# 💬 RFC: DM role and responsibilities in new Platform structure

# Key Focus Areas

* **Delivery excellence**
  + implement optimized and transparent platform teams delivery processes with delivery metrics. Processes should be implemented in collaboration with Team Leads. In the following key areas, but not limited only to them:
    - SDLC: Discovery and Delivery stages
    - Platform support/incident requests
    - Release and deployment processes
  + organize Jira and Confluence to enable transparent and optimized delivery process. Should be implemented in collaboration with Team Leads.
* **Production risk management** - through security and quality levels enforcement
* **Team autonomy balance** - support Team Leads in all team activities without undermining their authority

Examples from team leads custdev



1. Shape roles in the new teams structure via describing mission and RACI matrix of each role
2. Design and implement unified optimal SDLC processes

# Company goals and performance

* Assistance in setting bottom-up goals and align team efforts to goals set by the top management
* Setting and maintaining structured goal-setting framework
* Assistance in setting and maintaining performance review framework for engineering teams. Framework should be created in collaboration with Team Leads.
* Assistance in engineers development if requested by a team lead
* Participating in performance review as a respondent

Examples from team leads custdev



1. Map team priorities to company level directions and vice-versa
2. Design and implement performance management framework for platform engineers and team leads. It should be done in collaboration with team leads and BPHR

# Team delivery

## ****Discovery Stage****

* **Facilitate requirements gathering sessions** between Customer, Product Manager, Team lead, and Tech leads
* **Manage discovery timeline and milestones** to prevent scope creep and infinite analysis
* **Track and manage dependencies and technical constraints** surfaced by engineering teams
* **Coordinate cross-team alignment** when features impact multiple trading activities and zones
* **Document and validate** that requirements are implementation-ready
* **Risk identification** - control and flag unclear requirements, regulatory concerns, or technical debt blockers, low-latency system awareness

Examples from team leads custdev



1. Formalize Discovery stage processes
   1. Define Jira item for this stage
   2. Define how to manage platform roadmap
   3. Define key process stakeholders
   4. Define and describe key discovery stage metrics

## ****Delivery Stage****

* **Sprint/iteration planning** - control that work is properly sized and prioritized
* **Coordinate releases** across teams and platform configurations, including release scope, schedule and PRE collaboration
* **Monitor progress** - design and implement key delivery KPI. Monitor them with a team
* **Manage stakeholder communication** - sync Product Manager on delivery status, risks, delays
* **Facilitate ceremonies** - stand-ups, retrospectives, demos, etc (only when Team Lead needs support)
* **Cross-team coordination** - orchestrate when multiple teams must deliver synchronized features
* **Quality gates enforcement** - ensure testing standards met before production deployment
* **Post-release monitoring** - coordinate support/incident response via building effective processes
* **Continuous improvement** - drive team delivery and overall processes optimizations based on delivery metrics

Examples from team leads custdev



1. Formalize Delivery stage processes
   1. Define Jira setup for cross-platform teams: issue types used, workflows, labels, fields, teams, etc
   2. Define key process milestones and stakeholders
   3. Describe and improve release process, PRE collaboration on deployments
   4. Define and describe key delivery metrics
   5. Define and describe key sprint ceremonies, and cross-team ceremonies

# RACI matrix

* **R** = Responsible (does the work)
* **A** = Accountable (single decision maker)
* **C** = Consulted (provides input)
* **I** = Informed (kept in the loop)

## 1. Performance management

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity** | **Delivery Manager** | **Team lead** | **Senior Team Lead** |
| **Define performance review framework** | R | C | A |
| **Conduct individual performance reviews** | C | R/A | C |
| **Prepare annual performance reviews** | C | R/A | C |
| **Team members personal development** | C | R/A | C |

## 2. SDLC & Process Management

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Activity** | **Lead DM** | **Delivery Manager** | **Team lead** | **Product owner** | **Senior Team Lead** | **Tech lead** |
| **Approve major process changes** | C | R | C | I | A | C |
| **Define and maintain SDLC framework** (Discovery/Delivery stages) | A | R | C | C | C | C |
| **Establish Jira/Confluence structure** | C | R/A | C | C | I | I |
| **Implement team-specific processes** | I | C | R/A | I | I | C |
| **Define delivery metrics/KPIs** | C | R/A | C | I | I | C |
| **Monitor and report delivery metrics** | C | R/A | I | I | I | I |
| **Drive process improvement initiatives** | C | R/A | C | I | I | C |

## 2. Discovery Stage

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Activity** | **Delivery Manager** | **Team lead** | **Product owner** | **Senior Team Lead** | **Tech lead** | **Customer** |
| **Define discovery framework** (templates, exit criteria) | R/A | C | C | C | I | I |
| **Run simple feature discovery sessions** | I | R | A | - | C | C |
| **Run complex/cross-team discovery** | R | C | A | I | C | C |
| **Validate business value** | I | R | A | I | C | I |
| **Prepare implementation-ready requirements** for team lead features | I | R | A | I | C | I |
| **Prepare implementation-ready requirements** | C | C | R/A | I | I | C |
| **Validate requirements are implementation-ready** | C | R/A | C | - | C | I |
| **Manage discovery timeline/prevent scope creep** | R/A | C | C | I | I | I |
| **Identify technical risks/constraints** | C | C | I | C | R/A | I |

## 3. Delivery Stage - Planning & Execution

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Activity** | **Delivery Manager** | **Team lead** | **Product owner** | **Senior Team Lead** | **Tech lead** |
| **Sprint/iteration planning** | C | R/A | C | I | C |
| **Backlog prioritization (team-level)** | I | R/A | C | - | C |
| **Cross-team priority conflicts** | R/A | C | C | I | I |
| **Tasks sizing and estimation** | C | R/A | I | I | C |
| **Sprint execution** | I | R/A | I | - | C |
| **Daily standups** | I | R/A | I | - | C |
| **Backlog refinement** | C | R/A | C | - | - |
| **Remove blockers (team-level)** | C | R/A | I | - | C |
| **Remove blockers (cross-team/infrastructure/PRE)** | R/A | C | I | I | C |
| **Facilitate team retrospectives** | C | R/A | I | - | C |
| **Drive team process improvement** | C | R/A | I | - | I |
| **Facilitate sprint reviews** | C | R/A | C | - | C |
| **Facilitate feature retrospectives** | R/A | C | C | I | C |

## 4. Release & Deployment

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Activity** | **Delivery Manager** | **Team lead** | **Product owner** | **Senior Team Lead** | **Tech lead** | **PRE** |
| **Define release process framework** | R/A | C | I | I | C | C |
| **Plan cross-team release coordination** | R/A | C | C | I | C | C |
| **Approve and control release scope** | C | R/A | C | I | C | I |
| **Quality gates enforcement** | R/A | C | I | C | C | C |
| **Execute deployment** | I | C | I | - | C | R/A |
| **Production monitoring (immediate post-release)** | I | C | I | - | C | R/A |
| **Rollback decision** | C | C | I | A | C | R |
| **Release communication to stakeholders** | R/A | C | I | I | I | I |

## 5. Platform Support & Incidents

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Activity** | **Delivery Manager** | **Team lead** | **Product owner** | **Senior Team Lead** | **Tech lead** | **PRE** |
| **Define support process framework** | R/A | C | I | C | C | C |
| **Handle L0 incidents** | I | C | I | I | C | R/A |
| **Triage platform L1 support/incidents requests** | С | R | I | - | C | A |
| **Coordinate cross-team incident response** | R/A | C | I | I | C | C |
| **Post-incident review facilitation** | R/A | C | I | I | C | C |
| **Track incident action items** | R | C | I | A | I | C |

## 6. Quality & Risk Management

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Activity** | **Delivery Manager** | **Team lead** | **Tech lead** | **Product Owner** | **Senior Team Lead** |
| **Define quality standards** | R | C | C | I | A |
| **Code review standards** | C | C | R/A | - | I |
| **Technical debt prioritization** | C | C | R/A | I | I |