Orion Customer Portal User Guide

Wireframe: Figma LINK

Login

wireframes: Login Screens.pdf

Login flow shows customer benefits, **all features in the application will enable these key benefits** -

1. Predictable, Timely, and High-Quality Delivery
2. Faster Time-to-Market
3. Development of Features that Truly Meet End User Needs

Dashboard

wireframes: Dashboard (1).pdf

Dashboard has 3 sections –

1. Key Delivery Metrics
2. Effort Distribution
3. CSAT Action Items.

Key Delivery Metrics

Each delivery metric is presented with the following three key data points:

1. **Current Value**: The most recent value of the metric, showing its current status.
2. **Benchmark Comparison**: Indicates how the current value compares to a defined benchmark. This helps categorize the metric as **green**, **orange**, or **red** based on performance.
3. **Trend Analysis**: Highlights the recent trend in the metric, showing whether it is improving (e.g., moving from red to orange) or worsening (e.g., moving from orange to red).

1. Cycle Time

Cycle Time measures the duration between the start and end of an epic. It is calculated using the **median**, is **weighted** by effort spent, and is presented as a **rolling window** (last 10 epics).

- **Median**: Provides a clearer picture by reducing the impact of outliers.
- **Weighted**: Larger epics are given more weight by considering effort spent.
- **Rolling Window**: Tracks trends over the last 10 epics.

Benchmark: No benchmark defined for Cycle Time for now.

Key Insights:

- **Long-Term Trends**: A decreasing cycle time shows improved efficiency; increases suggest bottlenecks.
- **Bottleneck Detection**: Sudden jumps indicate bottlenecks or process issues.
- **Performance Stability**: A stable cycle time means predictable delivery; fluctuations suggest inconsistency.

2. On-Time Delivery

On-Time Delivery measures whether epics are completed on or before their due dates. It is **weighted** by effort spent and tracked using a **rolling window** (last 10 epics).

- **Weighted**: Larger epics influence the metric more, using story points.
- **Rolling Window**: Captures on-time performance trends over the last 10 epics.

Benchmark: Target: 80%, Min: 60%, Hard: 90%

Key Insights:

- **Long-Term Trends**: Increasing on-time delivery shows improved predictability; a decrease suggests missed deadlines.
- **Performance Stability**: Consistent performance means reliable execution; fluctuations point to variability in meeting deadlines.

3. Velocity

Velocity measures the number of story points delivered by the team each month, normalized by the total number of developer days, which includes contributions from all team members.

Benchmark: Target: Average of past 3 months, **Min: 80% of target, Hard: 120% of target**

Key Insights:

- **Trend Analysis**: Increasing velocity shows growing capacity; decreases may signal challenges.
- **Predictability**: Consistent velocity enables better sprint planning and forecasting.

4. Planning Maturity

Planning Maturity tracks the number of active short epics with assigned due dates, indicating how well the team plans based on capacity and velocity.

Benchmark: Target: 70%, Min: 50%, Hard: 90%

Key Insights:

- **Commitment to Dates**: Encourages setting and meeting deadlines, promoting accountability.
- **Predictability**: Clear due dates lead to more predictable timelines.
- **Dependency Management**: Early identification of dependencies enables proactive mitigation.
- **Stable Delivery**: High planning maturity ensures smoother, more consistent delivery.

5. Planning Adherence

Planning Adherence measures the percentage of work completed against the planned work from the previous month, assessing how well the team sticks to their original plan.

Benchmark: Target: 70%, Min: 50%, Hard: 90%

Key Insights:

- **Alignment with Plan**: High adherence indicates that the team is on track; low adherence points to shifts due to unplanned work.
- **Impact of Unplanned Work**: Urgent features or issues can divert the team from the plan, lowering adherence.
- **Improved Planning**: Tracking adherence helps teams adjust future planning by understanding the frequency of unplanned work.
- **Adaptability vs. Commitment**: Balancing flexibility for unplanned work with commitment to planned tasks ensures stable delivery.

Effort Distribution (Heat Map and Swimlane)

Effort Distribution is visualized through a **heat map** and **swimlane view**, showing the effort in person-days spent across different modules over the last 3–4 months.

- **Heat Map**: Highlights effort concentration across modules, making it easy to identify where the most or least work has been invested.
- **Swimlane View**: Breaks down effort month by month, allowing for comparisons of how work has shifted over time.

Key Insights:

- **Effort Allocation**: Clearly shows where the team's time and work have been concentrated, ensuring alignment with key objectives.
- **Module Focus**: Identifies high-effort and low-effort modules, helping highlight areas that may be overworked or neglected.
- **Shifts in Focus**: The swimlane view helps track changes in work distribution over time, revealing whether certain modules are seeing increased or decreased attention.

CSAT Score and Action Items

Definition:
The CSAT (Customer Satisfaction) score reflects the level of customer satisfaction based on feedback received from the last evaluation cycle. Additionally, a list of action items based on the feedback is provided, along with their current status.

Key Insights:

- **CSAT Score**: Offers a direct measure of how satisfied customers are with the team's performance.
- **Action Items**: A list of specific tasks derived from customer feedback, aimed at addressing areas of improvement.
- **Status Tracking**: The status of each action item (e.g., completed, in progress, pending) allows stakeholders to monitor progress and follow-up on commitments made to improve customer satisfaction.

Delivery

Wireframes: Delivery.pdf

Flagged Epics

Flagged Epics are identified during the delivery process when they encounter issues that could hinder successful or timely completion. These flags help teams quickly address potential bottlenecks or quality concerns.

Conditions for Flagging Epics:

1. **Excessive Bugs**: Epics with a high number of bugs are flagged, indicating potential quality issues.
2. **Delayed Cycle Time**: Epics taking significantly longer than the median cycle time are flagged, indicating workflow inefficiencies or resource constraints.
3. **On Hold for Too Long**: Epics that remain stagnant for an extended period are flagged due to inactivity or unresolved dependencies.
4. **Missed Deadlines**: Epics that miss planned due dates are flagged to prevent further delays.
5. **High Effort Variance**: Epics where the effort spent significantly deviates from the story points (SP) assigned are flagged, indicating potential estimation inaccuracies.

Degree of Impact

Each flagged epic is assessed based on the **Degree of Impact** the issue has on the project. Not all flagged epics carry the same weight; the impact can vary based on the severity of the issue:

- **Minor Impact**: For example, missing a deadline by a small margin or having a manageable number of bugs.
- **Major Impact**: Critical delays, significant bugs, or large variances in effort that may heavily disrupt timelines and product delivery.

This approach helps teams prioritize which flagged epics need urgent attention and which ones are less critical but still need resolution.