

Works

JIRA Epic

Project Lead

Product Manager

Engineering Manager

How to Use this Template

This template is a starting point for planning documents for technical projects. All headers are styled with a light yellow background color; you can remove this color when you've finished working on a section. This will make it easy to tell at a glance which pieces are in progress and which are done. You can also delete unnecessary sections, but think it through first! We've often under-planned and rarely over-planned in the past, so err on the side of planning. It's a lot easier to think your project through when you aren't under pressure yet. And don't just sketch out the milestones and tickets; you will thank yourself later if you put the time in up front to think the work through.

Now that you've read that, you can delete this section.

Project Summary

Describe the problem this project is solving or the functionality it's going to add. You can use the JIRA epic description as a starting point. The purpose of this section is to make sure that someone unfamiliar with the project, such as a future maintainer, an engineering director needing more details, or a project manager researching past projects, should be able to understand what's being built.

Glossary

If you're introducing any technical or product terms that aren't already commonly understood by engineers and product managers at Trusted, define them here. Feel free to delete this section otherwise.

Existing Implementation

If you're going to be modifying or replacing an existing implementation, describe it here. Explain why it does not meet the needs described in the project summary. If possible, link to the original project's documentation, code, JIRA epic, or whatever else will help the user understand it.

Proposed Solution

Overview

Describe your intended solution to the problem described in the summary. Things to consider here:

Dependencies

Trade-offs and risks

How this will affect existing functionality

Depending on the size of the project, this section could take three to ten or more paragraphs.

API

If this is a back-end project and you're creating new API endpoints, document them here.

Data Model

If you're changing existing data models or adding new ones, describe them here.

Metrics

How will we track whether or not we met our product goals for this project?

Monitoring and Alerting

What engineering metrics will tell us whether or not the new code is operating in a healthy state, and how will we be able to access that data?

What states should trigger alerts, who should be alerted, and how will we implement that alerting?

Deployment

For some projects, this can be as simple as shipping a PR. For many, we'll need to coordinate multiple steps. It's a very good idea to spend some extra time to plan it out clearly. It can be very frustrating to work hard on a project for weeks, only to fall flat during deployment and disappoint the stakeholders you were expecting to impress. Consider the following items:

Who are the stakeholders and how much coordination with them will be required?

Not all of these will apply to all projects, but think all of them through before crossing them off your list:

Updating existing data

Refer to this Guru card for good practices on data migrations

Changing the schema

Frontend/backend compatibility

Notifying the TSMs about imminent deploy

Rollout strategy (none vs. global feature gate vs. per-user feature gate)

Shipping code

Smoke testing in production

Post-release monitoring

Post-release cleanups (rollout flags)

Return to normal

Announcing the release internally

Rollback: you should always document this here, in advance, even if it's just "revert the PR merge and redeploy master"

Implementation Plan

Now that you've described what you intend to do, what are the specific milestones and supporting tasks necessary to do it? The goal is that once this document is finalized, you and your EM will

transfer these milestones and tasks directly into JIRA.

Milestone: Name

Task 1 name

Description of work

Estimate of time or complexity

Task 2 name

Description of work

Estimate of time or complexity