Stock Option

A stock option gives you the option to later buy Rocket.Chat stock at the price stipulated at the time of grant. For example, if you are granted stock options with an exercise price of $1 per share of common stock today, and if Rocket.Chat grows later so its common stock is worth $20 per share, you will still be able to buy the common stock for $1 per share!

But then you may think, why not just give straight stock? There are actually two reasons for that: First is that you don't need to spend any money to purchase the stock at the date of grant and can decide to purchase the stock later as your options allow you to. Second, if we granted you $10,000 worth of Rocket.Chat stock today, you would have to pay taxes on the value of the stock (potentially a lot) for this tax year. But if we give you options for $10,000 worth of stock, you generally don't have to pay any taxes until you exercise them. (Remember this is a general summary of the tax treatment of your options and you should consult a tax advisor before taking any actions in the future which could trigger tax liabilities.)

In Rocket.Chat we give equity grants in the form of Incentive Stock Options (ISOs) and Non-Qualified Stock Options (NSOs). The difference in these two types are that ISOs are issued to US employees and carry a special form of tax treatment recognized by the US Internal Revenue Service and NSOs are granted to contractors and non-US employees. We also use Carta to administer our stock option program. You can find all of the terms and conditions of the stock program as well as your specific grant within Carta.

For your stock options to be meaningful three things must happen:

- You must vest the stock (1 year cliff plus 3 years of vesting after).
- You must stay until we have a liquidation event (and in case we have an IPO the lock-up period passes) or you have the cash to exercise your stock after termination.
- We must make the company worth more than the liquidation preference.

Now let's go over what these mean!

Vesting the Stock

This means that you have to remain employed by, or are a service provider to, Rocket.Chat for a certain period of time before you can fully own the stock under your stock option, meaning that you get to own the stock under your stock option in increments over time and this process is called vesting! Different companies offer vesting schedules of different lengths, around here the standard is a four year vesting schedule, so you would own a quarter of your stock after 12 months, half of your stock after two years, and all of it after 4 years. Vesting happens on a monthly basis, but there's something called a cliff.

The Cliff

A cliff is a period at the beginning of the vesting period where it doesn't happen monthly, but instead vests at the end of the cliff. At most companies, including us, this cliff period is generally one year. This means that if you leave your job - either voluntarily or involuntarily - before you've worked for a year, the options won't be able to be vested. But at the end of that year, you'll vest the entire year's worth (12 months) all at once.

The Exercise Window

Until the post IPO lockup period has expired (or we are bought) company stock is not liquid! So if your employment ends for whatever reason, you have a 90 day window to exercise your options. During this window you have to pay for the exercise price and in some cases the tax on the gain in value of your stock options, which could be considerable. If the company stock is not liquid this money might be hard to come by, so we may consider exercise window extensions, but only on a case by case basis. An example of a situation we'll consider is a valued team member quitting because of personal circumstances. However, in most cases there will be no extension.

How to Exercise my Options

Options are approved by the Board of Directors at regularly scheduled quarterly board meetings. After your grant has been approved by the Board you will receive a grant notice by email from Carta containing all information about the grant such as the number of shares, exercise price, vesting period and other key terms. When you are ready to exercise your vested options, these will be the steps:

1. Contact Rocket.Chat's COO and complete a "Notice of Share Option Exercise (Installment Excercise)" that he'll send you, sign it and return as PDF.
2. Send payment in US dollars by wire transfer. You will be provided wire info.
3. For US residents: You'll also need to file out an "83-b election form" that will be provided and file with the US Internal Revenue Service (IRS) within 30 days of exercise. Send a copy of the election form to the COO. You will most likely want to include the following letter when sending in the 83-b election to the IRS.

«Date Filed»

Department of the Treasury

«Address provided from 83-b instructions»

To whom it may concern:

Please find enclosed two copies of the 83-b election in connection with my purchase of shares of Rocket.Chat Holdings LTD common stock. Please return one copy stamped as received to my attention in the enclosed self addressed stamped envelope.

Yours Truly,

//signature

Remember this was a quick walkthrough on Stock Options, and for more information about dilution, option expiration, exercise prices and 409A Valuations, and taxes, please check this link (for a view with simpler terms), the full Rocket.Chat Holdings, Ltd. 2016 Share Plan (the "2016 Share Plan") or your stock option agreement (both for the full legal terms)!

Remote Benefit

Being a remote team and an international company comes with many things that are non-traditional, things like getting people on remote all-team meetings. It also brings along several aspects that are quite unique to the business side, such as different ways of paying employees, perks, benefits and when to give people holidays.

One reason our benefits structure operates differently is because we are remote and international, however, another reason is that we want our benefits to reflect our values and our desire to create a workplace of the future. So here we present a proposal of benefits to be offered to our team hoping to achieve this goal.

The Amounts

We’ve budgeted an amount to reimburse teammates for special costs. Market rates may vary as we have people based in different countries. We also have a great challenge to equalize the remote benefit, so keep in mind it will vary per region. For people relocating or moving to other countries, the Remote Benefit amount will be updated only after the update of the new address respectively in Deel and Zoho People.

Region	Monthly Amount
Brazil (including office boundaries)	BRL 200
USA and Canada	USD 150
European Union	EUR 150
Other countries	USD 100

Expensing

This policy is effective **October 1st, 2022**. The remote benefit **will be paid monthly**, and teammates can spend it as they see fit, without the need to present receipts. Below you can see how the remote benefit will be paid for each type of employee.

- **Employees and interns** based in **Brazil**
    - The amount for the Remote Benefit will be paid **monthly** in your **Caju card**. This amount will be allocated in the "Home Office" category, and can only be used in places that are included in this type of classification (for on prem or online purchases).
    - The amount accumulated **will not expire**.
- **Employees** based in the **US** and **Contractors** in **other Countries**
    - The amount for the Remote Benefit will be paid **monthly** along with your **salary**, **categorized as a Remote Benefit Reimbursement**.

Transition Period

For those who still have some **Remote Benefit balance remaining in Zoho**, the balance will be **available for use until December 31st, 2022** (under the *previous policy for reimbursement*).

During this transition period, we wil allow for employees to request reimbursements for bills and purchases (such as energy and internet bills) made **up to six months before the request**.

Getting Your Company Equipment

How to get your company laptop when joining Rocket.Chat (Updated on September, 2021)

Employees Located in Brazil and US

The following instructions for ordering your laptop and headphones ordering apply to all Employees located in Brazil and US.

Employees Located in Brazil

For Brazilian Rocketeers, **Rocket.Chat will buy the equipment and will send it to you** through mail delivery as soon as we start your admission process. You may receive the laptop and headphones separately.

When you receive the packages, you also have to complete the "After the Delivery" steps described below!

Important: Interns are not elligible to receiving company equipment, unless it is previously authorized by their manager. Once they receive the equipment, they also have to complete the steps described below.

Employees Located in US

The process follows the same line as the one done for Contractors, Rocket.Chat will pay a **one-time subsidy** for ensuring adequate equipment to provide the related hired service.

Following the definitions available in the Monthly payment policy, the subsidy will be **paid on the second quarter of the first month of work in a single payment of up to USD 2,150.00** (two thousand and one hundred and fifty dollars), which considers the Company's estimates for the purchase of a new notebook and headphones for remote work to be used for a period of **36 months**.

The equipment (notebook and headphones) purchased **belongs to the company**, and the Employee also agrees with the following rules of use of the equipment for the purpose of rendering services in accordance with the Company standards:

- The equipment is intended for work purposes only;
- Rocket.Chat has the right to unilaterally determine acceptable uses for the equipment, including mandating certain security configurations;
- Rocket.Chat reserves the right to change acceptable uses and security policies during the terms of this service agreement;
- Employees must agree with Rocket.Chat privacy policy and apply the necessary procedures as determined in the “Rocket.Chat Handbook”;
- Equipment bought must be new, not used, to guarantee standards and security policies.

You don't need to send any quotes for approval before the purchase, you just need to send the purchase receipt (with a value up to USD 2150) to the Finance team (patricia.ferreira@rocket.chat) so they can proceed with the reimbursement.

For the **laptop** you can follow the **specifications** below:

- *Non-devs:* Core i5 9th or 10th generation, 8GB or 16GB RAM, 256 GB SSD
- *Devs:* Core i7 9th or 10th generation, 16GB RAM, 256 SSD (preference to dedicated video card)

Find the terms for any necessary repairs to the machine below.

Exceptions to this policy will be solely at Rocket.Chat discretion.

After the Delivery - Applicable to Both US and Brazil Employees

As soon as you receive your equipment, you need to follow two crucial steps before starting to work:

1. The laptop and headphones need to be reported with serial numbers, brand, model and other details by adding it to this form.
2. New laptops should be configured with security in mind, so before you start working, you need to read and fill this security form that will guide you through the necessary configurations you need to do.

Property

The equipment paid for by the company is the property of Rocket.Chat, so you do not need to buy insurance for them unless it is company policy to do so, which at the moment it is not. However, you do need to report any loss following or damage to the Program Manager (Marcelo Schmidt) as soon as it occurs.

In case you eventually leave the company, there is a “Buy Back Policy”, which will be described further.

However, if you decide not to purchase the equipment, we will then have them shipped to our office and expense the shipping costs.

All the information in the team-member laptops must be securely erased before they are returned. This not only protects the company but also protects you since personal information may exist in these machines. Reformatting a computer is not sufficient in these cases because it is possible to recover sensitive data after reinstalling an operating system.

Buy Back Policy

You can buy back your existing equipment, either when it gets replaced with a new one, or when you're offboarding. In these cases, you have the option to purchase it for the residual value from Rocket.Chat.

The residual value is calculated using the Straight-Line Depreciation method, as described in your Agreement to Use Company Assets, which you'll receive once your purchase is approved.

The Finance team will e-mail you asking if you would like to send back or purchase your equipment. If purchasing, please contact Débora Coy and we will calculate the determined value. Then, if you decide to move forward with purchasing, our Finance team will reach out with payment information.

If you decide to retain the laptop, you are required to wipe the machine and re-install the base operating system, and remove any and all software and configurations that were supplied by Rocket.Chat. Evidence or a declaration that the device has been wiped must be supplied within 2 weeks of the end of employment. If we discover that a device has not been wiped according to policy, we may act to enforce a remote wipe without notice.

Repairs

If you need to replace a battery or something small that does not affect the productivity or speed of the device, please go ahead and get that small item replaced and expensed, by using this form. If the repair is going to take longer than a day, then you need to make sure you have a backup laptop to work on.

If, however, the repair is going to be expensive and take weeks to fix and you have no backup laptop, your best option is to replace the laptop. In this case, in case you need a replacement laptop, make sure to send evidence that the previous machine's damage, return the first laptop by shipping it to our office (your shipping costs will be reimbursed) and remember all laptops must be returned within 2 weeks of receiving the replacement, so please prioritize transferring information between laptops within this time frame.

Contractors

The following instructions for ordering your laptop and headphones ordering apply to all Contractors hired after September 1, 2021.

Laptop and Headphone - Applicable to all Contractors hired *after* September 1, 2021

As part of the Independent Contractor's agreement, the Company will pay a **one-time subsidy** for ensuring adequate equipment to provide the related hired service.

The subsidy amount will be **paid on the first day of the beginning of the services in a single payment of up to USD 2,150.00** (two thousand and one hundred and fifty dollars), which considers the Company's estimates for the purchase of a new notebook and headphones for remote work to be used for a period of **36 months**.

The equipment (notebook and headphones) purchased **belongs to the Contractor**, who is solely responsible for its careful use and maintenance (no repairs refund are applicable).

You don't need to send any quotes for approval prior to the purchase, you just need to send the purchase receipt (with a value up to USD 2150) to the Finance team (patricia.ferreira@rocket.chat) so they can proceed with the reimbursement.

Contractor also agrees with the following rules of use of the equipment for the purpose of rendering services in accordance with the Company standards:

- The equipment is intended for work purposes only;
- Rocket.Chat has the right to unilaterally determine acceptable uses for the equipment, including mandating certain security configurations;
- Rocket.Chat reserves the right to change acceptable uses and security policies during the terms of this service agreement;
- Contractor must agree with Rocket.Chat privacy policy and apply the necessary procedures as determined in the “Rocket.Chat Handbook”;
- The Contractor is fully liable for loss or any damage in the equipment; and
- Equipment bought must be new, not used, in order to guarantee standards and security policies.

For the **laptop** you can follow the **specifications** below:

- *Non-devs:* Core i5 9th or 10th generation, 8GB or 16GB RAM, 256 GB SSD
- *Devs:* Core i7 9th or 10th generation, 16GB RAM, 256 SSD (preference to dedicated video card)

In the event of an accidental loss or serious damage to your equipment that might interrupt your work for a long period, please contact the Department Head of the area to which you provide services, in order to analyse the situation and impacts.

Exceptions to this policy will be solely at Rocket.Chat discretion.

This policy is effective for all Contractors whose work contract starts *after* September 1, 2021. Prior agreements before this date still remain as previously agreed.

Before beginning your work- Applicable to all Contractors hired *after* September 1, 2021

As soon as you receive your equipment, you need to follow this crucial step before starting to work:

- New laptops should be configured with security in mind. So before you start working, you need to read and fill this security form, that will guide you through the necessary configurations you need to do.

Termination of the Agreement - Applicable to all Contractors hired *after* September 1, 2021

In the event your service agreement is terminated before a period of 36 (thirty six) months, either by the Contractor or the Company in any circumstances, the proportional amount lasting to complete 36 months should be refunded by the Contractor to the company, and will be discounted from the last payment of the agreement by the Company.

When the Agreement terminates, you are required to wipe the machine and re-install the base operating system, and remove any and all software and configurations that were supplied by Rocket.Chat. Evidence or a declaration that the device has been wiped must be provided within 2 weeks of the end of the termination/end of contract. If we discover that a device has not been wiped according to policy, we may act to enforce a remote wipe without notice.

Getting The Email Signature

Here is the step-by-step on how to get the Rocket.Chat email signature for your Rocket.Chat email account:

- Download the HTML template signature directly from Github
- Open the HTML file you downloaded with your browser and copy it.
- Paste the template in the signature settings of your email.
- Change the texts with your info (don't forget to change both, text displays and links).
- Send a test email to a teammate to confirm that your signature appears correctly.

If you never installed a HTML email signature in Gmail you can check this video to get some additional help!

Daily life

Find out what are the processes you will encounter during your daily life as a Rocketeer!

In this section you'll find out more about:

- 1:1s
- PTO Policy
- Vacations Policy

Feedback

Do you know the difference between a Check-in feedback session and regular feedback?

Regular feedback is punctual and must be given to the Rocketeer as soon as possible to share a situation or behaviour you have observed. This is an opportunity you give another Rocketeer to create awareness about a possible improvement, and it is also a way to live by our DOTS - being transparent, owning the responsibility, sharing your thoughts, and trusting your colleagues.

Meanwhile, the Check-in feedback session happens twice a year and it is the specific moment of the performance review cycle when the managers get together with their team members to give feedback (regarding the past 6 months), talk about careers, align expectations and define the goals for the next semester.

What is daily feedback?

Given very close to when the situation or the behaviour was observed, on the same day or on the next 1:1 session.

Attention! Be careful to have the right context and the right timing. You should avoid saying anything when you feel the receiver is not open to listening to it (in a bad mood, upset, nervous, overreacting, or angry).

Can be corrective - related to something the Rocketeer needs to improve or change (in behaviour, activities, processes, or results) - or positive, when you want to highlight a behaviour or a result you would like to see more often in Rocket.Chat.

How to give good daily feedback?

First, prepare what you will say, have some examples, and make sure you are in an appropriate environment. The five steps below will also help you:

1. **Context:** Provide context and explain how the situation took place;
2. **Facts:** Share what you observed and be specific about it, you should not be personal. Example: Your team member lost a deadline. Don't say they're disorganized, instead state the fact: "We had this important project to deliver yesterday and I haven't heard anything about it yet."
3. **Impact:** Describe how you feel or the consequences of the action;
4. **Discussion:** Check if the person understood you well and encourage them to share their version of the fact;
5. **Action:** Suggest specific and alternative behaviour and decide together what actions should be taken to avoid happening again.

Don't Forget:

Be well-intended - the motivation for giving feedback is trusting in the improvement of the receiver, believing in what you are saying and believing it will contribute to the person who is receiving it.

Be straight to the point - your message should be crystal clear. Being straight to the point doesn't mean being rude or aggressive, means being transparent and direct. Be careful with the tone of voice and the way you convey the message.

Do not be personal - focus on behaviour, not people.

Choose the right timing - It must be given in private.

We come from different cultures - Meaning we convey and receive feedback differently, but the effort of being mindful of how we're communicating should be done by both the speaker and the listener! To learn more about this essential topic for global teams, check out the book "The Culture Map" by Erin Meyer.

If the receiver doesn't agree with the feedback or overreacts, ask them to think about it and mature what was said. You can schedule a second meeting, after giving time for them to think, reflect and get their own conclusions.

To learn more about daily feedback check out "Radical candour" from Kim Scott, an excellent match to our DOTS!

Check-In Feedback Session

On the other hand, the Check-in Feedback Session happens every 6 months after the Review stage of the Check-in process.

If you are a manager and want to know more about how to plan this session you can click here to access a complete guide.

If you'll receive the feedback you should also prepare yourself by keeping these tips in mind:

1. Listen carefully
2. Wait until the other person is finished to say something or to ask for more details
3. If the feedback is not crystal clear to you, ask for examples
4. Discuss your career, expectations, and development! Sharing these points with your manager is essential to create alignment and to help you get guidance to achieve your goals.
5. If you have feedback for your manager, this is a good opportunity.

1:1s

What are they and how to do one?

The 1:1s, or 1-on-1s, recurring meetings between leaders and their teams, where the collaborator has the space to align priorities with the leader, give feedback, express concerns and discuss expectations.

It is the channel for you to define the priority tasks for the week but also to express how you are feeling about your work and activities, and to be mentored by your leader on how to improve your skills and on how to achieve your career goals. They also are points of contact you'll have to talk about the objectives set during the Performance and Career Check-in.

The frequency of the 1:1s vary, but keep in mind that you can and you should remind your leaders about them!

These meetings are yours, Rocketeer! So here are some important points that will help you have greats 1-on-1s:

- **Organize your topics**: Know what you want to mention, align the expectations about your goals for the week and quarter, discuss your career and development, bring up decisions you can't make alone, let them know about a PTO you want to take.
- **Have a fixed date**: Don't leave this schedule up to fate! Establish that your meeting will happen every Tuesday at 10AM and don't break it. Consider that a fixed slot in your agenda. That way all goals and tasks set on previous talks have clear due dates.
- **You may want to take notes**: Although it isn't mandatory, sometimes you may need to write down the agreements made or what was postponed to be talked about later, for example.

Guide to PTO

Rocket.Chat highly encourages everyone to take some Paid Time Off (PTO) whenever you need it, be it for visiting somewhere new or just taking some time for yourself. Knowing when to rest, stop, and take some time away for yourself or to spend with your loved ones, is an essential part of maintaining a healthy work/life balance.

What are the possible reasons to take a PTO?

There are many of them! You can read PTO as "time for yourself" so:

- Taking a trip
- Celebrating family and friends' birthdays
- Personal reasons you don't want to disclose
- Mental health moments
- Doctor appointments
- Off-time to take care of yourself
- Sleeping after a tiring night (like after an important release)
- Chasing hobbies (play piano, learn a language, painting, cooking something)
- Taking your pet to the vet
- Camping
- Maintenance on your computer/internet/something broke down and you need to fix it
- Movie day with family/friends
- RPG day with friends
- Taking a long walk, enjoying nature
- Going to the mall/park
- Doing exercises
- Your birthday (This gives you an automatic PTO for you to celebrate with your loved ones!)

We can’t always plan on our PTOs (if for instance there was an accident), but it’s always good to plan ahead if possible!

If you need to deal with something personal tomorrow, but you know that that will be time consuming, exhausting, and you will need a lot of effort to fulfill that task, you could already ask for a PTO. Also, end of quarters are usually stressful with new releases and closing of quarter for the sales team for example. So, why not take some days off afterwards? Having that defined it's time for the next steps.

If you want a guideline of number of days we advise you to take you can think of 40 days in a year. This number considers vacations and doesn't count sick days, so they can be used for traveling or just taking some time for yourself and looking out for your mental health.�

Then what do I need to do if I want to take a PTO?

First, think about why you're taking the PTO. Is it going to take half a day? Is it a trip somewhere and it will probably be 4 days long (the maximum for PTO)? Make sure you have that cleared on your mind and do step 1:

1- Tell your leader about it.

Something about 5 days before the PTO date would be excellent for longer periods of PTO - such as 4 days -, to have time to plan who will take care of your possible tasks during the time off. But, for smaller periods of PTO, two days or one day before would be sufficient. **Then,** it's time for step 2, which you may already imagine:

2- Ask for it on Zoho People.

The only exception here is your birthday, for which you don't have to ask for the PTO on Zoho, since all Rocketeer birthdays are considered automatic PTOs. **If you have a doctor's note / sick leave certificate, please add it in the attachment field in the leave request forms.**

After that comes the final and really important step:

3- Plan ahead!

What are the tasks or people that might depend on you during that time? Can you leave the necessary emails already scheduled? Or leave a peer accountable for that while you're gone? Think about these **very important** details, this way you'll be able to leave without feeling the pressure of having to check-in every other hour.

But what do I do if I need an emergency PTO I didn't see coming?

It's okay! If an unexpected emergency occurs please contact your manager by any means possible and as soon as possible if you will be unavailable or unable to work. This will allow your manager to confirm your safety and reassign any critical work during your absence.

If this situation will probably last for more than just one day, request the following days off on Zoho People like the usual. If you're also unable to do that, just ask someone from the People team and they'll include that PTO on the system for you.

Are there any other hacks and tips I can use when taking a PTO?

YES, THERE ARE! Here are some alternatives you can use to let people know you're off and that will help you leave on your PTO peacefully and with no worries.

1. **The `/out-of-office` Rocket.Chat app**: You'll also hear about this one in the Holidays and Vacations page, but whenever you're off you can activate this app that creates an automatic message on your dm chat to let your coworkers know about it if they try to message you. You can activate it by sending this in any chat on open: `/out-of-office out <automatic message you'll leave>` And when you come back just write: `/out-of-office in`.
2. **Google Calendar out of office**: After the PTO has been approved, update your own calendar using Google's "out of office" feature and include the dates you plan to be away in your automated response. Note that this feature will automatically decline any meeting invitations during the time frame you select.
3. **Turn off push notifications**: For some of us push notifications and rest don't really go will together because it's natural that when we see a message we'll want to help and that will cause us to worry during our time off. If you want to respond during your PTO it's okay, that is your choice! But if you want to fully have those days for yourself you can feel free to turn off the app notifications on your phone.

What to do and what not to do regarding PTO?

- What to do

1. At Rocket.Chat, we strongly encourage taking PTOs. Making sure you are not overloaded, taking enough time to rest and taking care of yourself is an important part of having a healthy relationship with your work and achieving a work-life balance. So the first “to do” is feeling free to take PTOs!
2. A good way to show the wonderful aspects of PTO is to share! So use our #good-vibes channel to share what made you feel happy and well during your PTO! Went camping? Show us some pictures of nature, trees, a fire crackling! Just took half a day off to cook bread and watch soap operas? We would love to see freshly cooked bread and some soap opera recommendations!
3. When you see a colleague is on PTO, instead of sending messages on Rocket.Chat during their time off, schedule them by using the ** `/sendlater` **app! Also, everyone has the **`/offmessage`** app automatically enabled in our team, it will tell you whenever you try messaging someone who's either on a holiday or PTO, so try always using it and choose to schedule your messages!

- What not to do

It’s known that PTOs are a tool to help us on our work-life balance and mental health, right? So the main “not to do” here is: don’t bring up negative comments about peers and colleagues taking PTO, since that doesn’t really represent our beliefs and culture of trusting each other. We all have our own pace and personal situations, so we should always treat each other with respect and empathy.

As a leader, what can I do to help my team with this?

You do play an important part in helping your team both take more PTOs and enjoy them fully! So here are some tips for you:

1. Avoid sending that person messages as much as possible! Before reaching out to that person think if anyone else could have that answer or find it for you? Can anyone else deal with that problem for now?
2. If the person doesn't want to tell you much about the reason why they need a PTO don't pressure them. We have personal situations and sometimes we don't feel too comfortable talking about it, so this is a time where you'll need to be very understanding and empathetic!

An optional extra: Take initiative and block that person's calendar on their birthday beforehand! This will help the person know that you're "okay" with them having that time for themselves to celebrate with their family.

rocket.chat

HOW TO PTO

A QUICK GUIDE FOR TAKING TIME OFF

FIRST OF ALL, WHAT IS PTO?

PTO means Paid Time Off, but also stands for Personal Time Off

IT STARTS WITH:

- Sick Days
- Doctor's appointments
- Legal formalities

BUT CAN ALSO BE:

- Friend/family celebration
- Trips
- Self care time
- Emergencies
- Or any other reason that doesn't need to be disclosed

WHY TO PTO?

Knowing when to rest, stop, and take some time away for yourself or to spend with your loved ones, is an essential part of **maintaining a healthy work/life balance.**

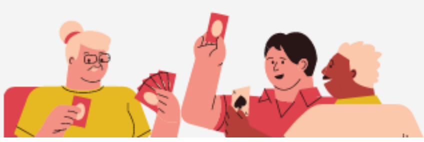
HOW TO REQUEST PTOS?

1. Tell your leader about it.
2. Ask for it on Zoho People.
3. Plan ahead.
4. Enjoy!

Unexpected events can be also included here.

Keep in mind that your birthday is already a PTO!

IMPORTANT NOTES



Don't feel guilty or blame anybody for taking time off.

If anything, taking time off for your well-being proves you care about your company

and your performance!

A quick guide to PTO!

Holidays, Vacations and Leaves

Holidays

We have a set list of National Holidays on Zoho People, these holidays are used to send the Zorro app notifications on our #important channel. In here you can check the full list. If you have a Regional Holiday coming up and it is **not on the list**, please follow these steps:

1. Send the People team the following information about the Holiday: **Name, Date, To which locations it applies.**
2. If you're sending the message on the date of the Holiday already: Just post a message complementing the automatic one that Zorro sends on important on the holiday, saying what is the holiday and where it applies to, but also do step 1 so the People team can create your holiday on Zoho.
3. *(Optional)* Whenever you're "out of office" on a Holiday we advise you to activate the automatic message bot to let your coworkers know about it if they try to message you.
   You can activate it by writing on open:
   `/out-of-office out <Message saying what holiday it is today>` And when you come back the next day just write: `/out-of-office in.`

Vacations

We advise all Rocketeers, no matter where you live, to take at least 20 days of vacation a year (apart from PTO). This is important for you to have some cool down time and to maintain a healthy relationship with work. In the case of Brazilian Rocketeers, you respond to the CLT vacation rules and you should ask for the days off at least **30 days in advance**.

On none of these cases we'll be able to "block" your calendar in advance, so we strongly advise you to block these days in your Google Calendar a while before to prevent people from scheduling any meetings on these special days!

Maternity and Paternity leaves

The time frames for both maternity and paternity leaves vary according to local laws. As a standard minimum we establish from 120 days for maternity leaves and 30 days for paternity leaves. The employee can request the leave also through Zoho People and is free to ask for more days using the unlimited PTO benefit or based on the local legislation, if it establishes more than the company standard the highest number of days is applied.

Sick Leave

If you have a sick leave, you should ask for a PTO at Zoho (option: Sick / Doctor’s order) and **attach the document from your doctor.**

Rocket.Chat will pay up to 15 days of sick leave. If you are a contractor, on the 16th day your contract will be automatically suspended until you are good to come back. If you are an employee in Brazil, you will receive from INSS following all the local laws. The benefits (except health care plan) will be also suspended on the period you are off.

Developing yourself

It is part of your journey as a Rocketeer to achieve a personal and professional development. In this section you'll meet the processes created for that specific goal!

Performance and Career Check-In

The Check-in is the most important tool and milestone for the development of our Rocketeers. It goes beyond an evaluation of performance since it was designed to attend to three main goals:

- Evaluating performance
- Aligning expectations about career growth
- Developing the career path of our Rocketeers

Our Check-in cycle is hosted at Qulture.Rocks and Rocketeers can log in by using their Google accounts (the platform is configured to only allow login from @rocket.chat emails).

The Process

A Check-in is composed of 5 steps:

- Indications stage
- Validation stage
- Answer period
- Reports
- Development Plan

To walk you through the step-by-step of each of them, here is the recorded training and the introduction material. If you're a leader, here's a guide on how to do each of your tasks during the process. In Qulture.Rocks' knowledge base you'll also find a collection of tutorials to help you during the process.

Indications Stage

The default evaluations everyone will fill out are a self-review, a review of the manager and of any direct reports, but you also have the option to indicate peers to evaluate you. Leaders can also indicate if they want someone to evaluate one of their team members.

If you want to participate in a peer's evaluation and give them a review just talk to them and ask them to indicate you or ask your leader to indicate you to evaluate them. Here are the three basic rules you need to follow regarding indications:

1. The system will **limit the number of peer indications** to 5 for everyone.
2. If you received more than 5 indications, during the indications or validation stages feel free to **refuse indications** from the Rocketeers you have less contact with and, therefore, less to contribute with. We indicate reviewing up to 5 peers to do a deep and healthy review.
3. Indications **will not be created by system admins **after the indicated period to maintain the freedom of evaluators to choose who to evaluate.

Validation Stage

At this stage leaders will validate their teams' indications, they may remove or add people if they believe someone's input could be more valuable to your development based on their understanding of your work routine.

As previously mentioned, you **can and should review all indications you received** during this step, selecting around 5 from the people you have the most contact with and can contribute the most to.

At the end of the validation stage, all indications left will be automatically validated by the system.

Answer Period

In this stage, you'll answer your self-evaluation, review your manager, any direct reports you have, and any indications you received. You’ll answer:

- **Your profile:** In this one, we want to look into your interests and aspirations. Do you know that dream of yours? That random skill you have? What position do you aspire to? This is the place to talk about it. To find it, just click on "Open profile" below your name on the home page of Qulture.Rocks.
- **Check-in Survey:** This is the survey you'll answer inside the Review module.

Reports

After the reviews are submitted, a report containing the results of the review will be generated and released **by the leaders**. This will be an important output that you'll use, together with your profile as input for your feedback session with your leader and the creation of your Development Plan. We indicate the release of the reports to be done close to the feedback session.

Development Plan

After the answer period, comes the time for you and your leader to get together for the feedback session. You'll go over the report, understand the difference in perspective of the responses you received and the possible reason for that, read your profile and talk about your aspirations, and all that will point to the *development areas* you should focus on for the next semester.

Some Useful Links

Here are some interesting materials that will also help you during this process:

- How to give constructive feedback
- How not to react to feedback you received
- Receiving feedback effectively
- How to prep for evaluating your direct reports

Learning

Here are the paths you can use to improve your skills!

iTalki

Train your English or learn any new language by talking to native-speaker teachers!
In the platform, the company will give you monthly $100 to spend on classes if you want to!

To get access, send an email request to patricia.ferreira@rocket.chat.

Important observation: As the possibility to learn languages is offered through iTalki, we **do not** reimburse language courses in the Courses and Books category.

Other Courses and Books

Want to do a course or buy a book to develop a skill related to your role or career development? Here's how this policy can support you with that! (Make sure to read this policy until the end to fully understand all limitations and requirements involved in it.)

- **For books:** Rocket.Chat pays for the full price of this segment.
- **For courses:** In this case we **always** use the 70/30 rule, in which the company pays for the 70% of the price and the Rocketeer 30% (*The only exception* to this rule are the cases where the company asks for the Rocketeer to do a course, in these cases Rocket.Chat will pay for the full price).

And here's how the process works:

1. You find a book/course you want to purchase. In here it's important to remind you that **these should be related to the development of skills related to your role or area of activity.**
2. **BEFORE** you enroll or purchase anything, validate it with the People team (@carolina.cyrelli).
3. If the People team approves it, you can go ahead, purchase it and request the reimbursement in the Books and Courses request page, always remembering to present the receipt of the purchase. However, let's pause here to discuss some important aspects:

You can do courses of any value BUT Rocket.Chat can only pay until a maximum amount. This maximum for Rocketeers **outside of Brazil is $500**, and for Rocketeers **in Brazil it's R$1.953**. (Brazilians might notice this is a very specific value, and that's for a reason! **By law**, companies are only allowed to pay up to 1,5x the Brazilian minimum wage in policies such as this one.)

Now, **very** important notes:

- This maximum value is **per course**, not per month. e.g. You purchased a $600 course, you can't request $300 in two months, you will receive 70% of $600 in one single month, so $420.
- The maximum value includes the total sum of any eventual additional taxes, such as enrollment fees or currency conversion fees.

There are only a few exceptions to this policy, and they are:

- **Long duration and high cost courses:** Such as MBAs and Post-graduate programs.

Approvals applied to these exceptions should be previously approved by the General Manager and should have been included in the year budget by the business area.

Retention Ranges (Applied only to courses)

The retention ranges are based on a common practice in benchmarked organizations and it's a form of creating a "two way street" between the organization and the Rocketeer through this educational support. Basically, different ranges of value of company support are attached to different expected retention periods. The period starts counting from the moment a Rocketeer requests the course, and if they leave the company during this period, they'll be requested to return the proportional value to the time remaining in the retention period.

Since there are different maximum values, to create a fair policy, there are also different divisions of retention ranges for Rocketeers in and outside Brazil.

- **In Brazil (maximum value R$ 1,818):**
  - R$ 0 to R$ 300 - No retention period necessary
  - R$ 301 to R$ 1,000 - 3-month retention period
  - R$ 1,001 to R$ 1,818 - 6-month retention period
  - Over R$ 1,818 **(exception approved by Head of the Area)** - 1-year retention period
- **Outside of Brazil (maximum value $ 500):**
  - $ 0 to $ 100 - No retention period necessary
  - $ 101 to $ 250 - 3-month retention period
  - $ 251 to $ 500 - 6-month retention period
  - Over $ 500 **(exception approved by Head of the Area)** - 1-year retention period

Expensing

Every request approved until the 15th of each month will be paid in the current payroll cycle (request made in April 13th, will be paid in the end of April). Requests approved after the 15th will be paid in the end of the next month.

Remember we have an annualy budgeted amount dedicated to team courses, and we need to wisely manage this amount in a fair way to all Rocketeers, therefore **always** verify with the People team **before** requesting.

Book Club

Running a book club is a great way for people to get together and share a common interest, and when you apply the concept to a company it not only allows you to learn something new from the book itself, but you also learn about the people within your organization.

Reading is an important tool to improve who we are, what we do, and the value we deliver in our jobs, and this is how the idea for a Rocket.Chat Book Club was born. Besides, having Share as one of our DOTS, it makes more than sense to also share some learnings, insights and well... some books!

Here's how it's going to work:

1. Each area will create a Reading Challenge with a list of books to read throughout 2021.
2. Through the year the team will mark the books in progress and completed and they can exchange ideas about it.
3. At the end of the year, everyone who scores at least 10 point in the scoreboard will receive an Amazon voucher as a prize depending on how many point you scored in total!
4. Added to this, Gabriel will periodically have a CEO Pick of book, which can be added to the areas' Reading Challenges. There will be a round table with a set date conducted by him with all who read it!

Now let's talk points and rules!

- CEO Pick - 3 points
- Books related to the area's activities, business & non-fiction - 2 points
- Other books like fiction and fantasy - 1 point

And as explained before the prizes will be distributed according to how many points you score in the following way:

- 10 points - 100 stars in the AllStars program
- 11 to 30 points - 150 stars in the AllStars program
- 30 points or more - 200 stars in the AllStars program

Suggestions to have an awesome book club routine in your team:

- Set due dates for everyone to read the same book and have a discussion about it
- Create a channel on open to share with your team what you have been reading, recommendations and evaluations of the books you read
- Create a weekly challenge in the team of number of read pages

For book suggestions check out Goodreads and the Amazon Kindle page.
And here is an online library you can use!

Current CEO Pick

- **Principles**
  by Ray Dalio
- **Unusually Excellent**: The Necessary Nine Skills Required for the Practice of Great Leadership
  by John Hamm

You can use the Learning things policy to purchase the CEO Pick!

Summit

Rocket.Chat yearly holds a Summit!

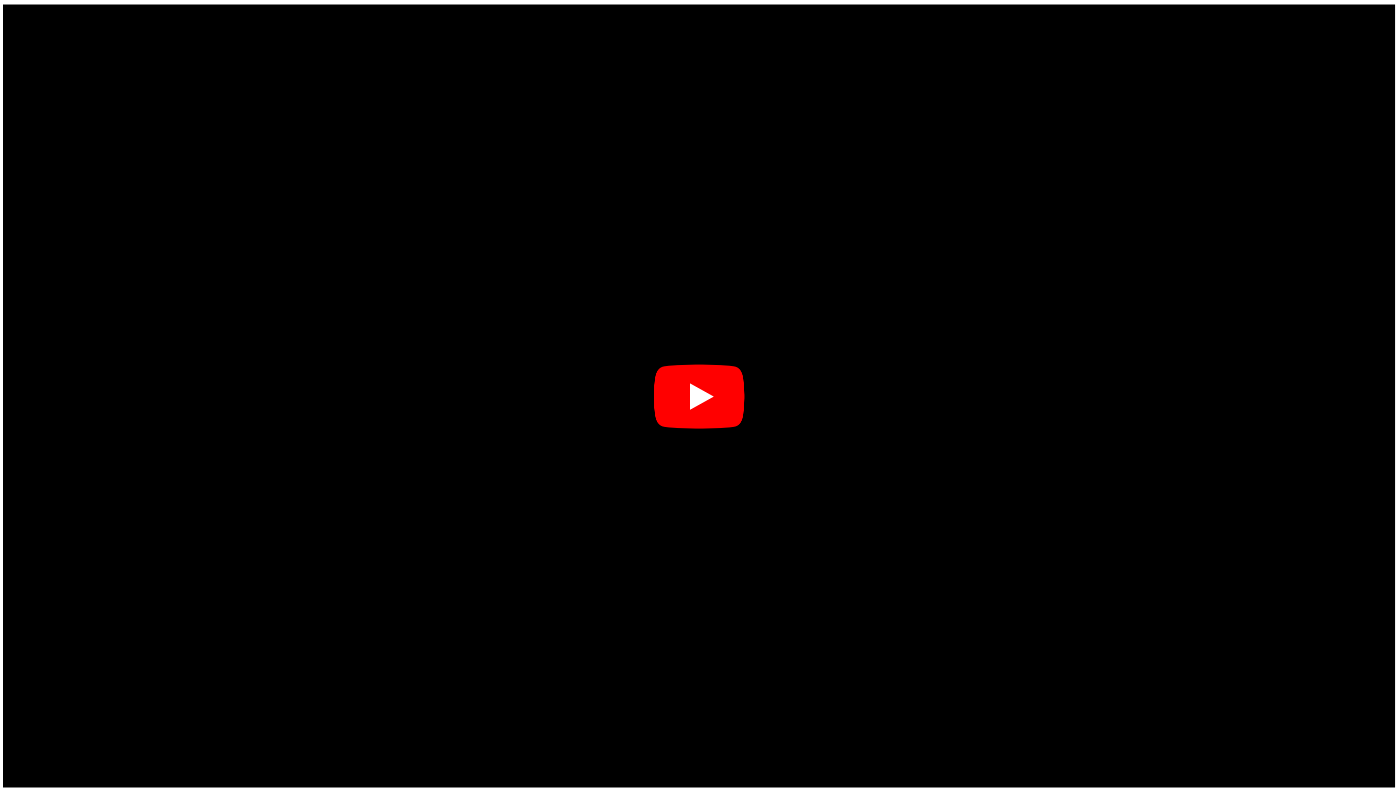
The Summit is the most expected moment for our team since it's when we bring the entire team together in one place. Although attendance is optional we highly recommend it because during the Summit you'll have the opportunity to meet all team members in person.

As we work remotely, the Summit provides the opportunity to meet all Rocketeers in one place and to practice our Culture Code so that whenever we’re all together it feels as if we never worked far from each other.

By participating in the Summit, you will also:

- [ ] Develop and strengthen relationships
- [ ] Get a deeper understanding of our team's strengths and weaknesses
- [ ] Align projects with the Executive Team for short, medium, and long-term
- [ ] Participate in team-building moments and discussions about the company's strategies

Rocket.Chat on LinkedIn: Today marks the end of our 2022 Summit! After two years away due to the…
linkedin



Rocketeer Referral

Find out more about our rocketeer referral and rewards program!

Do you know that moment when you see that open position for working in Rocket.Chat, and you remember that friend you had that fits **perfectly** with the description? *That person could be our next Rocketeer!* And the **Referrals Program** exists so we can reward our Rocketeers who refer other amazing people to join our team!

How it's going to work:

1. All Rocketeers can submit referrals! To do that you just have to: Enter the Google Workspace Dashboard > Click on the Greenhouse icon > Sign in with your Rocket.Chat email > On Greenhouse's header, click on  and then on "Add a Referral".
2. Fill out the information about your referral and it's done!

If your referral **joins the team and stays for at least 90 days**, you'll get a reward sponsored by the **Referrals** system!

*****Hiring managers are not eligible for Referrals Reward if the candidate is indicated for a position reporting to itself once it's their responsibility to build and manage their team.

But are these rewards?

You'll get an **Experience Pass** ✨ It's being launched in the system to be credited to you as soon as you complete 3 months in the company, then the Finance team will add the value corresponding to one-month remote benefit (see values according to a location in the link) to your next paycheck.

You can use this credit to pay for experiences such as:

- An awesome dinner
- A class of something you like (maybe dancing? maybe some sport? maybe cooking?)
- A surprise breakfast for your loved one
- That game subscription you've always wanted
- An Airbnb Experience

If any questions you have just reach out to the People Experience team!

Our Wishlist

The **Wishlist** is a magical box that you can use to share your ideas, thoughts, and wishes of actions, training, events, or even happy hour activities you would like to see in Rocket.Chat and that you think would help make the Rocketeer Experience AWESOME!

You can find it by clicking on this link!

Career Path

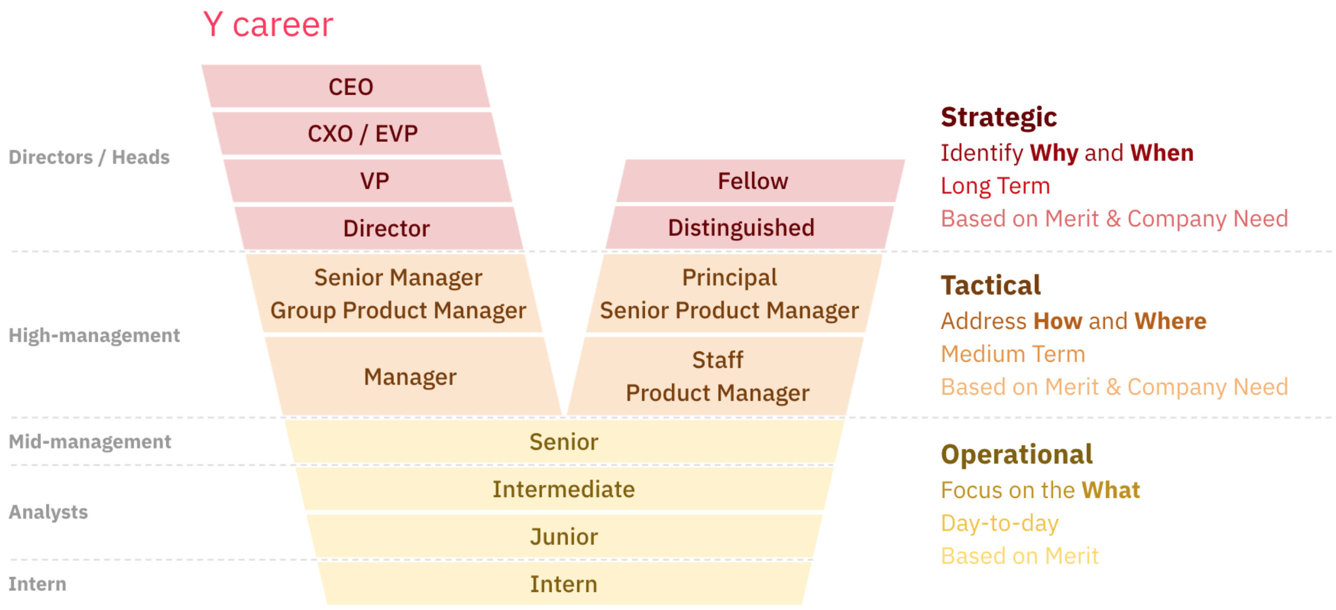
Intro

The Rocket.Chat's career path considers the long-term relationship development with the team member. This trail goal permits the full development of the team members, weighing their expectations, skills, and company needs.

The paths consider technical and nontechnical aspects based on a “Y” career allowing the team member to tread their career path in a technical or the management trial reaching similar levels, regardless of path chosen by the employee.

Career Paths by Area

Levels



Strategic Level

This level is in charge of **setting the company’s goals**, provide and approve the resources supply for the other company levels to reach the objectives.

Seniors professionals, as C-Level, Fellows, and Distinguished, form this level. They are part of the company’s executive meeting, and ideally, this level is in charge of a department of the company.

The strategic level has a specific budget typically and has a set of OKRs to be accountable for delivery.

Daywork

A strategic level member has to regularly **touch the bases with their managers**, represent the company in external meetings, meet the department in internal meetings, and discuss strategy with their pairs and their working teams.

The strategic level member also **knows the operations** very well and must keep in touch with the other organization’s members.

Outcome

The strategy must answer **WHY and WHEN** the company has to reach each goal. **The definitions of Vision, Mission, and Company values** are other important outcomes from the strategic level. This stage offers a long-term view of the company.

It is essential to say that all those concepts mentioned in the last paragraph must be clear, tangible, and intelligible for the other organization’s levels since the strategic level has more information and context than the tactical and operational teams.

Tactical Level

The tactical level is in charge of **transforming the company goals into actions and initiatives**. Middle-level or senior professionals as Principal, Managers, and staff participates in committees and commissions and provide information for the other levels of the organization.

They usually do the **management of the resources of company departments**. The tactical level is in charge of being a bridge between the strategy and the operation.

Daywork

The tactical level members **oversee the operation daily**, **move the roadblocks**, and represent the department in meetings. Give guidance for the operational team and measure the efficiency of the ongoing activities. **Map, support, and give maintenance** for the actual business **process**.

Outcome

The tactical must answer **HOW and WHERE** the company will reach the goals. The roadmaps and the portfolio are other essential outcomes. The tactical level members are in charge of providing executive information for the strategic level and translating the strategy into actions for the operation. This stage offers a medium-term view of the company. This level must act as a coach, helping to identify how to held the best of each resource.

Operational Level

The operational level is in charge of **delivering value to the product, client, and user**. The Operational level Is the part of the company that puts the strategy and the tactics ongoing. Formed by Junior, Intermediate, and Senior professionals, the operational team members execute the actions and initiatives defined with the tactical level.

The operational team member can also create a new strategy or tactic initiative helping the organization on another level.

Daywork

The operational team member executes the process and **adds value to the products** and services supplied by the organization. In addition, the operational team is **involved in the planning, improvement, and implementation of the strategy and the company’s tactics**.

Outcome

The operational team must answer **WHAT** company objectives were reached**.** As the closest client part of the company, the team helps provide feedback that will enable the organization to set new strategies and tactics. The members of this level have to provide operational support and information for the other levels of the organization. This stage offers a Day-to-day view of the company.

The Rocket.Chat Career Path

Rocket.Chat adopted a model where both technical and management careers can reach the same levels. According to the company beliefs, collaborators can be very skilled technical professionals and be well recognized in roles and salaries.

Adopting the “Y” career path model permits the team member to evolve in the first career steps with a common axis. Then, after deciding, based on the personal objectives and company needs, the development path will be followed.

Once someone reaches a Senior-level role and wants to progress, they will need to decide if they wish to remain purely technical or pursue managing technical teams. Their manager can provide opportunities to try tasks from both tracks if they want to. Staff-level roles and Manager roles are equivalent in terms of base compensation and prestige.

The Common Axis

Will be assigned Intern, Junior, Intermediate, and Senior levels to the entry positions according to their experience, skills, and characteristics. In this common axis, there’s no separation between Technical and Management careers.

The Individual Contributor Axis

Technical excellence is something that Rocket.Chat values. Individual contributor career path allows the team member to keep their development without considering a change to a management approach and still with similar compensation.

The specific trail also clarifies the requirements for the team member assignment within a particular position.

Roles

In the individual contributor path, the team member can reach the following levels:

At Tactical Level

First Stage

Staff or Product Manager: Considering the career will be directed for a product or technical trail.

The first step of the tactical level is acting as a consultant and an individual reference for the team.

Second Stage

Principal or Senior Product Manager: Considering the career will be directed for a product or technical trail.

The second step of the tactical level is acting as a high consultant and a corporative reference for the team.

At Strategic Level

First Stage

Distinguished: At this level, the person's contribution plays to their strength and role on the team. These contributions come in different forms: Provides technical direction to stakeholders (Product, Sales, others) and being the primary reference for the company on a specific topic influencing the company's strategic decisions.

Second Stage

Fellow: Advocate for improvements, being a principal reference for a specific product, service, or technology. Exert significant influence on the overall objectives and long-range goals. Solve technical problems of the highest scope and complexity for the entire organization.

The Management Axis

In the management path, the team member can reach the following levels:

At Tactical Level

First Stage

Manager: At this level, the managers will seek to build out a great team, happy and prosperous; They will improve processes to make the team more effective. Plan and execute long-term strategies that benefit the team and the product stage**.** In charge of the people management, the manager must hold regular 1:1's with all team members helping the people evolve and grow up as a professional.

Second Stage

Senior Manager or Group Product Manager: At this level, the person must extend the manager's responsibilities; Manage multiple teams. Generate and implement process improvements, especially cross-team processes. Regarding people management, this individual must hold regular 1:1s with team managers and skip-level 1:1s with all team members. Establish a management mentorship.

At Strategic Level

First Stage

Director: At this level, the person must extend the Senior Manager requirements and add excellent communication skills; Expert hiring manager skills. Be the manager of managers and keep solid agile project management skills. This position requires also to be in charge of budgeting and the second level OKR management, overseen the initiatives related.

Second Stage

VP: At this level, the person must extend that of the Senior Director, Development responsibilities. It expands the role to cover full functional and product capabilities at Rocket.Chat. Drive recruiting of a world-class team at all levels. Help their directors, senior managers, managers, and individual contributors grow their skills and experience.

Third Stage

C-Level: Be the principal management reference in the department. At this level, the person will be in charge of developing the organization strategy, defining the company's main objectives, and representing the company for the board of investors. In addition, be a mentor to the company leadership.

The Reference

Considering the model proposed is replacing the old one, it is essential to mention the reference for keeping the consistency between the old and the new.

It Is important to reinforce that all the positions will receive a grade, and this grade will be the reference to link the old and the new chart.

The grades start at four and go until 16, and it doesn’t depend if the team member is a Manager or an Individual Contributor. An individual contributor can have the same grade as the Manager and consequently the same salary input. It is also must consider that the compensation has others inputs like the region and fee charges.

Engineering Career Path

Old to new levels

Management	Individual Contributor		Management	Individual Contributor
			CEO	
Director		=>	CXO / EVP	
			VP	Fellow
Manager	Specialist	=>	Director	Distinguished
			Senior Manager / Group Product Manager	Principal / Senior Product Manager
Lead	Distinguished	=>	**Manager**	Staff / Product Manager
	Senior	=>		Senior
	Intermediate	=>		Intermediate
	Junior	=>		Junior
	Intern	=>		Intern

Disciplinary Actions Policy

Purpose

Our Disciplinary Action policy explains how we address our employees’ misconduct, offensive behaviours, or information security breaches.

This policy is designed to help and encourage you to identify and speak up about any of these situations and outlines the process that will be used if Rocketeers fail to achieve and maintain the required standards.

We want you to have clarity about the paths you can use to speak up about any of the situations mentioned in this, in the no-retaliation policy and the workplace violence policy, so we're here opening a Hearing Channel forms if you want to keep anonymity. If you feel comfortable you can also discuss any situation with your manager or with the People team.

Scope

The Rocket.Chat Disciplinary Action Policy applies to all staff. This policy aims to ensure consistent and fair treatment for all at the company.

Principles

Our disciplinary procedure begins when there is sufficient evidence to justify it. When there is suspicion or hints of misconduct, managers or HR must investigate the matter first. Informal action will be considered, where appropriate, to resolve problems. No disciplinary action will be taken against you until the case has been fully investigated. For formal action, you will be advised of the nature of the complaint against you and will be given the opportunity to state your case before any decision is made at a disciplinary meeting.

You will have the right to appeal against any disciplinary action.

HR and managers should document every stage of our disciplinary procedure. If appropriate, include necessary information like evidence, testimonies, and employee progress or improvement.

We are obliged to refrain from disciplinary actions that may constitute retaliatory behaviour. A no-retaliation company policy (See appendix) will be effective at all times to ensure there is no misuse of our disciplinary procedure.

We have the right to modify this policy or act in any other legal or reasonable way as each case demands. But, we will always enforce discipline fairly and lawfully.

The Procedure

The Rocket.Chat Disciplinary Action Policy can result in the following actions being taken. The decision as to the appropriate action will depend on the circumstances of individual cases and will be decided once a full investigation has taken place.

1. Verbal and/or Written Warning

3 records can generate a suspension. The warning is the simpler disciplinary action and that is precisely why it is applied by the employer only in case of minor offences, being alert about the wrong conduct so that the employee will not repeat it. Verbal warnings should be documented and written warnings must be signed.

2. Suspension

Suspension is more severe, therefore it should be applied in case of offences of medium gravity or when the employee has accumulated warnings by similar conduct. In this case, the employer is allowed to proceed with salary discounts for the days the employee was suspended. The suspension must not go over 30 days.

3. Termination of Contract

The most severe action is the dismissal or termination of the contract. This is applied solely when there is robust comprobation of the offence, and to apply it the offence must be serious enough to make the continuity of the employment impossible due to loss of trust between the company and the employee.

Types of Offences

The circumstances that lead to disciplinary action and the appropriate action to be taken in each case are the following:

- **Performance Issues**

The disciplinary procedure starts at stage 1 (Verbal/written warning). It includes but is not limited to:

1. Failure to meet performance objectives.
2. Attendance issues.
3. Failure to meet deadlines.

- **Misdemeanours/One-Time Minor Offence**

The disciplinary procedure starts at stage 1 (Verbal/written warning). It includes but is not limited to:

1. Rude behaviour toward customers or partners.
2. On-the-job minor mistakes.
3. Involuntary Discrimination.

- **Misconduct/Frequent Offender**

The disciplinary procedure starts at stage 2 (Suspension). It includes but is not limited to:

1. Lack of response to counselling and corrective actions.
2. Lost temper in front of customers or partners.
3. On-the-job major mistakes.
4. Unwillingness to follow health and safety standards.

- **Severe Offensive Behaviour/Felony**

The disciplinary procedure starts at stage 3 (Termination of contract). It includes but is not limited to:

1. Corruption/Bribery.
2. Breach of an employment agreement.
3. Harassment/Voluntary discrimination.
4. Workplace Violence (See appendix)
5. Embezzlement/Fraud.

- **Information Security Breach**

The disciplinary procedure starts at stage 1 (Verbal/written warning). It includes but is not limited to the items listed in the Rocket.Chat security policy.

Appeals

If you wish to appeal against a disciplinary decision, you must do so within five working days. The senior manager will hear all appeals and his/her decision is final. At the appeal, any disciplinary penalty imposed will be reviewed.

Appendix: No retaliation policy

Our No Retaliation company policy describes our provisions towards employees who file reports for harmful, discriminatory or unethical behaviors. Whether accusations are true or false, our company wants to prevent victimization and other retaliatory behavior towards the employee. We believe it's important that employees aren't afraid to speak up about any issues. It's to our company's benefit to resolve them as soon as possible. An environment of fear can only be harmful in the long run.

We'll follow all legal prohibitions for retaliation and will grant employees the right to speak about misconduct. In any case, we will make an effort to preserve legality and business ethics.

This policy applies to all prospective, current or former employees of the company.

Actions that often bring about retaliation include but are not limited to:

- Complaints for workplace harassment or discrimination
- Complaints for company actions that harm the environment or society
- Requests for parental or other leave
- Participation in a pending investigation of misconduct or violations
- Lawsuits for wrongful dismissal or termination for cause

Employees may file complaints internally to a manager or Human Resources Department through the Hearing Channel Forms. Or they may speak to people able to take legal action against the alleged guilty party. These employees are called "Whistleblowers".

In any case, we'll follow our harassment-free workplace principles. Employees who report misconduct or suspected violation must be protected from retaliation. We don't want to silence complaints, but we encourage open communication.

We need a no retaliation policy for two reasons. First, when reports have a solid basis, we must consider them and take action. Retaliating against an employee who brought attention to inconsistencies or violations will harm our company's trustworthiness and reliability. Secondly, any kind of retaliatory action, whether intentional or unintentional, may expose us to a serious legal risk.

It's important to note that this policy refers to circumstances when an employee's report is true as well as circumstances when the report is baseless. We don't consider the report's validity when it comes to no retaliation principles, as required by law.

Retaliation in the workplace may be expressed in a variety of ways. These include but are not limited to:

- Victimization
- Termination or illegal retraction of benefits
- Reduction of compensation
- Poor work performance evaluation
- Exclusion from corporate events or meetings
- Defamation of character (prominent in cases of former employees)

Retaliation is in general defined as any kind of negative action against a current or former employee that takes the form of punishment, and creates a hostile, threatening or uncomfortable environment as a result of their reported complaint.

Employees that are found guilty of retaliation will be subject to disciplinary action that may also result in termination.

Disciplinary action may also apply to employees who have repeatedly filed false or unreasonable complaints against us and are proven to have been intentionally lying, falsifying evidence, acting maliciously or for personal benefit. That way we can ensure that employees do not take advantage of our policy and act always in good faith.

Actions

No retaliation policy applies to all official or unofficial reports. All complaints will be kept confidential and investigation will be as little disruptive as possible.

In cases of lawsuits or complaints filed in an authority or legal entity, employees won't be victims of retaliation.

If an employee files a complaint with our company for another employee, we'll take it seriously and investigate thoroughly. If we need to act immediately during our investigation (like in cases of harassment), we'll ensure the employee who filed the complaint will not be affected in any way. The alleged wrongdoer may see their employment or position affected until the investigation is concluded.

In some cases, an employee who has filed a report may face disciplinary action on an unrelated offense. We’ll provide official documentation stating the reason for disciplinary procedures against the employee, along with evidence for their misconduct.

Appendix: Workplace violence policy

This policy applies equally to all employees, contractors, public visitors, clients and anyone else whom employees come into contact with during work.

“Workplace violence” refers to physical acts of violence or threats to harm a person or property. Abusive behaviors, whether verbal, psychological or physical, are also considered violence. More specifically:

- Verbal abuse can be using unwelcome, embarrassing, offensive, threatening or degrading language.
- Psychological abuse is an act which provokes fear or diminishes a person’s dignity or self-esteem.
- Sexual abuse is any unwelcome verbal or physical assault.

We can’t always predict violent acts, but we ask managers and team members to be vigilant. Report any concerns or violent acts to HR as soon as possible. Examples of violent behavior among co workers include but are not limited to:

- Intimidating or bullying others
- Abusive language
- Physical assault
- Threatening behavior
- Concealing or using a weapon
- Sexual or racial harassment

All supervisors and managers are responsible to implement our policies and ensure that all procedures are free of discrimination.

Employees who witness or suspect violence, or are victims of violence, can report to HR through the Hearing Channel Forms or their immediate supervisor. We will investigate quickly and discreetly. We aim to protect victims from harassment and victimization.

Our company doesn’t tolerate violence. Any such behavior will trigger appropriate disciplinary action, up to and including termination, removal from boards or committees, as well as potential criminal charges.

🔐 Security

Purpose

The purpose of the Security team is to define which risks the company is exposed to and mitigate them to a business acceptable level.

We need to make sure the security best practices are being applied and guarantee the security of our applications and find and respond to new vulnerabilities and incidents, ensuring the confidentiality, integrity, and availability of our services.

Members and functions

- Bruno Cestari: Senior Security Engineer
- Igor Rincon: Staff Security Engineer
- Giovani Salvador: Manager

Top OKRs, relevant for Security function, built by stakeholder input

1. Company Scale - Scale and build a strong (Security) Team, (while: Securing other teams´ growth)
2. Revenue Stream - Grow the business, driving ARR
3. Customer Centric - Productize internal services or processes, applying a CC-attitude
4. Enterprise Product - Establish industry leadership as B2B comms platform
5. Community Engagement - Increase dev relationships (incl. White hats)

Main Tasks

Objective of the security team is to help everyone to keep Rocket.Chat and our customers secure. We can only achieve that when we all work together!

Communication and Information

Discussion Channels

- RC security channel - day-to-day conversation, invite on request
- RC important - company-wide announcements
- RC-security-team - team-internal conversations, all team members are added during onboarding

Mailing lists

- Security mailing list - all things related to security
- Privacy mailing list - all things related to privacy@rocket.chat

Public

- Security solutions - summary of security features of the product
- Invitation to contribute to security - Disclosure policy

Policies

See Security Policies

Playbooks

Playbooks help us to standardize certain processes around security and enable transparency on how we work. The following are the security playbooks.

Refer to Security Playbooks

Roles and Responsibilities

Security roles at Rocket.Chat

<table>
<tr><td>Junior Security Engineer</td><td>

Vulnerability management: Analysis and report of vulnerabilities using a variety of sources.
Internal pentest focused on infrastructure and web application.
Education of developers on best practices for secure coding.
Review security alerts.
Participate in projects related to security.
Support to bug bounty programs.
Access control activities.
Participate in forensic analysis.
Support for more senior security engineers.

</td></tr>
<tr><td>Senior Security Engineer</td><td>
In addition to a junior security engineer, a senior security engineer also does the following.

Leverage understanding of fundamental to advanced security concepts.
Constantly improve product security.
Triages and handles/escalates security issues independently.
Leads one or more security initiatives.
Conduct security architecture reviews and makes recommendations.
Interview security candidates during hiring process.
Detect and respond to company-wide security incidents.
Log analysis.
Security forensics.
Develop and implement preventative security measures (detection, monitoring, exploitation).
Vulnerability management - triage and manage vulnerabilities identified through scanning and manual efforts.
Identify and mitigate complex security vulnerabilities before an attacker exploits them.
Communicate risks and mitigations across multiple audiences with varying levels of sensitivity.

</td></tr>
<tr><td></td><td>
In addition to a senior security engineer, a staff security engineer also does the following.

Research and implement technical and process improvements for security at Rocket.Chat.
Discover security issues through penetration testing, source code review and design review.
Communicate issues and their severities to teams across Rocket.Chat with clear recommendations for how to fix them. Assist with fixing issues as needed.
Leads one or more security initiatives.
Develop security training and guidance to internal development teams.
Help review most important features and security fixes, also submitting

</td></tr>
</table>

Staff Security Engineer	pull requests. • Maintain handbooks about best security practices. • Provide subject matter expertise on architecture, authentication and system security. • Assess security tools and integrate tools as needed into the development process, particularly open-source tools. • Manage and grow bug bounty-like programs. • Ability to discover and patch XSS, CSRF, SSRF, authentication and authorization flaws, and other web-based security vulnerabilities (OWASP Top 10 and beyond). • Write public blog posts and represent Rocket.Chat as a speaker at security conferences when necessary. • Proactively identify and reduce security risks in our code. • Find and replace vulnerable code and code libraries. • Consult with other Developers and Product Managers to analyze and propose application security standards, methods, and architectures. • Educate other developers on secure coding best practices.
Application Security Engineer	• Work with project managers and technical leads to implement and improve processes regarding SDLC • Define and implement an application security strategy • Designing and implementing security controls within our application stack • Generate and improve reports to guarantee that all processes are healthy • Conducting code reviews and threat modeling to identify and mitigate potential security vulnerabilities • Maintain and improve our current tooling that detects vulnerabilities in the development process • Contributing security-focused feedback to engineers during all phases of the development lifecycle • Seeking out opportunities to automate processes when appropriate • Communicating risks to engineering staff through training and technical demonstration of vulnerabilities and secure design patterns • Maintaining and creating secure development practices and programs for our engineering teams and external developers Acting as an ambassador for security within Rocket.Chat

Security Policy

Page 1We have created a general information security policy and specific policies for related topics and are working to put them in place. These policies are necessary to set up secure processes and demonstrate our compliance with industry standards towards our customers. You can also find the annual acknowledgment forms here.

In case of any questions, contact the security team. More information on this page

Do you want a short summary? You can find a security one pager here!

Mandatory Acknowledgment & Secure Configuration

Because we all must follow our security policies, we have set up GoogleForms that you can fill out and submit. Use the following 3 checklists to set yourself up securely:

- Policy Acknowledgment, an acknowledgment for our current policies. Mandatory to complete annually by all employees
- Security configuration, a checklist to set up a basic secure configuration of your tools. Mandatory to complete annually by all employees.

Overall Security Policy

Overall Management intention on security and baseline for our security management system.

Purpose

Rocket.Chat places a great emphasis on protecting its information. Such information includes e.g. information we manage on behalf of our customers, personnel files, our intellectual property.

At Rocket.Chat, we aim to ensure at all times that information we manage is appropriately secured to protect against the consequences of breaches of confidentiality, failures of integrity or interruptions to the availability of that information.

Our objectives are:

- We will meet all applicable requirements in properly protecting our information, including: laws, regulations, industry standards and contractual commitments
- The protections we apply to information assets will be in proportion to the value and sensitivity of the information, and will balance the sensitivity of the information against the cost of controls, the impact of the controls on the effectiveness of business operations and the risks against confidentiality, integrity and availability of the information
- We will ensure that these controls are accepted by all employees, vendors, service providers, representatives and associates of our company who may have access to our information. This includes ensuring that all personnel at all levels are aware of, and are held accountable for safeguarding information assets
- We will identify and mitigate any breaches to this policy.
- We aim to continually improve our security practices over time.

Applicability and Ratification

This information security policy provides management direction and support for information security across the organisation. Specific, subsidiary information security policies, procedures and guidelines are considered an integral part of this information security policy, because only when followed in its entirety, we can ensure the objectives of this policy are met. This policy has been ratified by Rocket.Chat´s management team and forms part of its policies and procedures. It is applicable to and will be communicated to our staff, contractors, students and other relevant parties.

Responsibilities

Everyone handling Rocket.Chat information has the responsibility to keep the information safe, no matter where the information is located. This includes our staff members, contractors, students, etc., but also our suppliers (e.g. those that provide us with our tools to work) and other recipients of that information.

To determine the appropriate levels of security measures applied to information systems, a process of risk assessment is carried out to identify the probability and impact of security failures.

To manage information security within the organisation an information security oversight committee is established, chaired by Rocket.Chat´s Security Lead and consisting of senior members of our relevant teams. The objective of this committee is to ensure that there is clear direction and visible management support for security initiatives. This oversight group shall promote security through appropriate commitment and adequate resourcing.

An information security working party, comprising management representatives from all relevant parts of the organisation, shall devise and coordinate the implementation of information security controls. The responsibility for ensuring the protection of information systems and ensuring that specific security processes are carried out shall lie with the head of the department managing that information system.

Specialist advice on information security is available throughout the organisation. Any member of the organization can contact his manager or directly Rocket.Chat´s Security Lead.

Rocket.Chat will establish and maintain appropriate contacts with other organisations, law enforcement authorities, regulatory bodies, and network and telecommunications operators.

Violations of our policies will be handled in accordance with the severity of the violation and applicable rules and regulations, including up to termination of contract for severe violations.

Review

This policy is reviewed and updated regularly to ensure that it remains appropriate in the light of any relevant changes to the law, our other policies or contractual obligations. We will inform relevant parties about the updates.

The implementation of the information security policy shall be reviewed independently of those charged with its implementation.

Security Special Policies

The following are subpolicies related to specific areas and supplement the general policy.

Organization

We maintain a RASCI-chart that contains the responsibilities around information security. Conflicts of interest in these responsibilities must be avoided and tasks that create these conflicts be assigned to different persons. Where this is not possible, compensating controls (e.g. four-eyes principle) should be considered.

Current conflicting roles identified:

- The roles of data protection officer and security lead are currently taken by one person and cases of conflict of interest will be raised to the management team to resolve.

The company maintains relevant contacts with authorities and agencies, those relevant for Rocket.Chat being mostly:

- Data protection agencies
- NIST
- ISO
- Open Source Community

In project management, the project leads are responsible to ensure security is properly addressed in a project.

Personnel Security

All personnel is screened before entering a position and subject to a Terms of employment, including a duty of confidentiality. The screening process is in relation to the applicable laws and regulations as well as the requirements of the position. All personnel is subject to contractual terms that describe their duties. The Information Security Team ensures that all personnel is aware of Rocket.Chat´s Security policies. Personnel that is leaving Rocket.Chat must certify that all assets have been returned to the company and then will be de-registered from the user directories.

The details of these processes are implemented and the records kept by the Human Resources Team.

Asset Management

An asset is something of value for Rocket.Chat such as, but not limited to, information itself, a device, intellectual property.

This policy cover important security aspects and guidelines that help rocketeers to protect and avoid any misuse of company owned assets.

The lists of assets can be found here.

Data Classification & Lifecycle Policy

Refer to Data Classification and Management Session

Physical Security, incl. Homeoffice

Porto Alegre

- Read the rules that are pinned in the office
- Join the Rocket.chat channel to be informed about news

Homeoffice / Remote Work

Refer to Remote work policy

Cryptography and Key management

Cryptography is the practice of securing information by transforming it into an unreadable format, which can only be understood by those who have the key to unlock it. Cryptography is used in various applications, such as secure communication, digital signatures, and data protection.

Key management is the practice of protecting and managing the cryptographic keys used in encryption and decryption. It involves generating, storing, exchanging, and revoking keys to ensure that the encryption and decryption process remains secure. Proper key management is essential for maintaining the confidentiality, integrity, and availability of information that is encrypted using cryptographic algorithms. Key management also includes ensuring the authenticity of the keys, so that the right person or entity can access the encrypted information.

For detailed information and guidelines refer to Cryptography and Key management session

Authentication and Password Policy

Authentication is the process of verifying the identity of a user or system entity. It is a security mechanism that helps to ensure that only authorized individuals or systems are granted access to a particular resource, such as a system, network, or application.

Here you can find our detailed Authentication and Password policy

Secure Development & Change Management

Secure engineering basic principles:

Features or changes involving components that could affect overall system security (e.g. authentication, encryption, access control) should consider the following steps:

- have a thoroughly documented PR explaining the change
- the PR must pass all checks, alerts must be remediated before merging
- be subject to the regular tests (including security tests) before a release and not be introduced after these tests
- should check if documentation needs to be updated and if so, update it

Changes to assets should only occur when a change is necessary. All changes must be controlled. All changes related to source code must occur through the authorized version control system (e.g. GitHub). In case a change is urgent, the change control process may be shortened by decision of management, in order to mitigate potential damages to the organization.

Accessing Customer Data

For access to customer data, you must adhere to the following:

You may only access customer data if

- The customer specifically requests it (e.g. support request) *or*
- When it is necessary for us to fulfill our contractual obligations (e.g. to act proactively to prevent an instance from failing)

Access is strictly limited to the data needed to fulfill the request. You may not access data of other customers. No customer data may be extracted unless this is strictly requested by the customer. All data extracted must be stored safely and deleted when it is no longer necessary.

You must terminate the session immediately after the reason for your access has been resolved. You must as soon as possible inform the customer of the outcome of your access.

Incident Management

An incident is any event that has the potential to affect the confidentiality, integrity or availability of Rocket.Chat information, in any format, or IT systems in which this information is held. Violations of laws, policies, contractual obligations or also external requests should also be considered as incidents in this sense.

Examples of incidents include:

- Lost devices
- A suspicious and successful log in
- Malware incident
- Ransomware attack
- Email with confidential data sent to wrong recipient
- Law enforcement requests to disclose data of customers

The Rocket.Chat's incident response plan is an internal Document that can be found here: Incident Response Plan

Business Continuity and Disaster Recovery

Refer to Business Continuity and Disaster Recovery

Procurement

All Systems procured must comply with defined information security requirements. Those requirements are defined before a procurement decision is made.

Supplier Relationship

Refer to the new page Supplier Relationship.

Auditing

The Information Security Team will audit the design and implementation of these policies on a regular basis, with a focus on risks identified in the risk management process. Where a potential conflict of interest takes place, the audit will be delegated to another individual with such conflict or other compensating controls be taken.

Security Awareness and Training

Please refer to Awareness and Training session

Assets Management

Asset Management

All assets must be inventoried. An asset is something of value for Rocket.Chat (e.g. information itself, a device, intellectual property). We maintain a list of all devices and all software used, including additional information relevant per type of asset. References to sublists for assets (e.g. virtual machine inventories, mobile device lists) are allowed and should be referenced. The amount of effort needed to maintain a detailed list of assets should correspond to the criticality of the asset.Assets must be returned to Rocket.Chat once an owner leaves the organization. Ownership of an asset and the risks associated with an asset are separated to focus on overarching risk mitigation without boundaries between assets.

The lists of assets can be found here.

Acceptable Use

This section is about general acceptable use of equipment, systems, the internet, etc. when you are using those in a capacity for Rocket.Chat. We have additional, specific policies for device types, which are presented in the upcoming sections.

Applicability:

This policy applies to assets, when these assets are provided by Rocket.Chat or when they are provided by you and used in the name of Rocket.Chat. Assets are: Internet/Intranet/Extranet-related systems, including but not limited to computer equipment, software, operating systems, storage media, network accounts providing electronic mail, WWW browsing, and FTP. It does not apply to the usage of e.g. your private internet at home when not working for Rocket.Chat.

Acceptable Use:

Assets must primarily be used for business purposes in serving the interests of the company, and of our clients and customers in the course of normal operations. You are responsible for exercising good judgment regarding the reasonability of personal use. Personal use may never endanger the objectives of our policies (e.g. via actions regarded as unacceptable use)

Unacceptable Use:

The following are examples of unacceptable use:

- Violations of the law or of rights of any person or company, e.g. copyrights, patents, trademarks
- Accessing data, a server or an account for any purpose other than conducting company business
- Exporting technology in violation of international or regional export control laws
- Introduction of malicious programs into the network or server
- Revealing your account password to others or allowing use of your account by others. This includes family and other household members when work is being done at home.
- Making statements about warranty, expressly or implied, unless it is a part of normal job duties
- Effecting security breaches or disruptions of network communication, e.g. port scanning or security scanning
- Circumventing user authentication or security of any host, network or account.

Certain exceptions to the items listed under acceptable use apply when such behaviour listed is expressly part of your job duties (e.g. to perform vulnerability scanning) or with prior authorization of senior management.

Enforcement:

For security and network maintenance purposes, authorized individuals within Rocket.Chat may monitor equipment, systems and network traffic at any time. This also includes equipment that you privately own, but use for business purposes. Rocket.Chat reserves the right to audit networks and systems on a periodic basis to ensure compliance with this policy. In case additional software is needed to run on a system or device, you must facilitate the installation of the software and not interfere with its intended function.

Device & Portable Storage Security

Our general policy is that everyone is responsible to secure their workstation by themselves. We do not enforce group policies, software whitelisting, or such. This means in turn that you yourself must be taking a greater amount of care to secure your workstation.

General

Applicable to all devices:

- Keep your workstation in a secure environment (e.g. a locked room or building).
- Always lock your workstation screen when leaving it.
- Store all important or sensitive information on network drives (e.g. GSuite).
- Keep your antivirus and antimalware protection up to date at all times and with daily definition updates
- Keep on updating your operating system and local software to the latest version as soon as it becomes available.
- Run a full anti-malware check at least monthly.
- In case of a virus/malware warning, run a full scan and resolve all findings.
- Use software and OS that still receive security updates from their vendors.
- Do not install software that could cause security risks (e.g. not from official app stores). You are responsible to determine if a new software you are about to install poses a security risk.
- Limit your privileges to what is necessary (e.g. do not run programs with administrator privileges that do not need them).
- When decommissioning a workstation, securely wipe it with DBAN or an alternative (e.g. factory reset) before using it in another way (e.g. selling it).

Mobile Device Specifics

- Install at least one authenticator app to allow for multifactor authentication
- No jailbreak / rooted devices
- Do not store business information outside of apps (e.g. in the download folder), instead keep information inside the native apps and use the app-side browser to view and modify information.

Portable Storage

Portable Storage (e.g. USB sticks, external HDDs) creates some additional risks, especially to availability of information and the risk of theft. That is why portable storage is generally not allowed to be used for Rocket.Chat information. You may use portable storage in limited circumstances when you have custody of the device (e.g. you own it) and it is used:

- For non-sensitive purposes (e.g. marketing material to be shared with a customer on a USB stick)
- For encrypted backups of your workstation
- To extend the storage of your mobile devices

Portable storage you acquire in a used state or not directly from a vendor (e.g. a gift you received, lost & found devices) may never be connected to your devices and should be returned or destroyed because they could be infected with Malware, even after wiping them. Instead of using portable storage, you should always use shared network resources (e.g. GSuite).

Data Classification and Management

Purpose: Ensure that data is classified and handled appropriately and securely throughout its lifecycle, reducing the risk of data breaches, protecting sensitive data, and ensuring compliance.

Scope: This data classification policy applies to all data and to all user-developed data sets and systems that may access these data, regardless of the environment where the data reside (including cloud systems, servers, personal computers, mobile devices, etc.).

The policy applies regardless of the media on which data reside (including electronic, microfiche, printouts, CD, etc.) or the form they may take (text, graphics, video, voice, etc.)

Note: Your private opinion, e.g. what you share on social media under your personal name, is not in scope of this policy. You should always make clear if you are posting in the name of Rocket.Chat or privately, if the context leaves room for ambiguity.

Types of data handled within our organization

There are a variety of data types handled within Rocket.Chat, such as personal data, financial data, intellectual property, confidential data, etc. and for each system or repository within our Asset Register, data must be identified and classified according to the following types:

- Open data: same as public. Contain data that can be seen by anyone.
- Customer - Personal data (PII , PHI, credentials...)
- Employee data -Personal data: refers to employees or contractors data (PII, PHI, benefits, salary,...)
- Financial: contain monetary data (invoices, paychecks, reports, billing information, account details,...)
- Legal data: this includes contracts, agreements and and other legal documents.
- Intellectual property data: contain patents, trademarks, copyrights and other forms of intellectual property.
- Sales and marketing data: contain customer demographics, purchase history, website traffic and social media engagement.
- Operational data: contain information related to an organization's operational processes, system configurations, supply chain management, production.
- IT and system data: contains system logs, user activity and cybersecurity data and IT infrastructure
- Other - cases that do not fall into none of the above categories.

Data Classification and Handling

For in-house and third-party applications

All data stored within our applications (in-house and third-party) shall be classified based on its sensitivity level.

- Public data: This type of data is freely accessible to the public (i.e. all employees/company personnel). It can be freely used, reused, and redistributed without repercussions. An example might be first and last names, job descriptions, or press releases.
- Internal-only data: This type of data is strictly accessible to internal company personnel or internal employees who are granted access. This might include internal-only memos or other communications, business plans, etc.
- Confidential data: Access to confidential data requires specific authorization and/or clearance. Types of confidential data might include Social Security numbers, cardholder data, M&A documents, and more. Usually, confidential data is protected by laws like HIPAA and the PCI DSS.
- Restricted data: Restricted data includes data that, if compromised or accessed without authorization, which could lead to criminal charges and massive legal fines or cause irreparable damage to the company. Examples of restricted data might include proprietary information or research and data protected by state and federal regulations.

The handling requirements for each category consist of access controls to ensure that only authorized users can access and modify the data. Within the Asset Register, the control SPA and asset owner must be indicated and are responsible for granting access to the system or application in question and for reviewing access and privileges periodically.

For Google Docs, refer to Google docs data classification session

User-developed data (Internal files and documents, email content, …)

As a Rocket.Chat employee or contractor, all data created, modified, received or otherwise processed in connection with Rocket.Chat, must be handled confidentially and protected according to the risk related to it. (Confidential Data). Your NDA includes more details on what is considered confidential and what not. We do not distinguish between various levels of confidentiality (like secret, top secret, super secret, ...).

An exception to confidentiality of data applies when the data in question is specifically targeted at a broader audience outside the organization (e.g. blog posts, webinars, public source code). This data is classified as "public". (Public Data).

In regards to handling and marking of data, unless stated otherwise, the creator of data is considered its owner and has to ensure the provisions of this policy are followed. Our general policy is that access to data is denied by default within the company, unless the owner has authorized access to it (e.g. to an individual, to a role or to a group of individuals). This granting or changing of access must be logged and the access control lists regularly reviewed by the owner. This also means we follow the principle of discretionary access control, meaning that owners of data grant access to this data by themselves.

- Confidential data: We generally do not tag or otherwise mark confidential information. Instead we store information in secure repositories and grant access to information only when there is a legitimate need for it ("need-to-know"-access). Unauthorized access must be prevented with the features of the tools you are using. E.g. you should set links to a file with the correct sharing permission. Before sharing confidential data with individuals outside the Rocket.Chat organization, an NDA must be signed. This NDA signature is the responsibility of the HR team for employees and contractors and of the Sales team for potential clients and customers. In case you are in doubt of the existence of an NDA, contact these teams respectively before sharing confidential data. For confidential information shared from us to customers or other external parties (e.g. a slidedeck), you must tag it with the Rocket.Chat logo to indicate its origin and minimize intellectual property infringement. Where the context warrants an additional note to the recipient, you should consider putting a footer like "Confidential material. Do not reproduce" on your document. Secure ways of sharing data (e.g. PGP-encrypted mailing, end-to-end encrypted channels on Rocket.Chat) should be preferred. For sending confidential material via hardcopy, only use legitimate mail services and avoid marking that draws attention to the content of the package.
- Public data: Public data is also not marked specifically, instead it is characterized as being public when you put it on a place where the intended audience can access it (e.g. on our website or a public GitHub repository). To distinguish public data and confidential data, consider where it is being placed. Consider also that all data you put on the web is potentially replicated in other places (e.g. wayback machine, reupload on youtube, etc.) so be sure to check in advance if the data in question is really intended to be public.

Note: Other handling and marking methods depending on tools and systems you use may apply. When you work with specific tools and systems, these systems often come with their own classification schemes (e.g. GitHub Public vs Private Repositories) and mechanisms (access control lists, metadata, etc.). You should use these classification mechanisms in the spirit of this policy and the context of how you use the system.

Please keep in mind that Data minimization is a critical component of our data management policy. We strive to collect and share only the minimum amount of data necessary to achieve our business objectives. We encourage all employees and stakeholders to exercise caution when sharing data and to consider the need for and appropriateness of data sharing before doing so.

Documentation and Approval

You can write and find documentation, procedures and guidelines in different sourcers across the organization, such as

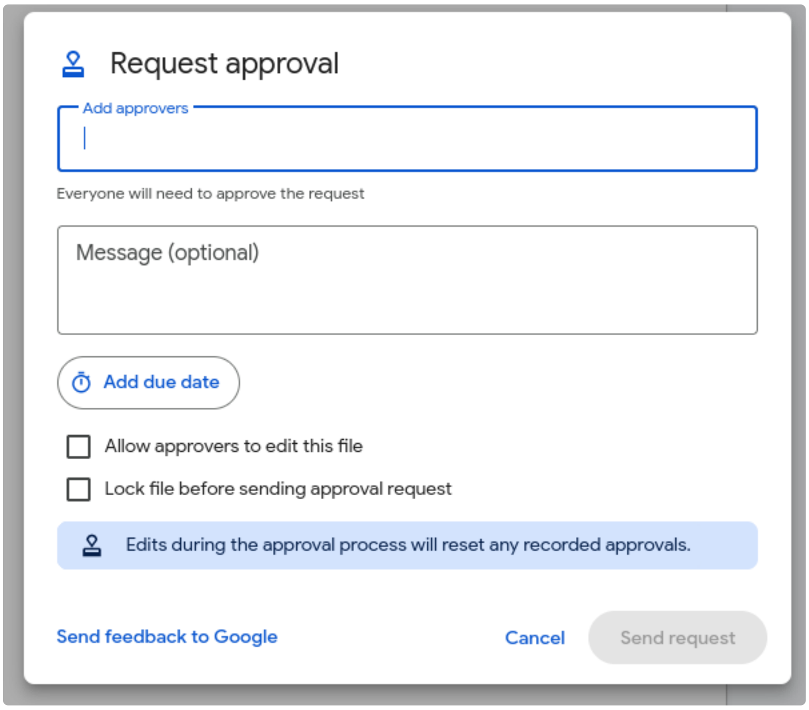
- **Githook**

- **Gitbook**
    - Rocket.Chat Handbook
    - Internal Handbook
    - Rocket.Chat Docs
    - Rocket.Chat Developers
- **Google Drive**
    - Rocket.Chat - All Team

    - Department owned shared drives
    - Your personal Drive

While the approval is automated requested while submitting changes to the gitbook, you need to ask for approval when using the Google Docs for documentation.

You can do it by clicking on **File -> Approvals** and then **Make a request** on the tab opened.



If you don't want the file to be altered after sending the request, check the appropriate box. Remember that any change on the document will reset the approval and make it lost its integrity assurance.

Deletion of data

Once data is considered no longer necessary, it should be deleted. Keep in mind that we are required to keep certain data for a minimum or maximum amount of time (e.g. due to legal or regulatory requirements) - In such cases, we will ensure that appropriate measures are taken to secure the data and minimize the risk of harm to individuals. If you have any questions or concerns about the sharing of data, please send a request to privacy@rocket.chat for review and guidance.

Use secure methods for deleting data, e.g. DBAN .Contact the security team in case you are in doubt of deleting data.

Wiping of customer data and sanitization of assets must follow defined procedures. For laptops, the sanitization shall be done upon return of the asset to the company. For servers, contact the infrastructure team for information on how the process is conducted.

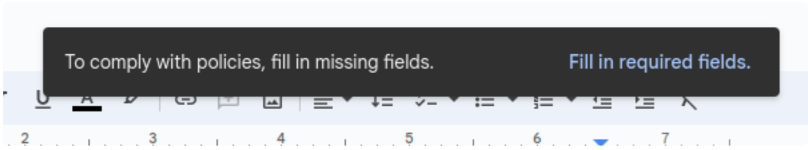
In regards to data stored within third-party organizations, those shall also have appropriate data classification and handling policies in place to protect the data.

Public data generally does not need to be deleted since the risk associated with it is low and our external audience often expects this data to be available (e.g. in our public source code repositories).

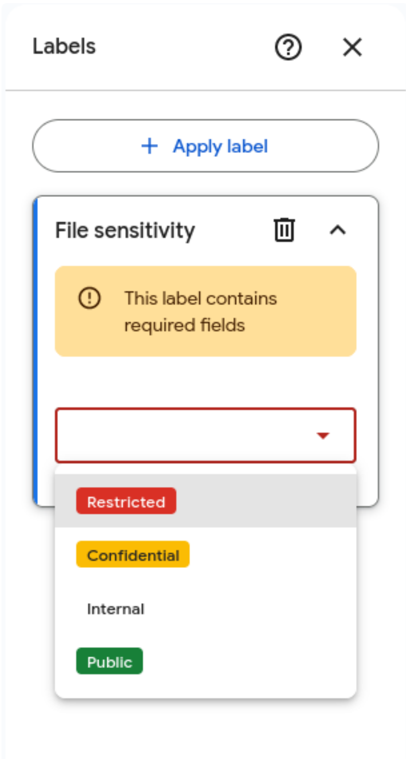
Google docs data classification

How to use labels to classify Google docs

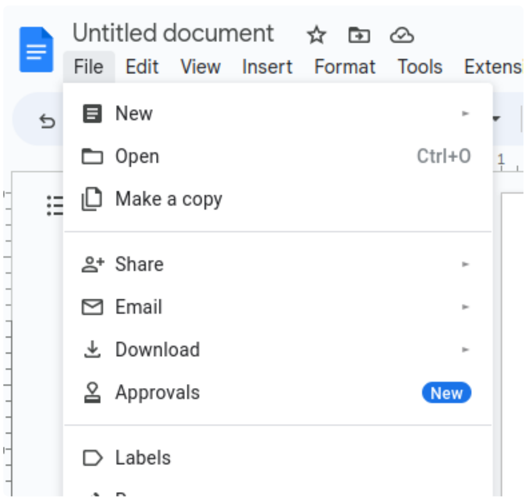
Every time you create a Google doc (the same apply to sheets, presentations, etc...) you will be prompted to fill the File sensitivity label as shown below



By clicking on **Fill in required fields** the label tab will be displayed, where you can add the according label to your document, respecting the classification described here.



You can also open manually this tab clicking on **File -> Labels**



Remote work

Remote Work Security Policy for Rocket.Chat

Purpose

The purpose of this policy is to ensure that Rocket.Chat employees who work remotely maintain the confidentiality, integrity and availability of company assets, data and information. This policy outlines the security guidelines, clear screen and security requirements for remote workers to follow.

Rules

1. Confidentiality: Remote workers must maintain the confidentiality of company data, information, and assets by following the company's data protection policies. This includes keeping passwords and sensitive information secure and not sharing it with unauthorized parties.
2. Theft of assets: Employees who work remotely must ensure that their work equipment and assets are secure and protected from theft. This includes using password-protected screensavers, locking their workstations when not in use, applying full encryption on the working device and reporting any loss or theft of assets immediately.
3. Clear Screen: Employees who work remotely must clear their screens before leaving their workstations. This includes closing all applications, logging out of all systems and locking the screen. This will ensure that confidential information is not visible to unauthorized parties.
4. Security Guidelines: Remote workers must follow the company's security guidelines for working remotely. This includes using secure networks, avoiding public Wi-Fi, using only the company email and calendar, and avoiding the use of personal devices for work purposes.
5. Security Requirements: All remote workers must have up-to-date systems and security software, such as the operation system, anti-virus, firewalls and encryption software, installed on their workstations. Remote workers must also keep their security software updated to ensure that they are protected against the latest threats.
6. Remote Access: Remote workers must use secure remote access solutions, such as virtual private networks (VPNs), to access company systems and data whenever they are not working from their home. Employees must also ensure that their remote access solutions are secure and use strong passwords.
7. Keep printouts with work data to an absolute minimum and destroy them securely once done. In general, most of your work should be done paperless.
8. Compliance: Remote workers must comply with this policy and any other relevant security policies and guidelines. Non-compliance with this policy may result in disciplinary action, up to and including termination of employment.
9. Regular Reviews: This policy will be reviewed regularly to ensure that it remains relevant and effective. Any changes to this policy will be communicated to all employees.

By following these rules and guidelines, Rocket.Chat employees who work remotely can ensure the security of company assets, data and information, and protect the company from security breaches and data losses.

Additional information and recommendations

Here you can find guidelines on how to protect your home network:

How to Set up a Secure Home Network

How to Configure Your Router to Make Your Home Network Really Secure

Cryptography and Key management

Cryptographic requirements are adressed in the other parts of the subpolicies and must follow the general principles as described by OWASP Cryptography in our products will be described in the product documentation.

On the Rocket.Chat servers you use for business purposes and share sensitive business information, you must set your End-to-End-Encryption key when logging in the first time on a new device and encrypt the relevant channels before sharing the sensitive information.

Password & Secrets Policy

- Always use strong passwords, as described e.g. here.
- Always reset your password if you have suspicion of it being compromised.
- Always keep your passwords in a secure and encrypted location like your password manager (preferred, e.g. ZOHO Vault) or your head.
- Never share your passwords with anyone. Credential sharing is not allowed. An exception to this applies if the password is shared by nature.

Shared Passwords

Shared passwords & secrets should only be used, if a personal password can NOT be used. Always prefer using your own passwords (tied with your own account/credential). Shared passwords must be stored in an approved secure and auditable password storage system. Our current standard is ZOHO Vault, its integrations are approved (e.g. the browser extension).

Shared Passwords must:

- Abide our password policies (complexity, length), unless the target system/use case does not allow this or prescribes a different standard
- Have one or multiple owners, default owner is the creator of the shared password. In Zoho, this is called “Authorizer” or “Owner”.
- Always be maintained in the central storage system. Do not update passwords and keep an outdated password in ZOHO. ZOHO is single source of truth.

Shared Passwords SHOULD:

- Be put in folders (ZOHO: “Chambers”), with a pre-configured set of persons with access. This makes it easier to manage access control.
- Not be exported out of Zoho.

When a person leaves the company, he must transfer ownership of the shared password to a successor. Click on “more actions” → “Transfer Ownership” in ZOHO.

Encryption Keys

Encryption Algorithm

Rocket.Chat requires the use of strong encryption algorithms for protecting sensitive information. Encryption algorithms must meet the industry standards and best practices, as outlined by OWASP Cryptography guidelines. The type, strength and quality of the encryption algorithm used must be appropriate to the level of sensitivity of the data being protected.

Encryption for Mobile/Removable Media and Communication Lines:

All information transported by mobile or removable media devices or across communication lines must be encrypted using a secure encryption algorithm. Rocket.Chat will ensure that all endpoints, including mobile devices, comply with this policy.

Key Management

Purpose

The purpose of this policy is to establish guidelines for the management and protection of encryption keys used in Rocket.Chat systems. The policy aims to ensure that cryptographic keys are generated, stored, protected, and distributed securely and effectively.

Scope

This policy applies to all encryption keys used in Rocket.Chat systems, including but not limited to, symmetric encryption keys, asymmetric encryption keys, and digital certificates.

Key Management Practices

Rocket.Chat recommends the following key management practices:

- **Key Generation:** All cryptographic keys must be generated using a secure random number generator and with sufficient entropy.
- **Key Distribution:** Cryptographic keys must be distributed securely using a secure communication channel.
- **Key Storage:** Cryptographic keys must be stored securely and only authorized personnel should have access to them. The storage mechanism must use strong encryption and access controls to prevent unauthorized access, modification, or disclosure.
- **Key Usage:** Cryptographic keys must be used only for their intended purposes and in accordance with the policy and best practices.
- **Key Revocation:** Cryptographic keys must be revoked immediately if they are lost, compromised, or no longer needed. The revocation must be communicated to all parties involved in the key exchange.
- **Key Backup and Recovery:** A backup and recovery plan must be in place for cryptographic keys. The plan should include a process for backing up keys to a secure location and testing the recovery process to ensure its effectiveness

Roles and Responsibilities:

Rocket.Chat will ensure that the policy is implemented by assigning roles and responsibilities to its employees. The following roles and responsibilities will be assigned:

- Implementation of the policy: The Security Officer (SO) will be responsible for implementing the policy and ensuring its effectiveness.
- Key Management: Each person is responsible for the management of the keys they generate for personal use. For team or company-wide use, the manager of the team requiring the key is responsible for it's management.

Authentication and Password policies

Authentication Policy

Purpose

The Authentication Policy for Rocket.Chat outlines the procedures and guidelines that all employees of the organization must follow to authenticate their identity while accessing Rocket.Chat and its assets. This policy is designed to ensure the security of our organization’s data and communication systems.

Access

Access to confidential Rocket.Chat data is only allowed after successfully and securely authenticating an individual. Your main account is your rocket.chat email account and serves as your main digital identity. You will receive your account during your onboarding process as well as other, potentially needed digital identities.

You should always use your firstname.lastname@rocket.chat identity. Exceptions apply when you are testing out a service or you specifically want to access the service under a pseudonym. You may not circumvent authentication or use different identities unless this is specifically part of your duties.

Authentication Methods

In terms of authentication methods, you should always opt for using SSO/SAML authentication where possible. Since your identity is tied to a Google account, you can also click on the "Sign up with Google" button or similar phrasing, in case SAML/SSO is not available. If you get an error when authenticating via SAML or SSO, contact the person who invited you to enable it properly.

2-Factor (2FA) or Multifactor (MFA) Authentication is required before accessing critical assets and will be set as mandatory there. For non-critical assets that allows 2FA we still highly recommend it to be set up, since it grants a higher level of security.

For systems that do not support Google Sign Up or SSO/SAML, follow the following Password Policy while creating a password to access the service or account.

Password Policy

While creating passwords to access company assets we recommend the employees to use Password Wallets, preferred Zoho Vault (using your rocket.chat email to access Zoho).

Set up a strong Master Password your wallet and enable 2FA. Refer to the Password Creation Rules.

Remember also to change your password periodically. In the case of a password leak or exposure, change it immediately and report the fact to the Security team.

Systems that allow password policy enforcement will be configured to expire password after 90 days and only accept passwords that comply with the Password Creation Rule below:

Password Creation Rules

- Passwords must be at least 12 characters long and include a mix of uppercase and lowercase letters, numbers, and special characters.
- Passwords must not contain any dictionary words, personal information, or easily guessable patterns.
- Passwords must be unique and not used for multiple accounts.
- Passwords can not be reused in the same system.

Shared secrets

You should always avoid using shared accounts, but in the extreme case where it is needed (or if you need to share another kind of secret among a team or peers), do it using the Share Password feature of Zoho Vault. **NEVER** share a password or secret in plain text or via any kinda of communication platform, even Rocket.Chat.

If it is impossible to use the Share Password feature from Zoho Vault and you really need to send the secret via a communication platform you can use specific tools such as PwPush. Remember to push only the secret, without any other context about where it will be used or event the username, and set the link with the most restrict expiration settings possible.

Access Control

This session establish guidelines for requesting access to sensitive or internal systems within the organization

Link to the Access Request form

Access to sensitive or internal systems is critical for the security and confidentiality of Rocket.Chat. This policy and procedure help to ensure that only authorized individuals have access to these systems and that access is granted based on job responsibilities. It is the responsibility of all employees to follow this policy and report any suspected security breaches.

Scope

This policy applies to all employees, contractors, and third-party vendors who require access to sensitive or internal systems within the organization.

Policy

Access to sensitive or internal systems must be requested through the company's Security department.

All requests for access must be approved by the employee's manager and the Security department.

Access to sensitive or internal systems will only be granted to authorized personnel who require access to perform their job responsibilities.

Access to sensitive or internal systems will be reviewed periodically to ensure continued access is necessary.

Employees who leave the organization must have their access to sensitive or internal systems terminated immediately.

Procedure

Requesting Access

- The employee must complete an access request form, which can be obtained in the link in the top of this page.
- The employee's manager must review and approve the request.
- The Security department will review the request and verify the employee's need for access.
- The Security department will grant access to the requested systems if approved.

Note: For new employees (first access) the HR team will be responsible for grating access to a set of systems and register the access request on behalf of the employee.

Reviewing Access

- Access to sensitive or internal systems will be reviewed periodically to ensure continued access is necessary.
- Managers must notify the Security department of any changes to an employee's job responsibilities that may impact their need for access to sensitive or internal systems.
- If access is no longer necessary, the Security department will revoke access to the systems.

Termination of Access

- When an employee leaves the organization, the employee's manager must notify the Security department immediately.
- The Security department will revoke the employee's access to sensitive or internal systems.
- All company's equipments (when applied) and data hold by the employee must be returned to the company.

Review of Accounts and privileges

Purpose is to periodically review who has access to what and perform changes if necessary.

- Frequency - quarterly

- Frequency - quarterly
- Scope: Assets classified as Tier 1 within Asset Register 2023. (Tier 1 is composed by Rocket.chat critical systems such as Core Development systems, databases, Infrastructure providers, Finance and critical operational systems).

Roles and responsibilities

- Engineer Manager from Security team: responsible for periodic review with asset owners or designated person to make sure the task is being executed.
- Owner or designated person - access the system(s) and check for the list of all users to:
  - 1) Verify if all member are active rocketeers.
  - 2) Check if their level of access is appropriate to their use/role (regular user/admin/ ...).
  - 3) Make the removal or changes as needed.
  - 4) Update the checklist to confirm the review was done.

  For Tier 2 and 3 applications, the review of access and privileges shall be done annually by the asset owners or designated person.

Changes Management

Rocket.Chat code

Purpose

The purpose of this document is to outline the process for managing technical changes to the rocket.chat software versions (major release, minor release, security release or patch release), & Infrastructure as a code, in order to ensure that changes are made in a controlled and consistent manner and that any risks associated with changes are identified and mitigated.

Scope

This change management plan applies to all changes to the (major release, minor release or patch release), including changes to software, documentation, and procedures.

Procedure Review:

This procedure should be reviewed at least annually.

Last review on Feb/28/2023

Acronyms & Definitions:

PR = Github Pull Request

Develop Branch = Branch used for the development environment containing all approved PRs. All PRs merged into the development branch are applied automatically into our develop environment for applicable testing.

Open Server = Rocket.Chat environment available for internal users and community. Also our beta tests environment.

Change Management Team: The change management team is responsible for overseeing the change management process, and includes the following members:

- Change Manager (CM): Rodrigo Nascimento (CTO); Is responsible for assessing the impact of a change, to identify any risks, and make a recommendation for approval or rejection of a release.
- Delegated Change Manager (DCM): Anyone in the organization that is listed on the letter of delegation from the Change Manager; Is a delegation from Change Manager and has the same responsibilities. Letter available at: https://handbook.rocket.chat/departments-operations/security/security-policy/changes-management/rocket.chat-code/delegation-letter
- Code Owners (CO): Members from github teams as assigned on https://github.com/orgs/RocketChat/teams; Responsible for checking modifications to code that impact a given github repository and its code.
- Engineer from internal squads: Any engineer from rocket.chat team that is listed on https://theorg.com/org/rocket-chat/org-chart .
- QA Squad: Any member of internal squads with a QA role.

Change Proposal and Approval Process:

1. All proposed changes must be submitted as a GitHub Pull Request (PR) and follow its General Instructions and Handling procedure (https://handbook.rocket.chat/departments-operations/research-and-development/engineering/development/pr-general-instructions-and-handling)
2. A peer review is required for all the submitted PR following the documented Review Guidelines(https://handbook.rocket.chat/departments-operations/research-and-development/engineering/development/review-guidelines). PR approval or comments will be placed on github.
3. Code Owners review will be required in case the change impacts multiple areas of the code and will also be performed based on our Review Guidelines (https://handbook.rocket.chat/departments-operations/research-and-development/engineering/development/review-guidelines). PR approval or comments will be placed on github.
4. After Peer Review and/or Code Owners review, an approved PR can be merged into the development branch.
5. All changes of a given period merged into the development branch, will be bundled into a release-related PR for Major, Minor, Security or Patch Release Pull Request on Github by any engineer from internal squads. PS: Classification for different releases is available at: https://handbook.rocket.chat/departments-operations/research-and-development/release-cycle
6. Change Manager or Delegated Change Manager approval is required on any given release-related PR.
7. After approval a release-related PR will be merged into the Master branch and can become available for our customers on self-hosted and SaaS products.

Change Implementation and Testing:

1. All changes must be tested before they are implemented, in order to ensure that they do not have any unintended consequences.
2. All PR will go through our Github CI automated tests and verifications.
3. PR will be tagged with QA Tested in case they are verified & approved by the internal QA squad or QA Skipped in case they are verified & approved by Engineer from internal squads and don't need QA formal validation.

Change Communication and Documentation:

1. All approved changes must be documented in the change log on github, and can be viewed at https://github.com/RocketChat/Rocket.Chat/commits/develop
2. Change records must be retained for a minimum of 2 years.
3. All applicable stakeholders must be informed of the changes approved and bundled on a release, with details being available at https://github.com/RocketChat/Rocket.Chat/releases and a message being posted at open.rocket.chat #rocketchat-releases.

Change Rollback and Reversal:

1. In case a rollback is needed due to problems or issues, a rollback plan must be developed by engineers from the internal squad and tested.
2. The rollback plan must be reviewed and approved by the Change Manager or Delegated Change Manager before the change is implemented.
3. If a change needs to be rolled back, the rollback plan must be implemented immediately, and all the affected stakeholders must be informed of the rollback and its impact at open.rocket.chat on #important channel.

Delegation letter

Delegation letter for Change Management Process

Valid until 28/02/2024

Delegate Change Managers (DCM): Guilherme Gazzo (Head of Architecture); Diego Sampaio (Staff Engineer); Aaron Ogle (Head of Infra); Douglas Gubert (Engineer Manager);

I, Rodrigo Nascimento (CTO), am writing to delegate change management responsibilities for the above mentioned Delegate Change Managers (DCM).

With this delegation, they are also allowed to assess the impact of a change, identify any risks, and make a recommendation for approval or rejection of a release.

I am confident that DCM listed above have the skills and expertise necessary to successfully manage change activities for Rocket.Chat on all capacities listed on Change Management Plan. If you have any questions or concerns, please do not hesitate to contact me.

Sincerely,

Rodrigo Nascimento, CTO, Rocket.Chat

Supplier Relationship

This policy applies to the security and compliance of supplier relationships. A supplier relationship refers to the interaction and collaboration between a company or organization and Rocket.Chat. It encompasses the various ways in which our company manages and interacts with suppliers, such as procurement processes, contract negotiation, quality management, communication, and collaboration on innovation and product development. Maintaining a secure supply chain is important because often vulnerabilities and risks are introduced through supplier relationships.

Suppliers can be SaaS providers, hardware suppliers and similar.

Contracts & Service levels:

Relationships with suppliers must be based on written agreements/contracts. Such contracts must include provisions on information security when necessary. Service levels of suppliers must be agreed upon and monitored, e.g. by monitoring uptime reports, quality of service, and in case the service does not meet the expected level, the supplier must be notified to remediate the issues. Changes to the provision of services by vendors, including changes to agreements, must be recorded (e.g. a contract amendment).

Supplier access & privacy:

Suppliers accessing or processing Rocket.Chat data must be subject to an NDA or other confidentiality clauses. They must follow either our privacy policy or have their own, legally compliant privacy policy.

For cases when supplier needs to access Rocket.Chat information (e.g a vendor that needs to process data from some internal system), then the **Vendor Risk Assessment Questionnaire** must be sent to the supplier or vendor.

The Vendor Risk Assessment Questionnaire is a set of questions that is used by a Rocket.Chat to evaluate the security posture of suppliers. The purpose of the questionnaire is to assess the level of risk associated with working with a particular supplier and to identify any potential security vulnerabilities that may exist in their systems, ecosystems or processes.

Our questionnaire contains questions covering topics such as Access Controls, Compliance, Incident Management, Risk Management, Vulnerability Management among others.

The questionnaire template can be found here.

- Make a local copy of the questionnaire.
- Send to the supplier as attachment.
- Once responded by the supplier and sent back, the questionnaire must be made available to the security and compliance teams for risk assessment. Please mention the purpose of the relationship with the supplier.
- The Security and Compliance teams will raise flags if necessary and a proper contact with the supplier must be made to notify about Rocket.Chat's concerns.

Note: If you have questions whether the questionnaire should be sent to a vendor or not, please contact Compliance or Security teams.

Supplier compliance:

Supplier compliance is assessed on a risk-based approach and against the requirements of our security policies. Suppliers must demonstrate the same level of compliance for their supply chain.

Supplier Monitoring:

For suppliers with certifications we will evaluate on a yearly basis if those certifications remain valid (e.g ISO or SOC2) as well as their privacy policies.

Business Continuity and Disaster Recovery

Purpose

The purpose of this plan is to ensure the continuity of Rocket.Chat operations in the event of a disaster or disruptive event. The plan outlines the steps to be taken to minimize the impact of the event on Rocket.Chat operations, ensure the safety of personnel, and enable the timely recovery of critical business functions.

Scope

This plan applies to all Rocket.Chat operations and systems, including but not limited to, servers, databases, network infrastructure, and personnel.

Disaster Recovery Team

The Disaster Recovery Team will be responsible for implementing this plan. The team will consist of key personnel from Security, Operations, Management, and the owners of the system affected. The team will be responsible for:

- Activating the plan in the event of a disaster or disruptive event.
- Assessing the impact of the event on Rocket.Chat operations and systems.
- Initiating recovery operations to restore critical business functions.
- Coordinating with external agencies and vendors as needed.

Disaster prevention:

Disaster prevention is everyone´s responsibility. This means that every employee must actively prevent disasters from occurring and report potential risks of a disaster to management. Most controls to prevent disasters are taken on a system level by the respective system administrator and will be performed against a system specific control catalog (e.g. backup configuration). Since many of our systems rely on third party providers, following our policies for third parties is critical. Disaster Prevention controls include:

- **Preventing vendor lock-ins**
- **Trusted partners**
  We should always choose partners that provide an adequate level of security (e.g. SaaS providers with high reputation)
- **Storing data offsite and off-client**
- **Backup and Recovery**
  Regular backups will be taken of all critical data and systems. The backups will be stored offsite in a secure location. The recovery process will be tested regularly to ensure its effectiveness.
- **Redundancy**
  Redundant systems and infrastructure will be implemented to ensure continuity of operations in the event of a system failure.
- **High Availability**
  Critical systems will be designed for high availability to minimize downtime.
- **Cloud Services**
  Cloud services will be used to provide redundancy and disaster recovery capabilities.
- **Emergency Communications**
  Emergency communication protocols will be established to enable communication with employees, customers, and vendors in the event of a disaster.

Business Impact Analysis

A Business Impact Analysis will be conducted to identify critical business functions, dependencies, and recovery time objectives (RTO) and recovery point objectives (RPO) for each function.

Rocket.Chat maintains a list of all systems, including a rating of their criticality on our business processes. This criticality is mostly based on tolerable downtime. The criticality ratings are defined in specific DR documents. Criticality ratings to a system may be adjusted on a case-by-case basis where the circumstances justify the adjustment. Rocket.Chat also runs a risk management program to identify and manage risks, including risks of a disaster occurency.

You can find the asset list here.

Risk Assessment

A Risk Assessment will be conducted to identify potential hazards and threats to Rocket.Chat operations and systems. The assessment will include a review of physical security, environmental risks, and cyber threats.

Disaster Recovery:

In case of a disaster, we will form an incident response team consisting of the respective members of our management team, security and other individuals, depending on the type of disaster. The members of the team will communicate using Rocket.Chat - or where this is not possible - email or phone. We will inform all affected employees via the Rocket.Chat channel "important" or others where relevant. In case the disaster has taken down the rocket.chat servers, we will notify via email or - where warranted - contact you via the phone numbers you have given us during on-boarding. The incident response team will also ensure that affected customers are informed via the proper methods.

Refer to the the Incident Response Plan

Testing:

Annually, we test our business continuity and disaster recovery capabilities. The scope and method of testing are related to our risk management process and decided by management. The results of these tests are shared in the company and may lead to updates to this policy.

Awareness and Training

Awareness means putting someone´s attention on security challenges. Training means giving people the right level of security skills for their job.

Awareness

At Rocket.Chat, we can build on a tech-savvy team that has a broad knowledge of security topics and specializations. Therefore we focus on raising an awareness on new things that happen. Goal: Keep all members of Rocket.Chat appraised of new and current developments in the security landscape

We count on the widely respected KnowBe4 platform, from Kevin Mitnick, to build our Security Awareness program.
The program is focused on 2 main steps: training and security tests

Training

Goal

Provide all rocket.chat members with the security skills fitting to their job profile and career path

Basic Security training

We provide for every Rocketeer a Basic security awareness training that can be accessed in https://training.knowbe4.com, accessed using the corporate google account.

Content

The content of this training is cover many aspects about security threats that we may be target by, such as Email phishing, credentials compromising, network threats, etc..

What you should know about the Basic Security

- It is **mandatory** for all Rocketeer, no exceptions.
- It is required to finish them to keep your access to Rocket.Chat services, including Google Workspace, Jira, etc...
- You have 30 days after you enrollment to finish the training
- After the due date you may have your accesses suspended until you finish the mandatory training.
- If you find any issue accessing or completing the security training, reach out to any security team member.

Additional trainings

We also provide additional security trainings specific for areas or sectors in the company, for example:

- Secure coding and best practices for engineers and developers
- C-level attacks awareness for high management
- PII data handling to People and Data team

Security tests

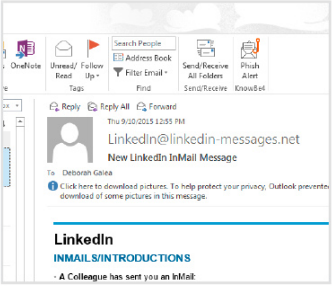
We also perform periodically and unwarned internal security tests in order to assess the efficiency of the training and collect valuable metrics that help us to provide more suitable content for next trainings.

The tests may take the shape of a simulated phishing email, simulated SMS phishing or phone call.

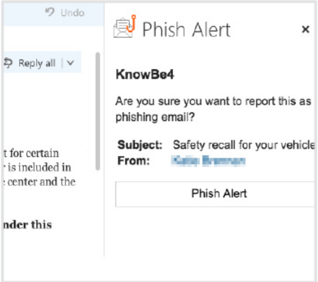
How to report a phishing email

In rocket.chat we use a phishing report integration from KnowBe4, called Phish Alert Button. It is a orange hook add-on integrate with your corporate Gmail that is already pre-installed in every platform that you access your rocket.chat email.

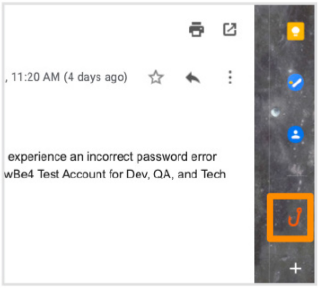
Outlook Toolbar
Adds a Phish Alert button for your users



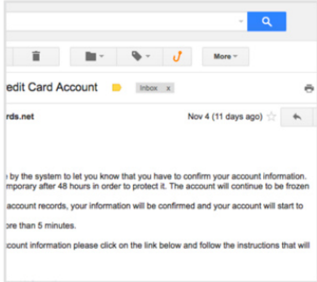
Microsoft 365 Add-in Pane
Adds a Phish Alert button for your users

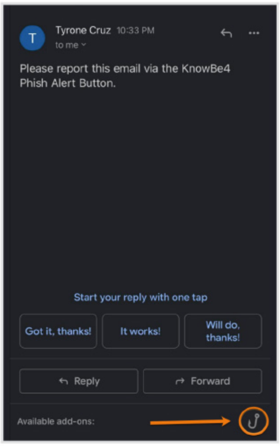


Gmail Add-On
Adds a Phish Alert button for your users

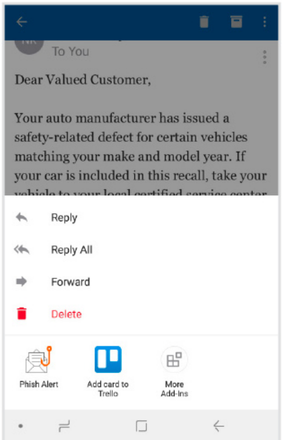


Gmail Extension
Adds a Phish Alert button for your users

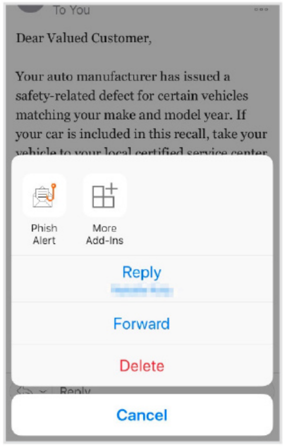




Gmail Mobile (Android)



Outlook Mobile (Android)



Outlook Mobile (iOS)

Always use the integration to report suspected phishing email. If it a simulated email you will view a message congratulating your for finding out the simulated campaing. If it a potential real phishing email the email will be send to the security team for further analysis.

Playbooks

Playbooks for security process and operations.

Logs, alerts and incidents.

Security Logs ingestion and review

Security Alerts

Incident Management

Vulnerabilities

Vulnerability Management Process

Bug Bounty / Hackerone

Vulnerability Reports & Disclosure

Pentesting

Internal

External

Projects

Task & Project Management

Code Analysis

Static Code Analysis

Awareness & Training Plan

Server investigation

When contacted about a potentially rogue server, i.e. a server used for criminal purposes, we follow our internal Standard Operating Procedure here.

Law enforcement inquiries are subject to our law enforcement guidelines.

Reporting

On a monthly basis, the security team provides a metric sheet to management and presents in the all-hands meeting. The sheet can be found in GDrive. On a weekly basis, the security team reports the status of the current tasks and issues in the all-hands meeting as per an Clickup export and addition to the newsletter.

Vulnerability Management Process

Purpose of this page

This page describes how Rocket.Chat fixes vulnerability in its products and it is divided as follows:

- **Vulnerabilities Data Source** shows what are the places we collect vulnerabilities from.
- **The process of vulnerability management** describes what is the current flow for a given vulnerability.
- **Participants in this process** shows the schedule we put together to make engineers to fix vulnerabilities.

Vulnerabilities data source

Today we have 8 vulnerability data sources where we gather the information that we need to manage our vulnerability management process. These sources are tools or manual analysis that can be generated by our internal offensive security team, external researcher or third-parties that we hire on an annual basis to help us identify possible vulnerabilities.

Here are some of our current vulnerabilities data source:

1. Tenable.io (Infra)
2. Trivy (Container)
3. Kube-hunter (K8s clusters)
4. Hackerone (External environment)
5. Internal Pentesting (Applications + infrastructure)
6. Snyk (Applications)
7. Third-parties companies (Applications + Infrastructure)
8. Prowler (AWS environment)

When we're dealing with manual reporting like hackerone, internal pentesting or third-parties companies our offensive security team takes action to analyze the data that has been generated to triage and check if it makes sense for our current situation and if the vulnerability is confirmed then we add in our internal pipeline to be handled.

If the vulnerabilities come from tools, we have implemented an integration where some of the tools are connected with our internal process management (Jira) platform where the vulnerabilities are automatically added to the list when a scanner finds it. This process is still being improved and our goal is to have every scanner integrated with our vulnerability list to avoid manual process of getting vulnerabilities from the scanner and add to Jira automatically, avoiding the possibility of losing any vulnerability in the process.

The process of vulnerability management

Given a vulnerability (regardless if it was found manually or with a tool's support) the first step is to perform the triage of the vulnerability and to decide whether the vulnerability is a code issue or a dependency problem that we have in our project. Being a code issue, the development of the fix starts with one of the developers that is part of the rotation program (detailed later in this page). After the developer fixes the issue, there is a step related to the security team to perform an initial test on that fix. If the issue is fixed, a code review is performed by another developer or by a member of the Architecture group at Rocket.Chat. Only after that the QA team is able to perform a validation of the functionality, also making sure that no other functionality is broken.

Once we make sure the vulnerability is fixed and is release as part of our release process, we also take actions to publicly disclose the vulnerability as well as update our hall of fame with the name of the researcher, if that was the case.

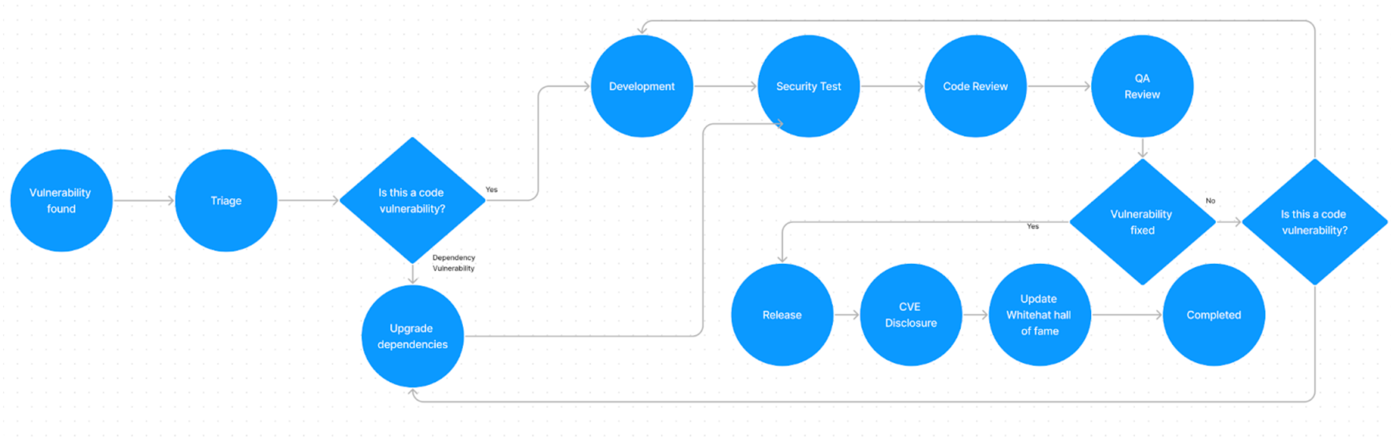


Figure 1 - Vulnerability process at Rocket.Chat

Today we use Jira as our main tool to manage our current vulnerability management process and inside this tool we have a kanban board that contains as columns the steps described above.

Participants in this process

The following are the ones who participated in the whole process of fixing vulnerabilities:

Security team: The offensive team is responsible for managing the sources of vulnerabilities and to perform their triage. They are also responsible for moving the Jira tickets through the majority of the columns of the board.

Architecture Team: Architects are responsible for providing guidance to developers on how to fix a specific vulnerability from a code understanding and perspective.

Engineers: The software engineers are the ones who are going to fix the vulnerabilities with inputs from the architecture and security team members. Engineers also review fixes from each other.

QA: QA Engineers are responsible for testing if the solution has fixed the vulnerability as well as making sure that no other functionality of the product has been affected.

Rotation schedule for fixes

Week	Frontend	Backend
14-Nov-2022	Tiago Evangelista	Luciano Pierdona
21-Nov-2022	Tiago Evangelista	Luciano Pierdona
28-Nov-2022	Tiago Evangelista	David Alen
5-Dec-2022	Tiago Evangelista	David Alen
12-Dec-2022	Yash Rajpal	David Alen
19-Dec-2022	Julia Forresti	David Alen
26-Dec-2022	Holidays	Holidays
2-Jan-2023	Pedro Rorato	Matheus Barbosa
9-Jan-2023	Pedro Rorato	Matheus Barbosa
22-Feb-2023	Gabriel Henriques	Rafael Tapia

Rocket.Chat thanks each one who participated in this process of making our products even more secure.

Security Logs ingestion and review

Logs are collected from various sources, such as, applications running in Kubernetes clusters, servers, Google Workspace apps, etc... Here you can find deatails about how logs are collected, processed and reviewed.

Collection of logs:

Rocket.Chat logs are collected from various sources and centralized in Elasticsearch. The collecting process may happen in two different ways:

1. Through the Elastic Agent native Integration
   Elastic agent has several native integrations with different apps and system that allows us to collect, parse and ingest logs in a transparent way.
2. Reading information from a custom file.
   For those applications that are not contemplated in the elastic agent pool of integrations we can read a log file defined in a custom ingesting pipeline. While defining the pipeline you must also determine how the logs will be parsed.

Filtering and normalization:

Logs are filtered and normalized to remove unnecessary information and convert data into a standardized format. This process is important to assure that meaningless logs are not being stored and using processment and storage that are useful for important security logs and events.

Parsing and Enrichment:

Parsed logs are enriched with additional context to provide more insights, such as user IDs, device types, or geo-locations.

Threat Detection:

Security rules are defined and implemented to detect potential security threats in the log data.

Alert Generation:

When a security rule is triggered, an alert is generated and sent to designated recipients for further investigation.

Investigation:

The recipients of alerts investigate and triage potential security incidents based on the available information.

Incident Response:

If a security incident is confirmed, the appropriate incident response plan is executed.

For more information refer to the internal Incident Response plan

Reporting and Analytics:

Reports and analytics are generated from the log data to provide insights into security trends, compliance, and risk management.

Logs review and retention period.

The review process of SIEM logs stored in Elasticsearch for Rocket.Chat is an ongoing process that involves continuous monitoring, analysis, and improvement to ensure the security and compliance of the Rocket.Chat environment.

The review process involve checking the analytics and model that define the expected amount of logs coming from each system. If any inconsistence is found an alert is generated triggering a deeper review process.

The default retention period is set to 13 months:

- <7 days in Hot Data Tier
- >7 days <14 days in Warm Data Tier
- >14 days <3 Months in Cold Data Tier
- >3 months <13 months in Frozen data tier
- >13 months in snapshots (not searchable, takes more time and effort to be accessed)

Alerts and Incident Management

Security Alerts

Alerts for security events will be shown in the #security-alerts group. The message format is

`SIEM ALERT -- <type of alert> - [<severity> or <score>] <message>. Check <link to the alert>`

The type of alert can be **ANOMALY DETECTED **or **STATIC RULE.**

Static rule:

When a pattern found in the logs being ingested to the SIEM matches one of the static rules pre-defined, this type of alert is fired. The severity can be **Low, Medium, High, **and **Critical **according to the impact.
The current SLA to triage each alert, according to the severity, is the following

Severity	SLA
Critical	< 1 day
High	< 2 days
Medium	< 5 business days
Low	< 10 business days

The instructions on how to perform the triage and investigate each alert can be found on the alert page (link in the message), inside our SIEM platform.

Anomaly detected:

We have several Machine Learning jobs running that search for anomalies in the data feeds being ingested. If an anomaly is detected it can trigger a Rule that will fire the alert (sometimes a single anomaly is not sufficient to trigger a rule).
The anomaly can be evaluated by **Severity** or **Score. **Our current SLA to define if an anomaly is valid or not is the following

Severity // Score	SLA
Critical // Score >= 80	< 2 days
High // 50 <= Score < 80	< 3 days
Medium // 20 <= Score < 50	< 5 business days
Low // Score < 20	< 10 business days

Incident Management

We follow the following incident management process:

1. Identification: A security incident is every event that could potentially impact the confidentiality, integrity or availability of our information assets. Examples include: improper access control, lost devices, service outage.
2. Logging: Once we have identified a potential security incident (e.g. by an alert, by an issue or a customer complaint), we log it in our task-tracking tool. Teams can decide to use different tools to track their incidents as long as the following steps are adhered to. We have the following options: Clickup, ZOHO, GitHub private repos. You should link to background information, e.g. a support ticket if you put the incident in Clickup.
3. Assignment: As a next step it must be assigned to the proper team and added to the project "Incidents & Vulnerabilities". Also add the source of the incident as a tag (e.g. "support"), if possible. If you are unsure to whom to assign it to, assign it to the security lead. Make sure the assignee can access all relevant information. Common assignees are: Cloud team for all cloud-related incidents, support team for supporting Enterprise customers, security team for all other incidents (e.g. application vulnerabilities reported).
4. Categorization: As a next step, the incident is triaged, meaning: it gets evaluated for its priority: low, medium or high. This classification link can be used as a guideline, S1 means "high", S3 means "low". Also set a proper due date for the incident to be resolved. We want to resolve incidents as quickly as possible, but to manage risks effectively, we focus on high priority incidents first. External criteria like customer specifications of priority or CVSS-levels are taken into consideration in the triage process, but can be modified where the context allows. Triaging may also result in the finding that no incident exists. If the incident cannot be resolved at this stage, it must be re-assigned and potentially escalated. Interested internal parties should be added as "followers", so they get notified.
5. Investigation: Once in a stage where the right person is assigned to the incident, it gets investigated and search for possible solutions begins. Solutions should always target the root cause, but sometimes finding a quick hotfix and solving the deeper, complicated root cause afterwards may be the appropriate action. Other teams and management can be involved by the person responsible to investigate the incident. Keep a record of the investigation process.
6. Resolution: Resolution includes implementation, testing, and recovery as well as reaching out to other parties necessary, e.g. in case of a privacy incident to the authorities. We have a list of notification and who notifies them here. Before advancing, the affected user or customer must also be in agreement that the incident has been resolved.
7. Closing: Now the incident can be closed. The assignee should ensure that the initial classification details are accurate for future reference and reporting. If the incident was about a vulnerability, follow up with vulnerability disclosure (see below).
8. Lessons Learned: Re-occuring incidents or those indicating a deeper, critical root cause, may be analyzed as part of a problem management process. To start problem management, create a task in Clickup
or the tracking tool of your choice. For lessons learned, to get more detailed log information on the services we run, contact the cloud team for access.

Our SLA for incidents is as follows:

Time to first response: maximum 5 days, 1 day for critical incidents Time to triage: 10 days Time to resolution: High - 30 days, Medium - 60 days, Low - 90 days

Vulnerability Reports & Disclosure

Bug Bounty / Hackerone

HackerOne is a service that allows us to interact with **external **parties (e.g. white hat hackers) to collect, manage and disclose vulnerabilities that are discovered by them. HackerOne is managed by the security team. All members of Rocket.Chat can request access if they want or should collaborate directly with the external party. Hackerone runs parallel to Clickup, which is used for **internal **collaboration.

Vulnerability Reports & Disclosure

We have an established vulnerability management program that handles all layers of our application and infrastructure by using 8 main data sources, including our HackerOne program, internal pentest, vendors pentest, and tooling that runs vulnerability assessment scans in our ecosystem.

Secondary channels are:

- Reports or questions come in from customers through our Support Desk or other direct channel.
- Issues opened on the public issue trackers. The security team can not review all new issues and relies on everyone in the company to identify and label issues as `~security` and mention security team members issues.
- Issues reported by automated security scanning tools

For reported vulnerabilities:

- Open a task in Clickup on the `vulnerabilities` board as soon as a report is verified and reference the original report.
  - If the vulnerability was reported via a public issue on Github, remove it and refer the reporter to our email adress or hackerone. Still open a clickup task, in case the reporter does not respond.
- With the ClickUp task opened, copy the task ID (the final part of the URL: app.clickup.com/t/<taskid>) and add it as a reference on the HackerOne report.
  - On the top part of the report, click on the Edit button in front of the References field
  - Select Create Issue, Manual Integration, and paste the Task ID in the Ref ID field.
- An initial determination is done by the security team as to severity and impact. Never dismiss a security report outright. Instead, follow up with the reporter, asking clarifying questions.
- Remember to prepare patches, blog posts, email templates, etc. on or in other non-public ways even if there is a reason to believe that the vulnerability is already out in the public domain (e.g. the original report was made in a public issue that was later made confidential).

Our current SLA to deal with vulnerabilities are:

- **Critical:** 14 days
- **High:** 30 days
- **Medium:** 60 days
- **Low:** Best effort unless risk accepted

If you want to understand how our vulnerability management process works here is a document with the details

To prepare a Security Fix

Security Fixes are developed by the proper dev teams.

> ⓘ **For our development teams: **A dedicated step-by-step guideline of the policy aspects relevant for you can be found here.

Fixes must be made available as per our support policy.

Security Fixes must not contain keywords such as "exploit", "hack", or similar and should be phrased technology-neutral. We want to explain what has changed, not describe exploit techniques.

Security fixes should be developed and have their testing done on **private forks** of the appropriate Rocket.Chat versions that will receive the fix. That means these PRs should not show up in the public repositories.

CVE IDs

We use CVE IDs to uniquely identify and publicly define vulnerabilities in our products. Since we publicly disclose all security vulnerabilities 30 days after a patch is released, CVE IDs must be obtained for each vulnerability to be fixed. The earlier obtained the better, and it should be requested either during or immediately after a fix is prepared.

The security team currently requests CVEs either through the HackerOne form (preferred) or directly through MITRE's webform.

Keep in mind that some of our security releases contain *security related* enhancements which may not have an associated CWE or vulnerability. These particular issues are not required to obtain a CVE since there's no associated vulnerability. CVE IDs obtained via the webform must be manually referenced in the HackerOne issue.

When a Fix is Ready

When a patch has been developed, tested, approved, and a new release is being prepared, the dev team updates the clickup task with a reference to the PR(s).

Security then informs the researcher via HackerOne. Post a comment on the HackerOne issue to all parties informing them that a patch is ready and will be included with the next release. Provide release dates, if available, but try not to promise a release on a specific date if you are unsure. You may also share relevant code snippets with the researcher for him to comment on or verify the fix.

This is also a good time to ask if the researcher would like public credit in our release blog post and on our vulnerability acknowledgements page for the finding. We will link their name or alias to their HackerOne profile, Twitter handle, Facebook profile, company website, or URL of their choosing. Also ask if they would like the HackerOne report to be made public after the responsible disclosure period counting from the release. It is always preferable to publicly disclose reports unless the researcher has an objection.

For **critical** security issues, prepare a message for Rocket.Cat to be sent out on release day.

On Release Day

On the day of the security release several things happen in order:

- All security patches are pushed to the public repository (unless they are not already in there).
- The new Rocket.Chat version is published.
- For **critical** security fixes, an additional Rocket.Cat message is sent to all registered workspaces.
- The update process of the hosted workspaces is started by the infrastructure team
- The public is notified via the Rocket.Chat blog release post.
- The security updates page and the White Hat Hall of Fame are updated with appropriate credits to the reporting researchers.

Once all of these things have happened notify the HackerOne researcher that the vulnerability and patch are now public. The Clickup issue should be closed and the HackerOne report should be closed as "Resolved". Public disclosure should occur if the Hacker has requested it and the responsible disclosure period is started. Any sensitive information contained in the HackerOne report should be sanitized before disclosure.

After release day

Swag for Reports

We award swag on a case by case basis. Details are in our responsible disclosure policy on HackerOne. When a report is closed, ask the reporter if they would like a swag code for free Rocket.Chat clothing or accessories. Swag codes are available by request from the operations team.

Responsible disclosure period ended

After the responsible disclosure period has ended, HackerOne will automatically release the report. Upon notification of the report release, update the CVE entry via the webform if it had been requested via the webform. Otherwise HackerOne will automatically update the CVE entry.

Pentest

Internal pentest

For pentesting, we use OWASP ZAP. OWASP ZAP is a Proxy server that allows for testing against common web application vulnerabilities. The relevant GDrive folder is here.

We use the following process:

- Install the most recent version of OWASP ZAP on a local machine. Get it from the website.
- Set up a test instance of Rocket.Chat with all features enabled with the most recent version
- Use persistent session in OWASP ZAP
- Analyze --> Scan Policy: Import the "basic scan" and "selected Features" policies from GDrive
- Perform an automated scan using traditional and ajax spider
- Remove non-rocket.chat domains (e.g. gstatic) from the scope
- Perform an automated scan using both scan policies
- Now perform a manual scan: log in using both a standard user and an admin account created in the test instance and explore. Focus exploration on newly added or recently changed features.
- Perform another automated scan using both scan policies
- End the scan activities
- Create a PDF export and an HTML exports of the alerts. The PDF export is easier to read and open, but does not contain all fields. This is a problem with ZAP.
- Export the current session of OWASP. Watch out, the file size can be several GB.
- Store both reports in GDrive with an indicator of the date the scans were performed.
- Go into Clickup and check all findings (except informative ones) against existing or past Clickup tasks. Search for the tag "pentest".
- Add new tasks for new findings. Re-open closed tasks for findings that keep re-occuring even though they were closed in Clickup already. Do not open a new task for closed tasks that have a comment regarding acceptance of the vulnerability.
- Provide an overview of the recent scan in the #security channel in RC.

External pentest

External pentesting is performed by an independent company. Each pentest is based on a specific engagement description, which outlines the test procedures and scope of the testing. External pentesting must produce a report with identified vulnerabilities in a shareable format to customers and other stakeholders. All vulnerabilities identified in the pentest must be mitigated before the report is shared with external stakeholders.

Tasks & Project Management

Task and Project Management for Security occur in Clickup . Security uses three projects:

- Product Security: contains tasks that deal with the overall features and improvements of our products and services, e.g.: new features
- Security Management System: contains tasks that deal with our internal management processes of security, e.g.: policies, reoccurring audit tasks
- Incidents & Vulnerabilities: containts tasks that deal with the said, e.g.: hackerone reports, github issues pointing out a flaw

A task should have complete information available to answer all "W"-questions.

Tags are the most important instrument to classify tasks. A task can have multiple tags.

Security tasks that are worked on currently must be added to the current sprint. Sprint tasks should be estimated with Sprint points.

Tasks involving security are often added into other lists in other projects in Clickup. Other teams requesting resources of the security team should simply create a task in Clickup and assign it to one of the security members.

Tasks can be shared publicly via the sharing function, but only the content that is deemed adequate for the public.

Code Analysis

Static Code Analysis

Static Code Analysis helps us find potential security vulnerabilities in the codebase. We use "LGTM" on our public GitHub repositories. For every pull request or ad-hoc as queried on other parts of the code, LGTM analyses the code and provides alerts with recommendations to fix. We use LGTM the following way:

- LGTM is enabled for all public repos
- To enable LGTM for a repo, you must be admin
- To access LGTM, use your GitHub account
- LGTM provides alerts when merging new PRs. The merge process is delayed by a couple of minutes, depending on the size of the code changed. Alerts should be reviewed before the PR is finally merged.
- To review an alert: Open it in LGTM, review the alert and recommendation, and decide on the mitigation measure. There are different types of alerts (error, warning and recommendation). Errors and warnings must be mitigated, recommendations are optional.
- To mitigate an alert: change the codebase as per the suggestion and re-submit the PR. Review that the alert does not show up anymore.
- To dismiss an alert, click the crossed-out eye icon and follow the instructions. As the dismissal involves adding a line in the code, we should limit dismissals of alerts and rather re-tune LGTM or fix the alert at its root.

Repo owners and the security team should use the query console to analyze other parts of their repositories on a regular basis, that are not affected by PRs. On a monthly basis, the security team will create a report with all open alerts and request a response to open alerts not tagged with a mitigation measure. Repo owners must submit a response to an alert in LGTM until the next monthly report.

WhiteHat Hall-of-Fame

Rocket.Chat is very grateful for the following people who have responsibly disclosed vulnerabilities to us:

2023

Priyank Parmar

Stefan Grönke (gronke)

Wojciech Kępka (vv9k)

Maik Stegemann (sectex)

Rojan Rijal (rijalrojan)

2022

Stefan Grönke (gronke)

Doge4doge (d4d)

Ghaem arasteh (ghaem51)

Emil (mikolajczak)

Ayoub (ayoub0x1)

Maik (Sectex)

Mohammad Saqib Arif (saqib98)

Ildefonso González Sánchez (f0ns1)

Mikhail (yuske)

2021

Sonali (sonalirajput)

Rolf (rolfzur)

Daniel J (danieljpp)

Olegeekk (olegeekk)

Dark Army (darkman26)

WhiteWinterWolf

Hosein vita (hosein_vita)

Maik (sectex)

Cuong Huu Nguyen (chnguyen98)

Aman Kumar (nighthawkk)

Mzha (mzha)

Ganesh Bagaria (ganofins)

Hhjjyy (hhjjyy)

Dustin (dustinboi)

LXR (lisbonresearch)

SonarSource (sonarsource)

Ayoub (ayoub0x1)

Ivar Darkwood (dago_669)

Paulo (paulocsanz)

Blackhat201319 (blackhat201319)

Stefan Grönke (gronke)

Ali Fathi Ali Sawehli (alifathi)

Abhinav Porwal (cyberasset)

Andrew (khekhe)

hikim1 (hikim)

Rojan Rijal (rijalrojan)

Will Reiske (wreiske)

2020

Jorge Cardona

Shubham Panchal

Kunal Narsale

Nikhil Mittal

Ivars Vids

Vladica Savic

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Virendra Yadav

ALK Surya Teja

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Prathamesh Pawar (prawar)

Stefan Grönke (gronke)

Fabian Freyer (fabianfreyer)

Wfinn (wfinn)

(psych0tr1a)

Arun Magesh (arunmagesh)

Dustin (dustinboi)

Maor Dayan (officialm)

Maik (sectex)

Benjamin Altpeter (baltpeter)

Garret (garretby)

Albarafii (xasa_sad234)

Tillmann (tillmann)

LordMX (gremlinxca)

sadegh (sadeghrz)

Elfi man (elfiman)

Ivars Vids (ivarsvids)

Tomp1 (tomp1)

Steven Julian (steven_julian22)

Amy Burnett (itszn)

Tim Zieger (mrthacking)

2019

Johann Helbling

Maik Stegemann

Dipmalya Pyne

2017

Steeve Barbeau

2016

Shubham Shah

Joe DeMesy

Matthew Bryant

Yury Maryshev, Mikhail Klyuchnikov, Alexandr Shvetsov

Sachin Wagh(@tiger_tigerboy)

Ketankumar B. Godhani

Sam Whited

Michal Marek

Matthias Brun

Jeandre Le Roux

Dennis Brakhane

2015

Sabri Haddouche

Kamran Saifullah

Matt Austin

Matt Austin

The Rocket.chat thanks all these amazing researchers. Thank you very much.

🆘 Support

Welcome to the Rocket.Chat Support Handbook. We remove obstacles and solve problems to ensure our customers can focus on what they do best!

Responsibilities

Customer Support Team responsibilities include answering inquiries, providing product information, troubleshooting, handling issues, and continuously improving the customer experience.

Product Information

Customer Support Analysts should be knowledgeable about the company's product and be able to provide information to customers.

They should also extend assistance to customers with respect to any billing inquiries they may have.

Troubleshooting

Customer Support Analysts should be able to help customers resolve issues they may encounter with our product.

Customer Experience Continuous Improvement

Customer Support Analysts should strive to improve the overall customer experience by gathering feedback and providing suggestions for product improvements.

Tiered Structure

Our Customer Support team uses a tiered support structure that splits technical support tasks into different levels. Each level has its own responsibilities and expertise.

Role	Job Responsibilities
Support Analyst | **Level 1**	**Our First-Line of support gets all the customer tickets and sorts them based on its complexity.** They handle **everyday customer concerns that are common and urgent**. Their priority is to solve problems ASAP so that customers can carry on with their day. They also try to **collect as much information about the customer's issue as they can**. If they're unable to fix the problem, they'll hand it off to second-line support.
Support Specialist | **Level 2**	**Second-line support is responsible for addressing customer problems that are too technical, uncommon, or time-consuming for first-line support.** Second-line agents possess specialized knowledge, focusing on complex issues that require an in-depth understanding of our product. If a recognized product issue is identified, **second-line agents are responsible for escalating the issue to the R&D team** (3rd Line).
Support Manager	**Technical Support Manager oversees the team** and is responsible for managing the technical support process, which includes **managing the queue of support tickets and escalated issues.** The manager also makes sure that **support is provided quickly and effectively.** Additionally, they assist other customer-facing departments with any technical questions they may have.

Supported Environment and Versions

Enterprise Support
Rocket.Chat Docs

Supported Environment and Rocket.Chat Versions

Support Plans, Availability, and SLA

Rocket.Chat offers a variety of support packages for all customers.

The details of our Support Plans and Service Level Agreements (SLAs) can be found in our product documentation:

Enterprise Support Plans
Rocket.Chat Docs

Support Resources

Rocket.chat has a variety of self-services tools and channels.

Rocket.Chat Documentation
Rocket.Chat Docs

Rocket.Chat Docs

Rocket.Chat Developer
Rocket.Chat Developer

Rocket.Chat Developer

Status • Rocket.Chat

Rocket.Chat Status Page

Rocket.Chat
Rocket.Chat

Rocket.Chat Forums

Customers Channels:

https://desk.rocket.chat/

Rocket.Chat Support Ticket Portal (customers only)

- Rocket.Chat Email (check supported plans): support@rocket.chat
- Rocket.Chat Hotline (check supported plans): +1 (833) 479-0110

Note: When reporting an issue, please check out our tips and advice here.

Support Processes

Support Ticket Life Cycle

After getting in touch with Rocket.Chat through email, phone, or ticket portal as a customer, what are the next steps?

Once you create a support case, it will be automatically directed to an available Support Analyst who can handle your issue, based on the summary and description you provided. The assigned Analyst - Level 1 will get in touch with you to comprehend the impact the problem is having on your business and gather any necessary details to effectively troubleshoot the issue.

The Support Analyst - Level 1 will follow up with you in different ways based on the severity of the problem you're facing:

- If the issue/question can be resolved/answered quickly, the Analyst will update the case and guide you through the explanation or steps to implement the solution.
- If the issue cannot be resolved swiftly or reproduced for further troubleshooting, the Analyst may request your cooperation to gather additional information until they can replicate or resolve the issue.
- In case the Analyst cannot reproduce the issue or identify it as a product defect, the Analyst will escalate it to the Level 2 team for a thorough analysis. The Level 2 team will then take charge of addressing your case to our R&D team for resolution. The items that have a significant impact on the customer base are given top priority.

Support Ticket Status

Customers who have access to our Ticket Portal can check the status of their tickets.

Status	Description
Open	Your ticket has been received, and a Support Analyst has been assigned to analyze your case. An "Open" status also indicates that a customer has responded to the ticket at any point during the case.
At Investigation	Your ticket has been received and is being actively analyzed. At this point, the Support Analyst may ask you for more detailed information or may be discussing your case internally.
Waiting for Customer	The Support Analyst has either responded to your question/requirement or is waiting for more information as previously requested. **Tickets labeled as "Waiting for Customer" will be automatically closed after 7 days if no response is received.**
Escalated	Your ticket is identified as a product defect (issue) and it's been escalated to our R&D team. The R&D team is analyzing the case and will place it in the resolution queue based on its severity and impact.
Closed	Your issue has been resolved or we provided a solution based on the Support Analyst's diagnosis. Closed tickets may also indicate that your ticket was closed after 7 days due to it being labeled as "Waiting for Customer" status.

Issue Escalation Process

Your case is a product defect and you already reported it. So, what are the steps until be resolved?

Step 1 | Level 1 Analysis

The Level 1 Support Analysts are responsible for collecting all the information and evidences related to your case. They will also attempt to reproduce the reported issue in their own environment. If they are unable to provide a solution or the issue is confirmed, they will escalate your case to a Level 2 specialist.

Step 2 | Level 2 Issue Confirmation

The Level 2 Support Specialist will re-analyze your case and gather all the necessary details to discuss it with the Product Team. In some cases, the Level 2 Specialist may require additional information from the customer.

Step 3 | Level 3 Assessment

The R&D team has confirmed that your case is a product defect and will create a JIRA (Internal Project Management Tool) task that is related to the issue. The issue will then be placed in the development queue to resolved soon.

Escalation Status

As your issue is being specified, treated, reviewed, and released by our R&D team, you will receive automated messages according to each JIRA issue status:

Status	Description
Specifying	It means the R&D team now is checking and validating its context and information, and if there is any question regarding the case to move for development. No ETA yet. At this point, the customer receives a message from our ticketing system.
Ready	It means the R&D team gathered all the necessary details and now the issue is ready to be tackled by the team. No ETA yet. At this point, the customer receives a message from our ticketing system.
In Progress	It means the R&D team is actively working on the issue and it will be delivered in one of the next releases. At this point, the customer receives a message from our ticketing system.
Done	It means the task is being solved completely and we have a new version or patch released. At this point, the Support Specialist responsible for your case will receive a message to contact you with all the details and directions.

Support Team Tech Stack

Daily work systems/tools

- Zoho Desk -> Ticketing System
- Freshcaller -> Hotline Support System
- Zoho CRM -> Customer Relationship Management System
- JIRA -> Project/task Management Tool
- Omnichannel KeyGen -> Omnichannel/Facebook token generator
- Rocket.Chat GitHub Repositories
- Fleetcommand / Cloud Admin

Testing environments

- Rocket.Chat CentOS - AWS - http://support-test.dev.rocket.chat:3000/
- Windows Server - Public DNS: ec2-3-12-234-90.us-east-2.compute.amazonaws.com
- WordPress URL: http://3.15.32.173/

Ticketing Tools

Zoho Desk

Rocket.Chat main support platform is Zoho Desk. Tickets can be created by a support agent directly inside Zoho Desk (in case of internal request) or by a customer or community user from external ways: Zoho Desk Support Portal, Rocket.Chat main website form, e-mail, social media (Twitter, Facebook) or offline livechat message.

Alternatively, emails sent to one of the email addresses below will reach Zoho Desk as well:

- `cloud@rocket.chat`
- `omni@rocket.chat`
- `support@rocket.chat`
- `suporte@rocket.chat`
- `security@rocket.chat`
- `gdpr@rocket.chat`

Working with Zoho Desk

An agent can see whether the ticket was created from a web request or email by checking the **History** tab of the ticket, and from the icon preceding the ticket title. If the ticket was created through a web request, the Channel field in the History tab will show **Web**. If the ticket was created through email, the Channel will say **Email**. Facebook and Twitter messages will be displayed accordingly.

Ticket Priorities

There are three priority levels:

1. `High` (e.g., system down, main functions affected, large number of users unable to access, severe performance problems)
2. `Medium` (e.g., essential functions affected, significant impact to system usage, inconsistent performance)
3. `Low` (e.g., small impact to functions, low number of users affected, minor bugs, simple questions)

Tickets created by email are automatically assigned as "Medium" priority and will have the associated SLAs according to the account information.

The account information from all customer base are in synch with Zoho CRM, and we base our SLA calculation taking into account the information stored on Zoho CRM. Everything is automated and retrieved in the ticket creation.

Ticket Tags

We are starting to track and categorize the different types of issues the customers are reporting to Support. For that, we will use the ticket tagging feature in Zoho Desk and consume this information afterwards. Below you will find the tags list and some guidelines on how to use them.

Areas

The "area" tag is related to which piece of Rocket.Chat product/services the issue belongs to. The following tags are in synch with the tags used in ClickUp:

- Cloud Service
- Marketplace
- Omnichannel
- Authentication
- Apps / Integrations
- Data Import / Export
- Scalability
- Deployment
- Permissions / Settings
- Privacy

- Compliance
- Team Collaboration
- Administration
- Video Conferencing
- Mobile / React Native
- Frontend Backend API
- Electron
- UX/UI

Type

The "Type" tag is to describe the ticket type itself, the idea is to combine the *type* and the *area* tag for further details on the ticket nature

- Insufficient Documentation
- Bug
- Consulting
- Sales Related Question

Special Tags

The "special" tags are to be used on process/operational (such as Cloud service requests) related issues or to map known issues/question (such as licensing or self-hosted registration)

- deletion request (requests to delete Cloud account in general or a workspace in particular)
- cancel subscription
- database export
- billing (for all billing-related reports)
- refund (for refund cases in particular)
- cloud account (for all general inquiries/concerns related to the cloud accounts&functionality)
- connectivity services
- self-hosted registration
- licensing
- push notification
- bad user experience

Zoho Desk Departments

Currently Zoho Desk is divided in three different departments:

- **Paid Support ->** All tickets with contractual SLAs (paid customers)
- **Community ->** Tickets related to the community users (no deals/contracts or active trials)
- **Trials ->** Tickets related to the following customers/users
    - Active SaaS trial customers
    - Potential customers
    - Potential - VIP customers

Currently all agents are assigned to all departments. The ticket routing between the departments is done automatically via scripting.

Freshcaller | Hotline Support

24x7 phone hotline support is offered within Rocket.Chat paid support plans.

Phone calls are handled in Freshcaller tool. Each call results in a ticket that is created in Zoho Desk and sent to the customer as a short follow-up. If the issue addressed via hotline needs to be escalated to the developers or sales team, the support staff assigns the ticket accordingly and notifies the responsible team member in Open Server. All support agents should be connected to Freshcaller during their shift.

Mobile Apps Reviews

Mobile applications reviews are routed from the Google Play Developer console and App Store developer accounts to AppFollow. The responses to all reviews can be posted either through the developer accounts on each app store, or in the AppFollow workspace. Reviews for beta versions are answered by the in-house team, while other reviews are handled by the remote support team. Critical or frequent issues occuring in the reviews to mobile apps are addressed to the mobile team in Open Server.

Support Analyst Best Practices

Solving technical problems can be hard, but it always helps to keep a few best practices in mind:

1. Clearly define the problem. If the problem description provided by the user is unclear, try to clarify if first before jumping to conclusions. Try to write the problem in your own words and see if you clearly understand what are the issues involved.
2. Gather data! The more, the better. For example: how many users are affected? If only a few, which ones? What system areas are affected? Can the problem be reproduced consistently, or is it intermittent? When did the problem start? Was it working before? What changed recently? If the issue is client-specific, collect the info on the client as well (version of the browser or desktop app, mobile app, opeartional system etc)
3. If a problem is reproducible, try to do so on a test system. Sometimes a simple instance installed on a virtual machine is enough to troubleshoot most scenarios.
4. If you know what is the solution, test it first. Does it work correctly? Can it be improved? Are there any other workarounds?

Follow-up

When following up on a closed ticket, ask the following questions:

1. Can a related documentation be improved or created?
2. Is the problem related to a known or new bug?
3. Is the problem related to a missing feature? Can a feature request be created?

Zoho Desk Contingency Plan

In case our Ticketing tool is down. How we operate?

Once we detect any Zoho Desk outage (Zoho Status Page) that prevents us from providing minimal operational support services to our customers, here are the steps we will perform as a contingency plan:

Step 1:

All customers will be informed of the current case by the Support Manager and will be advised that the only temporary channel for logging tickets is via email at **support@rocket.chat**.

Step 2:

For each new case received in the email box, the Support Manager forwards it to the agent in the shift. After this, the agent continues the case on his own email.

For each open case (emails thread with no resolution confirmation or pending reply), the Support Manager forwards it to the current case owner and the agent will continue the case on his own email.

Step 3:

After Zoho Desk establishment, all the cases must be registered in the platform if needed. All customers will be informed.

GitHub Issues

How GitHub issues should be managed

We have two GitHub actions using helping handling issues without a response for long periods of time. They are both using Close Stale Issues using the following configurations:

Stale issues

Configuration options here

- Bot will search for issues without new comments in the last 60 days that doesn't have any of the following labels:
  - `Epic`
  - `Feature: Planned`
  - `sla`
  - `sponsored`
  - `stat: waiting PR merge`
  - `Triaged`
  - `subj: security`
- For issues matching the criteria the bot will add the label `stat: stale` and will add a comment to explain that the issue is now marked as stale.
  - If the issue receives a new comment or any other update after being marked as stale, it will automatically be removed from stale and have it's label removed.
- Issues with the label `stat: stale` that didn't receive new comments or updates after 7 days will be automatically closed.
- New comments after the issue is closed will not open the issue again (not supported by the bot). What we could do in this (and is supported by the bot) is to add a new comment saying what the issue owner can do, it could be something like "please test with most recent release and open a new issue if still happening".

No response issues

Configuration options here

- Bot will search for issues with label `stat: need more info` without new comments or updates in the last 10 days
- For issues matching the criteria the bot will add the label `stat: no response` and will add a comment to explain that the issue is now marked as stale.
  - If the issue receives a new comment or any other update after being marked as stale, it will automatically be removed from stale and have it's label removed.
- Issues with the label `stat: no response` that didn't receive new comments or updates after 4 days will be automatically closed.

Since someone have interacted with the issue before the bot actually close the issue, if the owner replies after it is closed, it's responsibility to the user that add the label `stat: need more info` to evaluate the reply and open issue again.

Support Ticket FAQ

Importing your workspace from on-prem to Rocket.Chat Cloud

This document describes the procedure to perform the cloud import and a few considerations before proceeding with it.

This process is intended to help users get their on-premise instance migrated to the Cloud if they decide to use our Cloud services.

In order to start the migration, there are a couple of things to consider.
1. The origin environment needs to be on a stable version.
2. There are a couple of tools and dependencies needed, so the origin server needs to have an up-to-date OS.
3. On the origin environment we need to download the Cloud Import Tool. https://s3.amazonaws.com/cloud.rocket.chat/tools/cloudImport/linux-amd64/cloudImport
4. The cloud import tool uses mongo db tools to perform a db dump. So make sure you have them installed. https://docs.mongodb.com/database-tools/installation/installation/5. You need to have a could workspace already set up and a cloud account in order to run the cloud import tool. Check the guide on how to create a Cloud account https://docs.rocket.chat/rocket.chat-saas/cloud-account.6. **IMPORTANT:** The destination server **must NOT be in use**, only set up and we need to flag it for import, you can create a trial Workspace and we will take care of flagging it after you let us know.

Using the cloud import tool

Once the cloud import tool has been downloaded you can use it to start the import.
You can use the cloud import with the below command:

./cloudImport-
connectionstring="mongodb://127.0.0.1:27017/rocketchat" --
database=rocketchat

Use MONGO_URL that you normally pass to Rocket.Chat as the connection string. This tool does have a pop-up window to a browser. So if you are running on a server environment where you can't do that you'll need to first get a token to use. You can do that with:

curl -L -X POST
'https://cloud.rocket.chat/api/v1/login' \
-H 'Content-Type: application/json' \
--data-raw '{ "email": "cloud-registered-email", "password": "password" }'

This in turn should return the token: {"token":"ey..."} That ey.. value is the token, is a hash, and needs to be copied so it can be passed as an argument on the cloud import command the option is
--token="{token}"

If you want to run with zero downtime, you can pass the flag

--final=false

on first import. It will import. Then you can transition your users over and validate. When ready to finish you can run the cloud import command one more time with

--final=true

and it will import without shutting down the remote server. Settings changed during this diff won't be taken. For troubleshooting purposes, you can use the flag

--debug=true

in order to have an output with feedback about how the process is going and which step is taking. Example of a cloud command

./cloudImport--connectionstring="mongodb://127.0.0.1:27017/rocketchat"
--database=rocketchat
--token="ey..."
--final=false
--debug=true

Setting things up on cloud

Setting things up on cloud

After the import tool is done, it should have uploaded everything to our Cloud. From this point, we will proceed to import everything and get the flagged destination set up. Once it is done you can access it and make sure everything is ok. After everything has been completed, we need to change the DNS entry to point the traffic to the cloud instance. This process may depend on what you have configured as your DNS provider. Finally, if this is not a final import, just repeat the process and everything should be good to go.

Snaps

There are a few considerations when importing from a snaps deployment.

1. The database is not called rocketchat, it is called "parties" instead, so please note this when trying the connection string and the database (it would look like
--connectionstring="mongodb://127.0.0.1:27017/parties"
--database=parties
2. When trying to install the mongo dump you may run into issues with it if you install it manually. You can get the mongodump that is included in the snap is by doing:
export PATH=$PATH:/snap/rocketchat-server/current/bin

Workspace name and address conflict in Cloud console

In a case where the DB for a prod server was cloned into the DB for the staging server, it could cause a conflict with the workspace name and address in the Cloud console. One issue could be that when the admin hit Sync in the staging env, it could cause the workspace name and address for the prod env to change (that is, look the same as the staging env) in the Cloud console.

The resolution: Unregister the staging server with the Cloud console by un-setting the Cloud_Workspace_Client_Id in the staging env DB. This can be done by connecting to the DB and running the command: `` `db.rocketchat_settings.remove({"_id": "Cloud_Workspace_Client_Id"})`, `` then restart the server and re-register it in the Cloud console. Finally, the license has to be re-provisioned on FC.

Images take forever to upload and render while using GridFS for MongoDB 4.X.X<

Description of the issue:
After upgrading to Rocket.chat version **4.X.X.**, MongoDB **4.2.X** and above some users reported slow image uploads and reduced performance in general.
The **main reason** is the usage of **GridFS for files uploading**, it's becoming very slow with 60K+ chunks and it takes forever to upload images and a long time for the images to be visible once the image is there.

> **Note:** GridFS is only sustainable if you are using the Retention Policy and only storing a small number of files per week which is not hefty but it is not recommended by us because it is not scalable.

Quick Solution:
1. Enter mongo shell (command example for Docker)

```
docker exec -it mongodb mongo
```

2. choose rocket chat DB:

```
use rocketchat
```

2. After adding an index with the command below, it **goes** back to normal.

db.rocketchat_uploads.chunks.createIndex({ files_id: 1, n: 1 }, { unique: true })

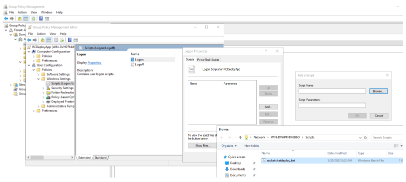
> **Reference:** https://github.com/RocketChat/Rocket.Chat/issues/23467#issuecomment-957126927

Deploying Rocket.Chat Desktop using GPO

Download the latest desktop app to a shared with everyone folder on your windows server, Create a script folder share it with everyone and write a script that will run each time a user logs in, ie.: rocketchatdeploy.bat:

```
if not exist %LOCALAPPDATA%\Programs\rocketchat\ (goto GO) else (goto STOP):GO
if not exist %APPDATA%\Rocket.Chat\ md %APPDATA%\Rocket.Chat\
copy /y \\ad01\Softwares\config.json %APPDATA%\Rocket.Chat\
msiexec /i \\ad01\Softwares\rocketchat-setup-3.4.0.msi /quiet
:STOP
```

config.json = you can customize the server URL on this file, so when you deploy to all machines, they will be pointing to the same and correct rocket.chat server.**ad01** = your server name, remember to share the folder with everyone.
Attach it to a GPO:



That's it, the summary would be:
if the folder %APPDATA%\Rocket.Chat\ doesn't exist, it will be created then the config.json file will be copied to the folder, and after that, Rocket.Chat app will be silently installed.

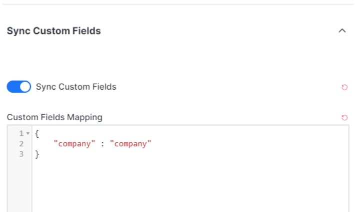
Syncing LDAP Custom Attributes

This guide will help you to sync custom attributes from your AD server (at the bottom you will find a hands-on video teaching on how to fully integrate LDAP with Rocket.chat):

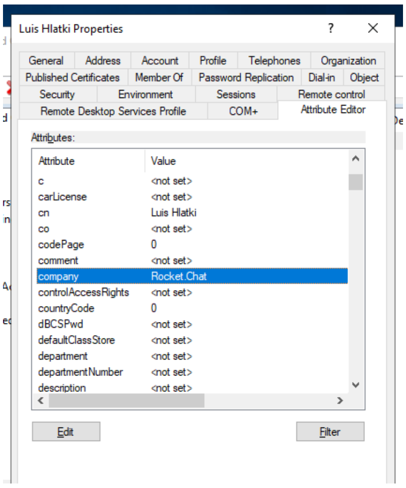
1) Go to Administration > Accounts > Registration and set the Custom Fields:

2) Go to Administration > Accounts > Custom Fields to Show in User Info and set the field that you want to be shown:

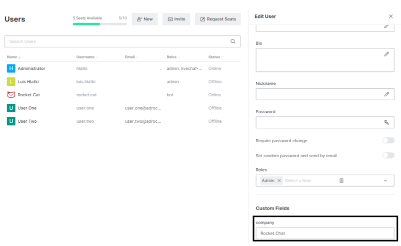
3) Under Administration > Accounts > LDAP > Enterprise > Sync Custom Fields enable and set the fields to be synced:



4) Now, on the Active Directory Side, set the Custom Attribute:



5) Under Administration > Accounts > LDAP hit the Sync Now button and proceed to Administration > Users and select the user, you should be able the custom field:



There's a video showing how to fully integrate LDAP: https://www.youtube.com/watch?v=18C_1bnQaMY

Error: Workspace is missing

Workspace is missing

Sometimes, customers could try to install an app from the RC server marketplace and encounter the below error message:

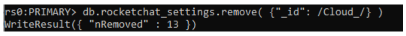
Sadly, an error occurred while processing your request.Request ID: 6c696a06-6869-42cc-a1f1-ba8681b8c1af

```
Error Code: 264
Error: workspace is missing
```

To fix this issue, we will need to re-initiate a connection from the RC server to our end. To do this, kindly do the following;

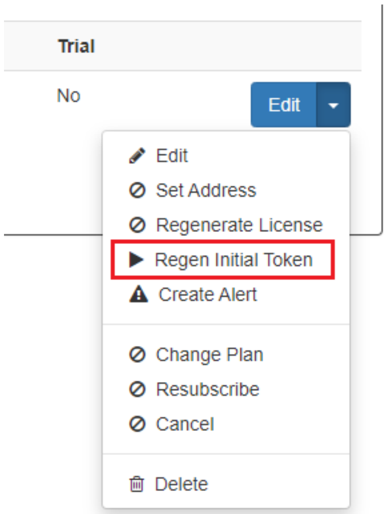
- Connect to their rocketchat DB and clear the Cloud info stored in the DB using the command:
- `db.rocketchat_settings.remove( {"_id": /Cloud_/} )`

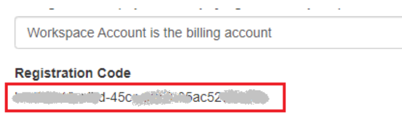
the result should be looking like this:

- 

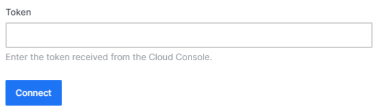
- **RESTART** the RC server

After we have their feedback that the above has been done successfully, search for the workspace in Fleet Command, click on the dropdown next to Edit and re-generate the registration token using the option "Regen Initial Token" (see screenshot below).



Then, go to the workspace details page in Fleet Command and copy the registration code. 

This code should be entered into the empty **TOKEN** field in the Connectivity Services page in the RC server, and then click on **Connect**.



Then try installing the apps from the Marketplace again. It should be installed fine now without any error.
P.S.: If the token field is not displayed on the Connectivity Services page, then either the DB query was not run correctly, or the RC server was not restarted. Both actions need to be done correctly.

File uploads very slow after migration to wiredTiger

This issue only occurs when the storage type is GridFS and can be resolved by re-creating the index.

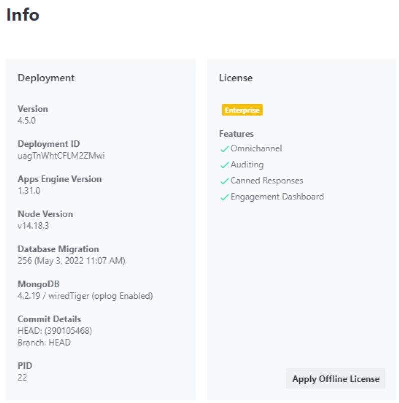
For docker installation, use the below commands to create the index:

1. docker exec -it mongodb mongo
2. use rocketchat
3. db.rocketchat_uploads.chunks.createIndex({ files_id: 1, n: 1 }, { unique: true })

LDAP feature was gone after upgrading my On-Prem deployment

First, be sure that your license is applied correctly to your Workspace. After release 4.X.X, LDAP became an exclusive feature for the "Enterprise" plan.

Go under **Administration > Info** and check for the orange "Enterprise" tag.

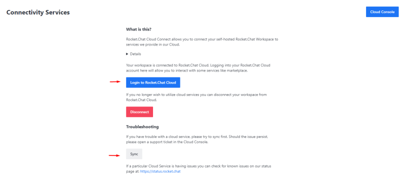


> **If you don't have the tag, look for one of these probable solutions below.**

1st Scenario

If you have internet access, try to log in to our Cloud and Sync.

1. Go under **Administration > Connectivity Services**.
2. Log into **Rocket.Chat Cloud** with the same account used to create your Workspace.
3. Hit **Sync** button



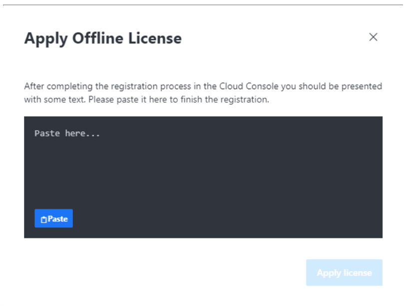
4. Check the Info page again.

2nd Scenario

You don't have internet access (Air-Gapped Operation).

1. If you lost the feature after an upgrade, you must contact our Support Team and ask for an updated License that reflects the version you are

using and apply it offline.

2. Go under **Administration > Info** and click on "**Apply Offline License**"
3. Copy and paste the license that you have been provided 

4. Check if the "**Enterprise**" tag is back.

Custom CSS - How to hide sidebar (Use case: when need to broadcast the room in embedded view)

Administration -> Layout -> Custom CSS

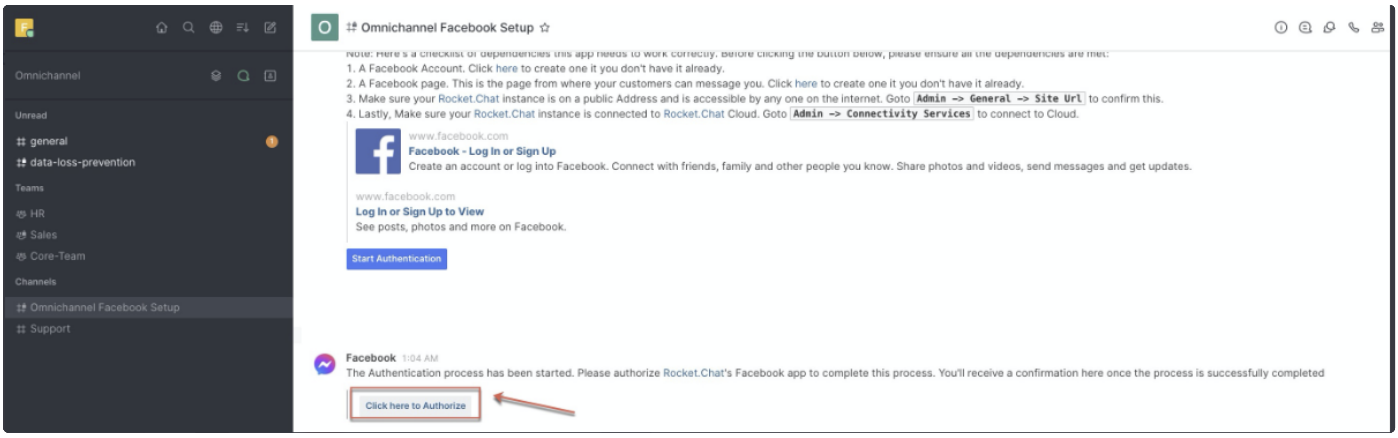
```
sidebar {
   display: none;
   }
```

How to set up multiple Facebook pages with a Facebook app integration

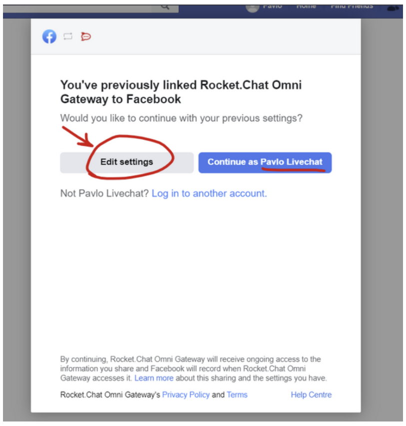
To have conversations routed to the same workspace from multiple pages through the Facebook app you need:

> **It is** mportant! that both pages should be connected to the **same business profile**

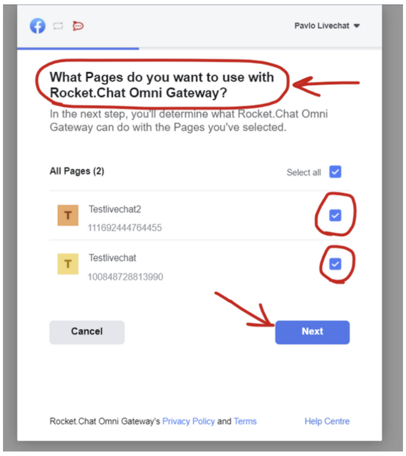
1. Authenticate:



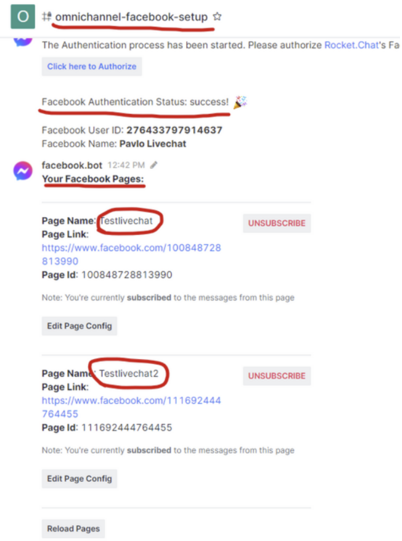
2. Edit settings:



3. Make sure to select all needed pages:



4. You can manage to route each page to a different department under the "**Edit page settings"** button:



FATAL ERROR: Scavenger: semi-space copy Allocation failed - JavaScript heap out of memory

When rocket chat service was crashed with the following error:

FATAL ERROR: Scavenger: semi-space copy Allocation failed - JavaScript heap out of memory

Most probably it is because the last time you tried updating/upgrading **Node** with a different package manager than used before like **npm/nvm/apt-get** etc. As a result, the location can be changed.

It is easy to check by the following commands:

which node - to check the location where the system thinks the current node is located

node -v to check the node version which is located in that location.

which -a node   - will show you all node locations

NOTE: Rocket.chat service is using by default the following location: /usr/local/bin/node

1. If the output shows you an old version it means you will need to upgrade or reinstall the node in the correct location with the method you have used during installation.

2. Or change a simlink: **ln -s /usr/bin/..... /usr/local/bin/node**

In the example on the first position should be the directory from the which node command output and on the second one **/usr/local/bin/node**

Multiple agents for one client

Issue Description

The customer wants to have multiple agents on live chat conversing with a single customer.

Action Taken

The agent who picks the live chat ticket should type **/invite @username** to invite another agent in.

Live Chat Widget Not Displayed

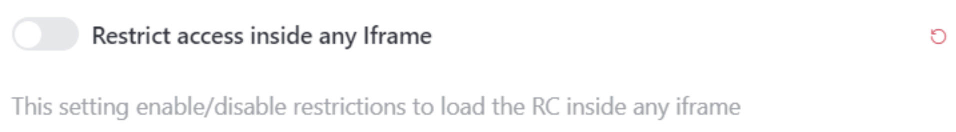
Issue Description

Live chat widget not displayed for customer's workspace/website.

Action Taken

Administration > General > Disable Restrict access inside any Iframe

Refresh **the** page, live chat widget should appear.



How to clear MongoDB to re-activate your workspace

This is the procedure on how to clear MongoDB data in cases where you have mismatching information and your workspace isn’t working as expected.

Reason/Causes:

You can’t access your workspace and needs to re-register after obtaining a new workspaceToken.

Environment

Self-hosted.

Steps on how to clear MongoDB to re-activate your workspace:

1. Enter the mongo shell with the command (this command depends on your deployment type and is different in the case of Docker):

> mongo shell

2. Chose rocket chat DB:

> use rocketchat

3. Run the following query (you should receive successful output where will be statements that a few entries were successfully changed):

> db.rocketchat_settings.remove({"_id": /Cloud_/})

4. Restart Rocket.Chat server (this is needed for the server to get the refreshed changes on the collection.

5. Request for the token from the support agent.

After all, you will need to pass the registration token which we provide for the workspace under Administration -> connectivity services.

Running the Cloud import tool on a Multipod deployment

Problem

In some cases where the client has a multipod-deployment, the tool may get stuck and although it won't show any errors, it won't progress on the import process.

Environment

RC on Docker deployments with more than one pod.

Cause

The main cause of the issue is that the tool fails to connect to the MongoDB, the tool does not diferenciate this, thus, the process will just never start since the connection to the MongoDB is never established.

Specific scenerios and solutions are given below:

Fix

Make sure you enter the container and download the import tool inside of the container and execute the tool from there.

In case the user would like to run the tool form outside the container, they will need toinstead use the IP of the database container in the connection string

Alternatively if the user wants to run the tool from a different container, they need to make sure to use the correct name of the DB container.

Useful commands:

docker ps (shows the current containers)

docker-compose exec mongo bash (mongo being the name of the service in the container)

docker inspect mongo | *grep "IPAddress"* (shows the external IP of the container)

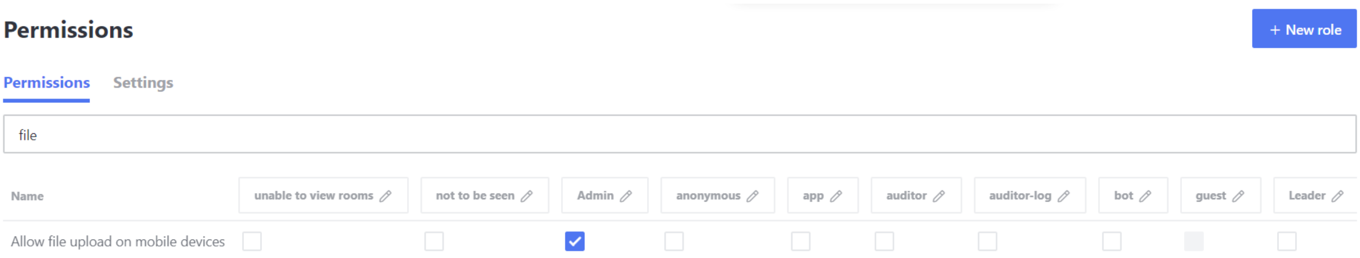
Send Image / Video button does not appear on mobile devices

Issue Description

The customer reports that for his workspace the users cannot see the buttons for uploading media (images/videos) in chats when using mobile devices. That affects both Android and iOS. When users press the "+" button the only thing that shows up is a 'create discussion' option.

Solution

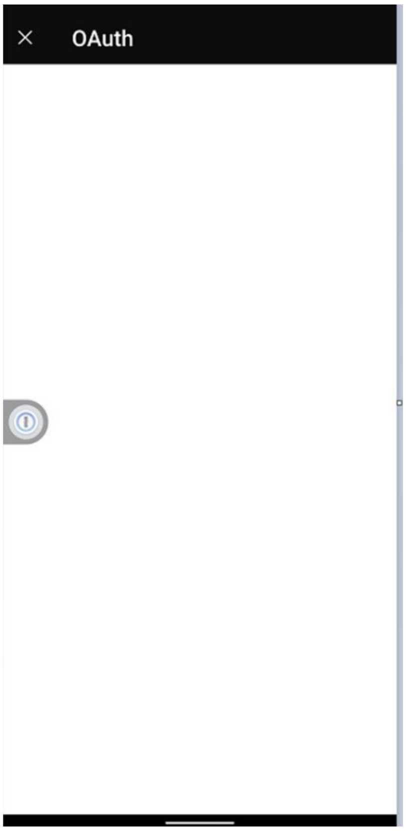
There is a specific permission that can prevent users from being able to upload files from mobile devices. Ask the customer to navigate to Administration > Permissions and check if their users have the role **Allow file upload on mobile devices** enabled.



Login with custom oAuth (keycloak) shows blank screen

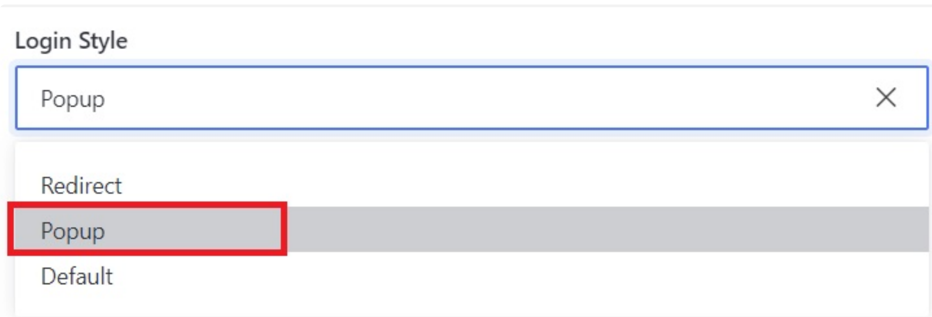
Issue Description

When trying to log in to self-hosted server using custom Oauth authentication customers get a blank screen after entering the Keycloak credentials on the keycloak login page. The app gets stuck there and it shows a blank screen even though it works well on the web.



Solution

Administration > Settings > oAuth > Custom oAuth > change login style from default to popup.



How to set up Nginx HTTP to HTTPS redirection (Default settings)

In case You decide to use this example, place the two config files separately inside /etc/nginx/sites-available and create a symlink for them inside /etc/nginx/sites-enabled (please temporarily remove symlink for your previous configs inside /etc/nginx/sites-enabled . No need to remove them completely)

1. First file name **"Default"**

```
  server {
     listen       80 default_server;
     listen       [::]:80 default_server;
     server_name Your_server_address.com
return 301 https://$host$request_uri;
location /{
proxy_pass http://localhost:3000;
proxy_http_version 1.1;
proxy_set_header Upgrade $http_upgrade;
proxy_set_header Connection "upgrade";
proxy_set_header Host $http_host;
proxy_cache_bypass $http_upgrade;
}
  }
```

2. Second file name "**https.conf"**

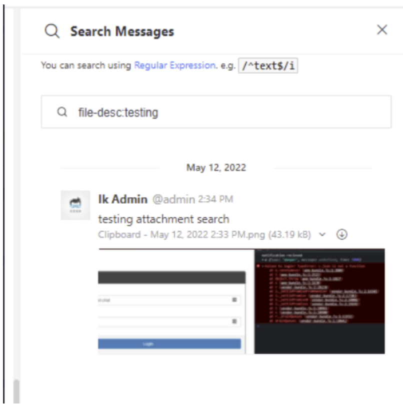
```
# HTTPS Server
```

```
server {
    listen 443 ssl;
    server_name Your_server_address.com;
    # You can increase the limit if your need to.
    client_max_body_size 200M;
    error_log /var/log/nginx/rocketchat.access.log;
    ssl_certificate your full cheined certificate location
    ssl_certificate_key your SSL certificate key location
    ssl_protocols TLSv1 TLSv1.1 TLSv1.2; # dont use SSLv3 ref: POODLE
    location / {
        proxy_pass http://localhost:3000;
        proxy_http_version 1.1;
        proxy_set_header Upgrade $http_upgrade;
        proxy_set_header Connection "upgrade";
        proxy_set_header Host $http_host;
proxy_cache_bypass $http_upgrade;
    }
}
```

How to search for attachments with the file description

The search for attachments with a file description is a bit different from the individual messages search and you actually can search them with a specific prefix.
To do this, you need to search with the prefix: file-desc: followed by your-file-title

Example: **file-desc:testing**



There is an exception to this type of search, you must not include space and you should type only one word which is part of the description, or a few characters(or syllable) which is part of any word inside the file description (see the above screenshot for better clarity).

At the time of writing this article, the only supported language for this is **English**. However, the Product team is aware of this limitation and working on a fix.