# Title: Technical Program Manager (TPM) Onboarding Guide

## **Introduction**

* *TPM's main role is to ensure that all stakeholders are kept honest on the status and schedules of the program at all times.*
* *They would have to understand the business goals and priorities and ensure that programs run as per schedule*
* *To ensure the smooth running of the programs they would have to communicate to multiple dependent teams to track the dependencies/blockers and appropriately raise risks and mitigation items as well*
* *The 90 day onboarding guide would serve as a one stop shop for the TPM to get kick started as soon as she/he joins the FreshSales team.*
* *This document would ensure that all items and contact folks are spelt out clearly so that the TPM can get work through this mostly independently along with a few guidelines from the manager and fellow TPM.*

## **Overall Onboarding Plan**

***KT ->*** *3 - 30 days*

**Shadow →** 31 - *60 days*

***Reverse Shadow →*** *61 - 90 days*

### **Knowledge Transition Plan**

**Org Onboarding** (HR - 2 days)

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**BU Onboarding** (Buddy TPM - 3 days)

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**Role Onboarding** (Buddy TPM - 5 days)

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**Squad Onboarding** (EM - 10 days)

### **Week 1**

***Day 1 and Day 2*** - Attend Freshworks New Hire Orientation

***Day 3***

* + Meet and Greet with your reporting manager
  + Get set with your Laptop and peripherals
  + Manager will introduce you to the Freshsales engineering team, fellow engineering managers, QA managers, chief architect and product head
  + Meet with your buddy and understand the Freshworks floor layout
  + Manager will walk through this onboarding document with you.
  + Get Access to [freshrelease](https://freshworks.freshrelease.com/FSALES/) for the FSales project using lighthouse  [https://freshwor ks.freshrelease.com/FSALES/](https://freshworks.freshrelease.com/FSALES/backlog)
  + Go through our workplace - <https://freshworks.workplace.com/>

***Day 4***

* + Get a video link about freshsales, go through the video and understand the working of Freshsales - <https://www.freshworks.com/freshsales-crm/webinars/>
  + Talk to Fresh Sales Pre-sales contact person (xxx) to get an overview/demo of the product
  + Send a meet and greet meeting invite to fellow engineering managers, QA manager, chief architect, engineering head and HRBP
  + Subscribe to the email groups by raising lighthouse tickets - [freshsales-Ems@freshworks.com](mailto:freshsales-eng@freshworks.com), [freshsales-eng@freshworks.com](mailto:freshsales-eng@freshworks.com) and [freshsales-qa@freshworks.com](mailto:freshsales-qa@freshworks.com)
  + Get added to the Slack channels rooms by requesting your manager to add you - Freshsales Engineering, Freshsales Team , FreshSales Engineering Leadership ,FreshSales - QA
  + Zoom installation and configuration for video calls - <https://confluence.freshworks.com/display/IT/Zoom+Tips+and+Tricks?preview=/206570992/206570993/Zoom%20User%20Guide.pdf>
  + Complete all your payroll related information -  <https://www.allsechro.com/Freshworkspayroll/Common/Home.aspx>
  + Understand lighthouse and go through the process and policies
  + Our products - <https://lighthouse.freshservice.com/support/home?!company>
  + Freshworks Culture Code - <https://lighthouse.freshservice.com/support/home?!culture>
  + Freshworks Policies - <https://lighthouse.freshservice.com/support/solutions/23561>
  + Freshworks People Dashboard - <https://tgif.freshworks.com/dashboard/me>
  + Complete your pending onboarding process - PF account creation, document submission etc…

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| Induction and laptop |
| Meet and greet with Preethi , Priyanka |
| Meet and greet with Sudharshan |
| Meet and greet with JP |
| OVerview of Fsales engineering structure |
| Ways of working overview |
| Get Access to freshrelease for the FSales project using lighthouse [https://freshwor ks.freshrelease.com/FSALES/](https://freshwor%20ks.freshrelease.com/FSALES/) |
| Subscribe to the email groups by raising lighthouse tickets - [freshsales-eng@freshworks.com](mailto:freshsales-eng@freshworks.com) and [freshsales-qa@freshworks.com](mailto:freshsales-qa@freshworks.com),  [freshsales-ems@freshworks.com](mailto:freshsales-ems@freshworks.com) |
| Get added to the slack groups |
| Set up weekly recurrence meeting with your manager and squad 's manager |
| Freshwave training -https://confluence.freshworks.com/display/FRESWAVE/Freshwave |
| Get invited to the squad ceremonies and start attending them |
| Meet and greet with the squad's PM- Janani Jayaraman |
| Get access to freshsales dev portal and get a Kt on L2 process |
| L4/iteration bugs/Bugs metrics |
| Sprint metrics |

***Day 5***

* + Setup recurrence weekly sync up with manager for 3 months
  + Get details about [freshwave model](https://confluence.freshworks.com/display/FRESWAVE/Freshwave) and go through that -[Freshwave](https://confluence.freshworks.com/pages/viewpage.action?pageId=496706)
  + Go through the Fresh Sales squad boards in FreshRelease to get an idea of sprint status
  + Get to know the FreshSales engineering team structure - [Freshsales Engineering Team](https://confluence.freshworks.com/pages/viewpage.action?pageId=223795392)
  + Get video URL about the squad how spotify used squad model -

### Week 2

* Send one paragraph about yourself as an introduction to your manager for the introduction mail.
* Have two or three separate sessions with manager in understanding the Freshworks history, business model, working culture, stakeholders, expectations, Freshsales working rhythm
* Have a session with the team's TPM on past , current and future initiatives/features and the dependent teams
* This week you meet you squad members, engineering leaders, and complete all the meet and greet scheduled last week.
* watch recent all hands with CEO ( Q3 2019- <https://freshworks.workplace.com/100024027468533/videos/520575392086705/>)
* Setup meet and greet with PM stakeholders of Freshsales - Aditi Balaji ,Swati Sharma.
* Get VPN Access based on the need, now or a bit later
* Attend engineering walkthrough (conducted by EM - Vijay)

### **Week 3**

* Start attending the daily stand up with an identified squad(s), spring planning and retro.
* Schedule meeting with fellow managers, architects and stakeholders to understand more about the product , technology and working rhythm
* Talk to product team, get any 5 customers randomly in different size and from different vertical and understand our customers business and how they are using our product
* Get more details on what other products we are building here
* Meet and greet with TPMs from other related teams - FreshReports - Rajeswar Subramani , FreshID - Bavya Venkateswaran , CPO office - Janani Jayaraman

### **Week 4**

* Get support portal access. ‘[Support.freshdesk.com](http://support.freshdesk.com/)’. Raise a ticket to IT in Lighthouse.
* Understand about Aspirations  - Aspirations deck - <https://drive.google.com/drive/folders/1XwU5HQ_87mttkg_HBFhwor0PpiKE4D9T>
* Go through the Annual Operating Plan -  <https://docs.google.com/document/d/13eGwch31TmZGuEbmsjMBeebJYLhRQQeu_bv2GJWw01I/edit?ts=5dfb09f3>
* Define your month 2 and month 3 goals with your manager
* Meet InfoSec team, understand more about InfoSec - Contact person Suryakanth
* Meet the platform team, at least the platform services we are using for our product so far - Name the teams and contact folks
* Access to performyard - <https://talent.performyard.com/> and review your team members goals, and set your goals
* Access to expense report [https://app.fyle.in](https://app.fyle.in/)

### **Month 2**

* Go through the Indian Democratic design doc - <https://demdesign.in/>
* Meet and greet with STS
* Meet and greet with Shuveb Hussain , Jeykar Watson , Anandh  Mahalingam
* Discuss with your manager and identify one squad whose meetings you can attend

                        Attend the standups , retro , sprint planning meetings of that squad

                        Observe and bring in best practices and ensure that they are following the Freshwave agile rhythm

* Start working on an initiative (e.g. FreshSales - FreshReport Integration)

                        Work with squads, EM , PM of FreshSales and EM, TPM of the other team as well (in this case Freshreports)

                        Prepare a weekly report of the program summary , current status , risks , dependencies for the initiative and mail it to all stake holders

                        Have a weekly ot bi-weekly sync up meeting with both team stake holders to know the status of various action items

* Conduct and host a weekly Engineering Program meeting

                        1 hour every week with all Fsales engineering leads

                        Status of various initiatives/features , ETA , path to green , risks

### **Month 3**

* Read up on OKRs - <https://confluence.freshworks.com/display/SEO/Freshworks+OKR+Playbook>
* Manager will walk through the company’s OKRs for the year and based on that define your own OKRs and Key Results
* Start working on multiple feature/initiatives that are in progress
* Prepare data for the Monthly Ops meeting

Status Reporting - Key Points to Note

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Program Level Status | **ON TRACK / SLIGHTLY DELAYED / RISK / ON HOLD / COMPLETED** | | | | | |
| Current Execution Stage | I2P | GROOMING | DEV | TESTING | STAGING | DONE |
| Design In Progress | Ready for Grooming | In Progress | Branch Testing | Stage Testing | Released |
| Solutioning In Progress | In Grooming |  | Ready for Staging | Ready for Prod deploy |  |

## **Please read this**[**Freshsales Engineering Onboarding Guide**](https://confluence.freshworks.com/display/freshsales/Freshsales+Engineering+Onboarding+Guide)

YOH - Your Onboarding Handbook <Draft Notes - Work in Progress>

Org Onboarding (HR)

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BU Onboarding (SS)

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Role Onboarding (OS - EM, FSA, SL, SET, TPM)

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Squad Onboarding (SL)

**Org Onboarding (HR)**

(2 days)

**BU Onboarding (SS)**

(3 days)

1. Self Service Portal - PPT
   1. Buddy Assignment
2. Product Core Features Demo

**Role Onboarding (EM, FSA, SL, SET, TPM)** [Come up with a pool of Onboarding Specialists]

(5 days)

1. Channels / DL's
2. Stakeholders / Org Chart
3. Role Essentials - Accesses / Softwares
4. Ways of Working

**Squad Onboarding (SL)**

(10 days)

* 30/60/90 day Plan
* Squad Specific Plan

Forum

30/60/90 day Feedback -

Star Buddy for Every Month

Overall Plan

30 days - **KT**

60 days - **Shadow**

90 days - **Reverse Shadow**