Task Nomenclature

***Please note this is the final task nomenclature document to be followed. For subtasks, please see the subtask nomenclature document here. Other ClickUp SOPs, aside from nomenclature, that are mentioned in the document on ClickUp should also be noted.**

SPACE: ALL CLIENT SPACES – Billable (e.g., Homemade Method, Lulusar etc)

1. **Meetings**

Definition: These encompass all internal meetings (where attendees are Data Pilot team members) and meetings with clients, whether scheduled or unscheduled.

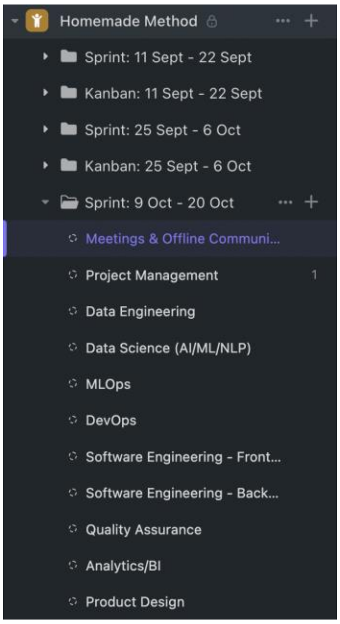
Process tip: Book all meetings on the calendar, including unscheduled meetings, so all attendees are aware the meeting needs to be logged in the Meetings list.

Format: [Meeting Type] - [Meeting Subject]

Example - Internal Meeting: Internal Meeting - Daily Stand-up

Example - Client Meeting: Client Meeting - Weekly Stand-up

- ★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Meetings & Offline Communication** list (in Sprint or Kanban folder as needed):



2. **Offline Communication**

Definition: Written communication done via platforms such as Slack, Teams, or email. Includes both internal communication (where participants are Data Pilot team members) and communication with clients.

Process tip: When starting a conversation thread, take note of the timestamp. Complete the conversation and log time manually. (Try not to switch between multiple conversations. If switching is unavoidable, keep track of overall time spent and distribute the time between conversations when logging manually according to your best approximation.)

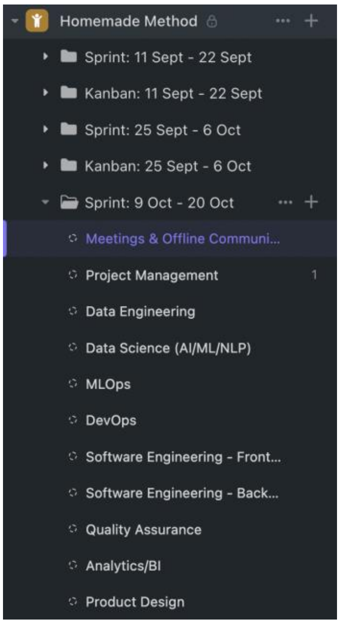
Format: [Communication Type] - [Communication Platform] - [Brief Description]

Commented [AM1]: @Manaal Shuja is communication platform neccessary? how is this going to help you? generally asking

Example - Internal Communication: Internal Communication - Teams - Data Validation Discussion

Example - Client Communication: Client Communication - Slack - Data Validation Discussion

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Meetings & Offline Communication** list (in Sprint or Kanban folder as needed):



3. **Estimation - Existing Client**

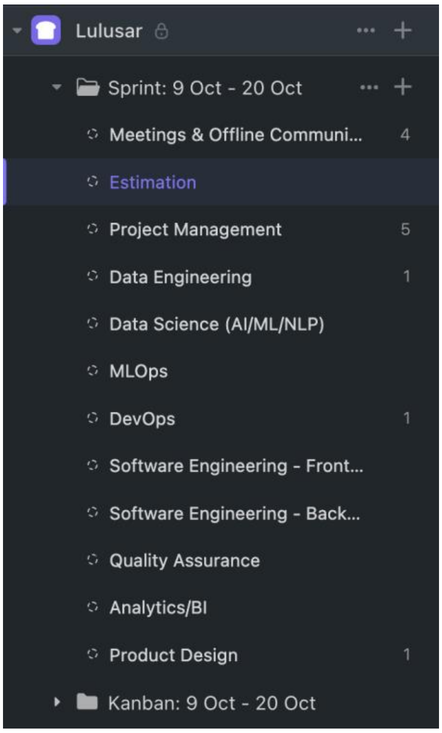
Definition: Drafting time estimates for a particular project for an existing client with task breakdown and assumptions. This is logged inside the existing project space e.g. estimation for Benzinga dashboards will be logged in the 7 knots space.

Format: Estimation - [Brief Description]

Example: Estimation - Dashboard Development for 20 KPIs

> **Commented [MS2]:** @Adeel Mankee You mentioned having 3 levels here. including estimation task type. My thinking was that this only includes one task type which is estimating a task (not including any preparatory steps like research or req gathering). Hence 2 levels only.

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Estimation** list (in Sprint or Kanban folder as needed):



4. **Requirement Gathering - Existing Client**

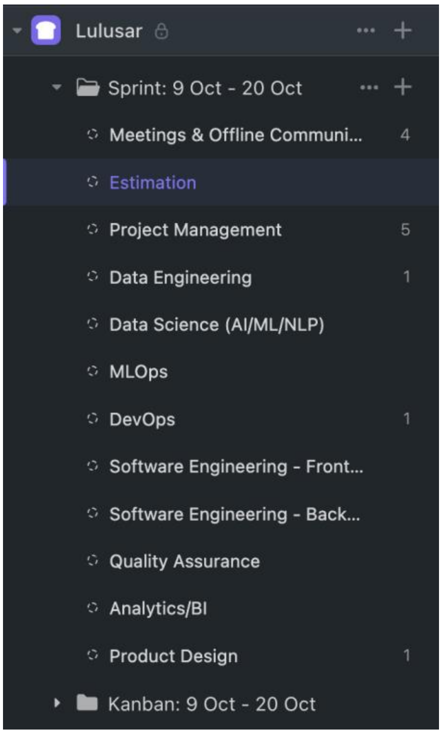
> **Commented [MS3]:** @Adeel Mankee I agree that this is separate as req gathering may be done as the first step in a paid project as you said. I think we can have a separate list for Requirement Gathering so that the separation is very clear.

Definition: Reading and/or researching a new project for an existing client to understand client requirements for that project. This is logged inside the existing project space e.g. requirement gathering for Benzinga dashboards will be logged in the 7 knots space.

Format: Requirement Gathering - [Brief Description]

Example: Requirement Gathering - User Authentication

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Estimation** list (in Sprint or Kanban folder as needed):



Note: Requirement Gathering can also be a standalone list inside a project space, task to be written following the format above.

5. Data Engineering

Definition: All data engineering related tasks such as ETL and pipeline development, including any preparatory work for data engineering e.g. establishing API connection.

Format: [Task Type] - [Brief Description]

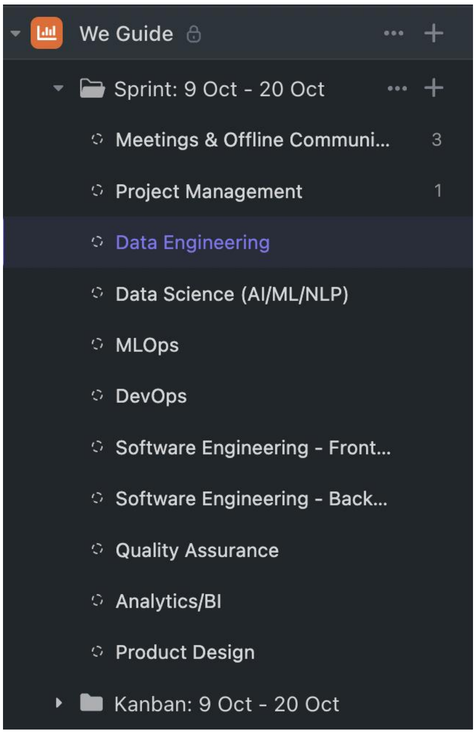
Examples:

ETL - Facebook to MySQL using Python

ETL - Facebook to MySQL using Fivetran

ERD - Database modeling for AWS MySQL RDS

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Data Engineering** list (in Sprint or Kanban folder as needed):



6. **Data Science (AI/ML/NLP)**

Definition: All tasks relating to the development of machine learning models, natural language processing algorithms and AI solutions - including any preparatory work such as data cleanup or categorisation.

Format: [Task Type] - [Brief Description]

Examples:

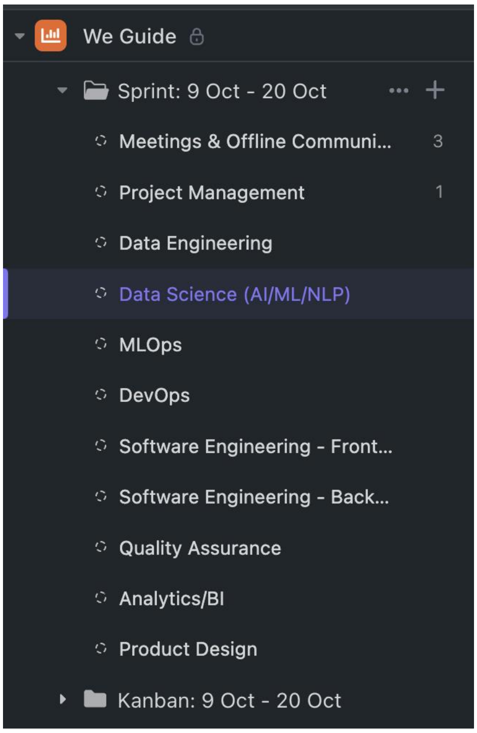
AI - Stream optimization using Python

ML - Customer Churn Model Training

AI - Predict Customer Churn using Python on AWS

AI - Build computer vision model for defect detection on Azure

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Data Science (AI/ML/NLP)** list (in Sprint or Kanban folder as needed):



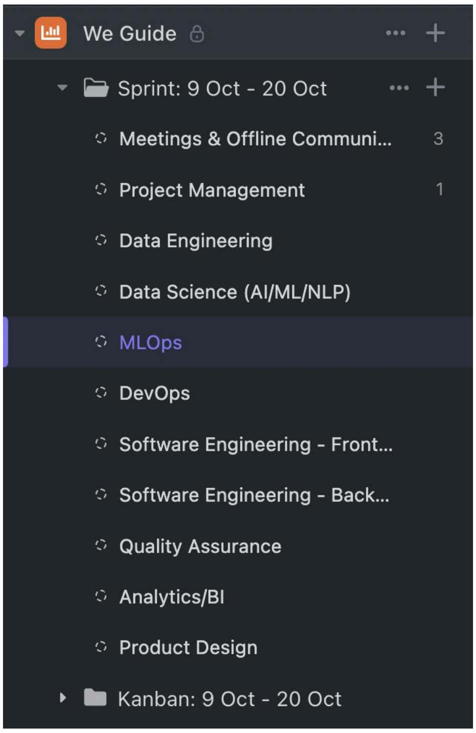
7. **MLOps**

Definition: All tasks relating to Machine Learning operations, from model deployment to maintenance and monitoring.

Format: [Task Type] - [Brief Description]

Example: Deployment - Deploy ML Model for Customer Churn on AWS

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **MLOps** list (in Sprint or Kanban folder as needed):



8. DevOps

Definition: All tasks relating to deployment of pipelines or user applications, management of cloud infrastructure, and maintenance and monitoring.

Format: [Task Type] - [Brief Description]

Examples:

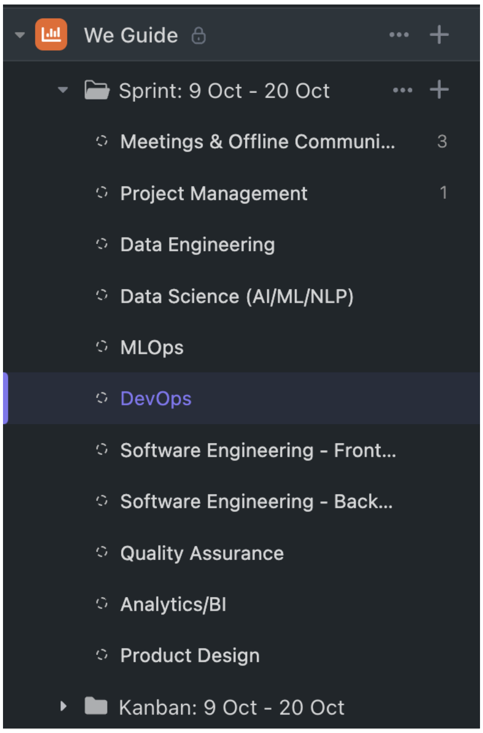
Create IAM Roles - Define Permission Roles

User Setup - Establish user accounts and permissions.

Attach Policies - Link policies to roles.

Note: Here are the 140 examples of DevOps tasks.

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **DevOps** list (in Sprint or Kanban folder as needed):



9. **Software Engineering - Frontend**

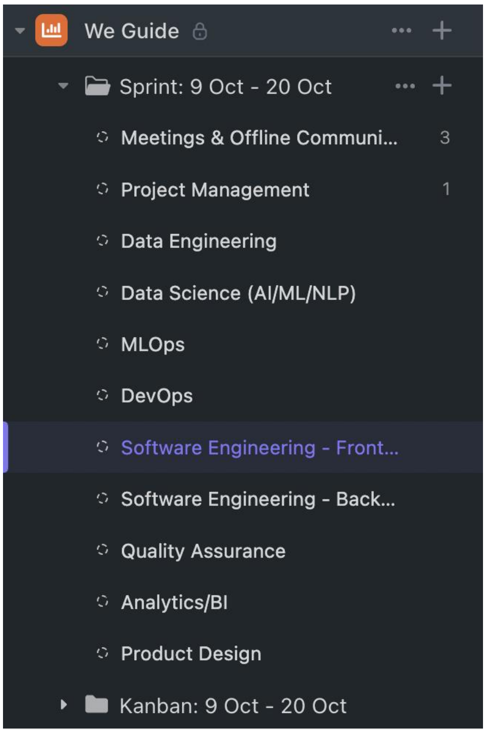
<u>Definition:</u> Frontend engineering tasks to do with creating and implementing UI/UX.

<u>Format:</u> [Task Type] - [Brief Description]

<u>Example:</u> Frontend – Implement Landing Page Using React

Commented [MS4]: @Adeel Mankee Have changed this example as per feedback and moved the design example to the Product Design

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Software Engineering – Frontend** list (in Sprint or Kanban folder as needed):



10. **Software Engineering - Backend**

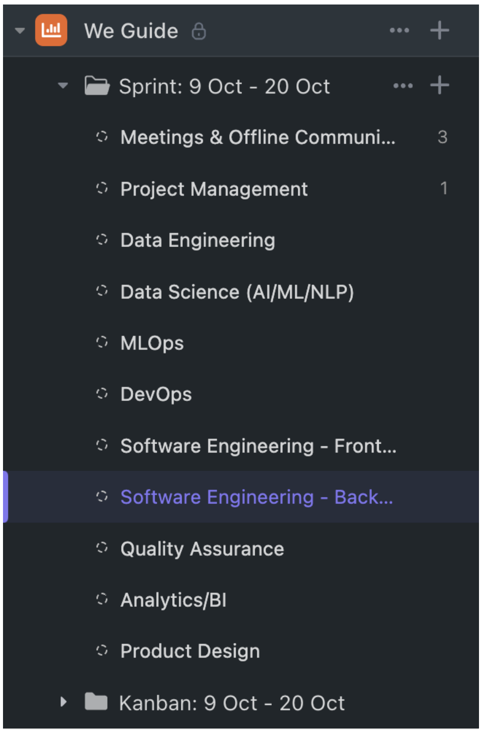
Definition: All software engineering tasks related to the backend e.g., API development.

Format: [Task Type] - [Brief Description]

Example: Backend - Pipeline Optimization using FastAPI

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Software Engineering - Backend** list (in Sprint or Kanban folder as needed):

Commented [AM5]: @Manaal Shuja "All backend tasks for a software engineering product" could be misleading. Please change it to something like "All software engineering tasks pertaining or related to the backend e.g. API development "



11. **Quality Assurance**

Definition: All tasks to do with quality assurance (QA), including code review, data validation or design QA for dashboards, and QA testing for applications.

Format: [Task Type] - [Brief Description]

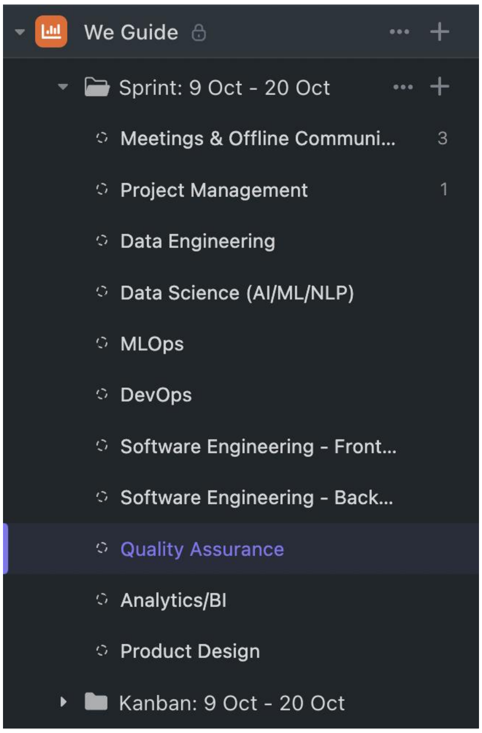
Examples:

Code Review - Facebook Script

Data Validation - Validate Facebook Data in Google Bigquery

Design QA - Subscription Analytics Dashboard

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Quality Assurance** list (in Sprint or Kanban folder as needed):



12. **Analytics/BI**

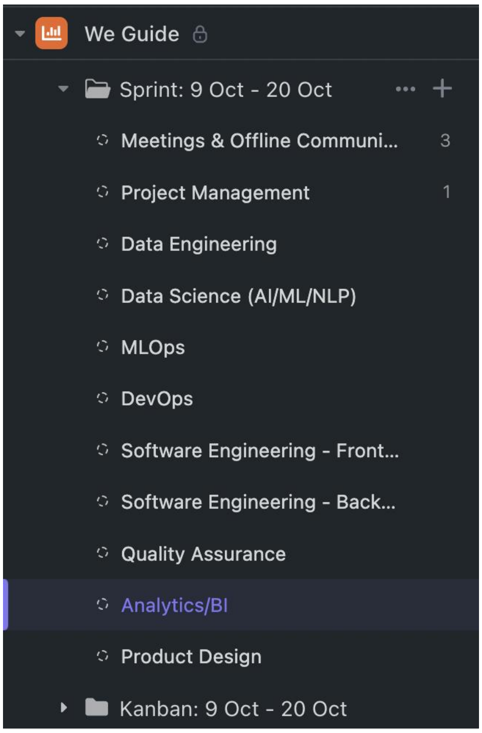
Definition: All tasks related to analytics and BI, including dashboard development and data analysis.

Format: [Task Type] - [Brief Description]

Example: Dashboard Development - Subscription Analytics Dashboard on Tableau Containing 20 KPIs

★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Analytics/BI** list (in Sprint or Kanban folder as needed):

Commented [AM6]: @Manaal Shuja not just dashboard development, it could be anything related to analytics, data analysis even if it's in Excel, or tool based BI, e.g. the the 7 Knots task that came and it was just Excel based analysis



13. **Product Design**

Definition: All tasks relating to product design, including user research, low fidelity design i.e., wire-framing and high-fidelity design i.e., final user interface given to frontend team for implementation.

Format: [Task Type] - [Product Description]

Example:

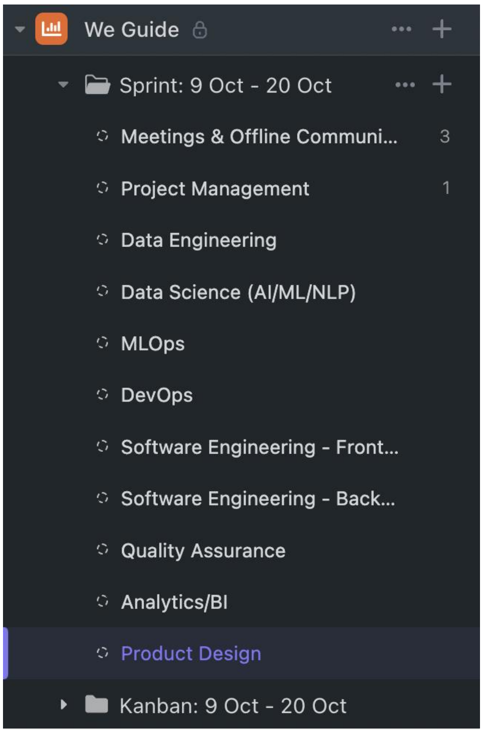
Wire-framing - Subscription Analytics Dashboard Containing 20 KPIs

High-fidelity Design – Website Signup Page

Commented [AM7]: @Manaal Shuja you can also add low fidelity design (which is wireframing or mockups) and high fidelity design which are the final UIs given to front end engineer for implementation

Commented [MS8]: @Adeel Mankee is this example ok?

- ★ **Where to log these tasks on ClickUp?** Go to the relevant client/project space such as Homemade Method or Tripe Tree and select the **Product Design** list (in Sprint or Kanban folder as needed):



SPACE: PRESALES & POCs [Non-billable]

10. Project Estimation Tasks - Pre-sales

Definition: Drafting time estimates using the estimation template for a project for a new client as part of the pre-sales process. This would be logged in Pre-sales & POCs [Engineering] space, in the relevant pre-sales client list.

Format: Estimation - [Brief Description]

Example: Estimation - Dashboard Development for 20 KPIs

★ **Where to log these tasks on ClickUp?** Go to the Pre-sales & POCs [Engineering] space and select the **relevant pre-sales client** list (in Sprint or Kanban folder as needed):

Commented [AM9]: @Manaal Shuja POCs can be of two types: paid and unpaid so how do we define that here? I guess the paid POCs just go in the respective client space. Yea got it, I think that's what you and decided when we spoke last time about this

Commented [MS10R9]: Yes once the work becomes paid then we start logging in the project space. This space is for non billable work - I've marked it thus in the heading beside space title.

11. **Requirement Gathering - Pre-sales**

Definition: Reading and/or researching a project for a new client to understand client requirements for that project. This would be logged in Pre-sales & POCs [Engineering] space, in the specific pre-sales client list created.

Format: Requirement Gathering - [Brief Description]

Example: Requirement Gathering - User Authentication

Commented [AM11]: @Manaal Shuja are people expected to write a brief line or two in the description as well or whatever description is in the name is suffice? It's not clear in any task if that extra description is required or not.

Commented [MS12R11]: @Adeel Mankee Description is required in most cases yes. In the ClickUp SOPs doc we have mentioned that a one liner should be added in description box but I haven't addressed it in this doc as I didn't want there to be any confusion between task nomenclature and description.

My thoughts are description should be added only in tasks where a process needs to be followed to complete the task and the process is too lengthy or complex to be described in the task title.

★ **Where to log these tasks on ClickUp?** Go to the Pre-sales & POCs [Engineering] space and select the **relevant pre-sales client** list (in Sprint or Kanban folder as needed):

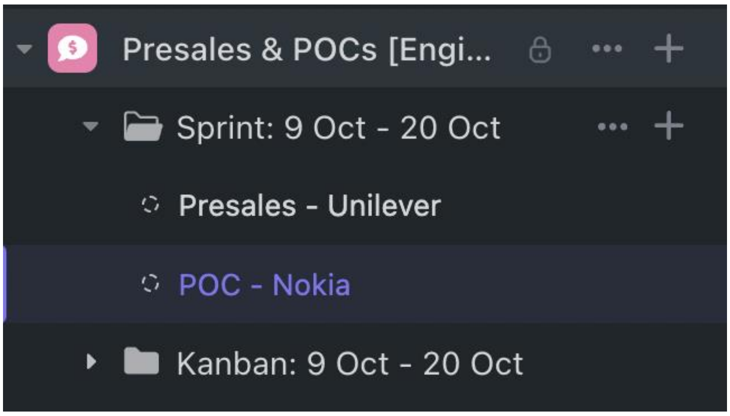
12. **POC Development - POCs**

Definition: Development efforts to create a POC. This would be logged in Pre-sales & POCs [Engineering] space, in the specific POC client list created.

Format: [Task Type] - [Brief Description]

Example: ETL - Facebook to MySQL using Python

★ **Where to log these tasks on ClickUp?** Go to the Pre-sales & POCs [Engineering] space and select the **relevant POC client** list (in Sprint or Kanban folder as needed):



**Meetings & offline communication will be logged using the nomenclature defined above for client spaces. Unlike a client space, there will not be a separate Meetings list, instead these should be logged in the client specific lists as shown above using the [Meeting Type] - [Meeting Subject[format.*

SPACE: TRAINING [Non-billable]

Training

Definition: Tasks to do with personal development will be logged here. This includes self-paced study on platforms such as Coursera, in-house training sessions with the team, and external webinars or conferences. The nomenclature for each of these categories is listed below.

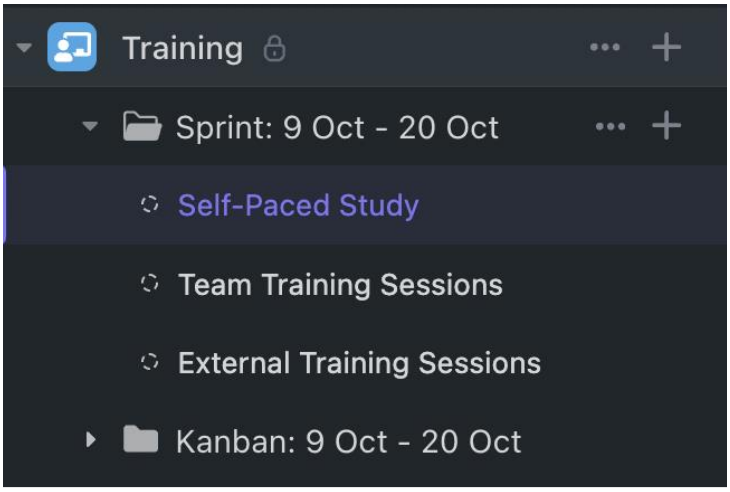
13. **Self-Paced Study**

Definition: Courses taken on learning platforms such as Coursera and Udemy or informational videos watched on YouTube.

Format: Self-Paced Study - [Course or Video Title] on [Learning Platform]

Example: Self-Paced Study - Python Fundamentals on Coursera

★ **Where to log these tasks on ClickUp?** Go to the **Training** space and select the **Self-Paced Study** list (in Sprint or Kanban folder as needed):



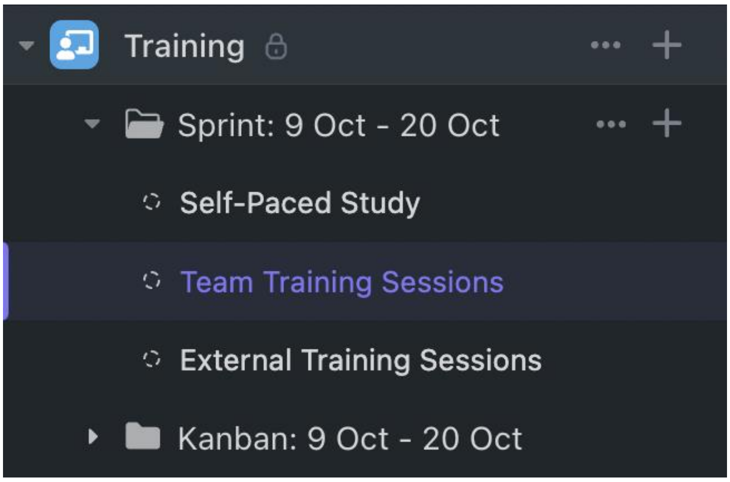
14. **Team Training Sessions**

Definition: Collective team training sessions that take place at DP HQ.

Format: Team Training - [Brief Description]

Example: Team Training - Data Storytelling

★ **Where to log these tasks on ClickUp?** Go to the **Training** and select the **Team Training Sessions** list (in Sprint or Kanban folder as needed):



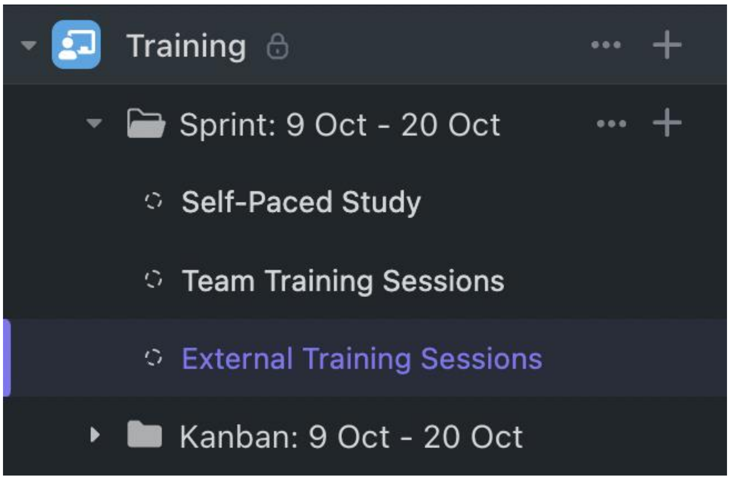
15. **External Training Sessions**

Definition: Training sessions organised by any external body that take place in a physical or online setting.

Format: External Training - [Organiser] - [Brief Description]

Example: External Training - ClickUp - Project Management Guidelines

★ **Where to log these tasks on ClickUp?** Go to the **Training** and select the **External Training Sessions** list (in Sprint or Kanban folder as needed):



SPACE: RECREATION & ADMINISTRATION [Non-billable]

16. **Administrative Tasks**

Definition: These include day to day administrative tasks performed by all team members such as:

(i) Events & Travel

Definition: Meeting room reservations, event planning and making travel arrangements.

Format: [Task Type] - [Brief Description]

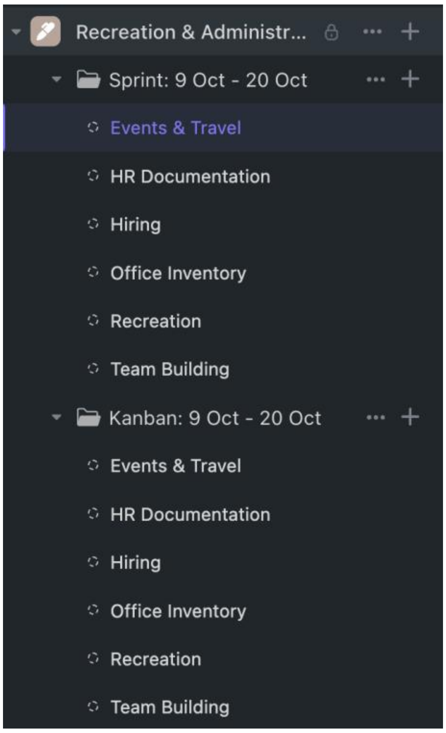
Examples: (Based on each of the 3 categories mentioned in the definition)

Room Reservation - Biweekly Training

Event Planning - Preparing Budget Plan for Team Dinner

Travel Arrangements - Researching Flight Information for PSW Trip

★ **Where to log these tasks on ClickUp?** Go to the **Recreation & Administration** space and select the **Events & Travel** list (in Sprint or Kanban folder as needed):



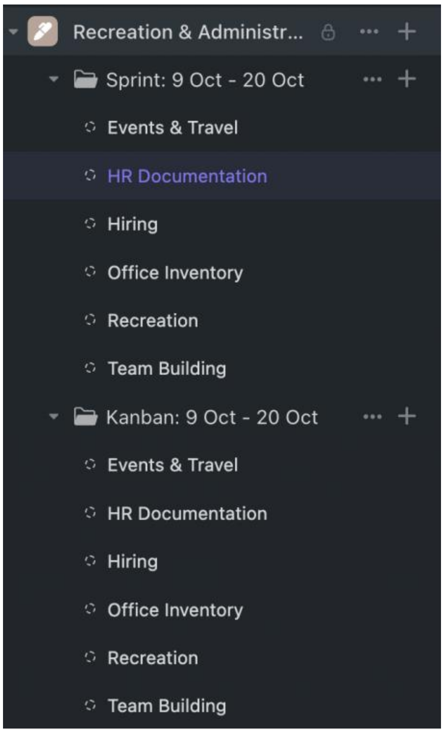
(ii) HR Documentation

Definition: Compiling and submitting HR documents.

Format: HR Documentation - [Document Type]

Example: HR Documentation - Annual Leave Application

★ **Where to log these tasks on ClickUp?** Go to the **Recreation & Administration** space and select the **HR Documentation** list (in Sprint or Kanban folder as needed):



(iii) Hiring

Definition: Assisting HR with sourcing (searching for candidates using LinkedIn or other channels), screening (resume review) and interviewing candidates.

Format: [Task Type] - [Role]

Examples: (Based on each of the 3 categories mentioned in the definition)

Talent Sourcing - HR & Ops Manager

Candidate Screening - HR & Ops Manager

Interview - HR & Ops Manager

★ **Where to log these tasks on ClickUp?** Go to the **Recreation & Administration** space and select the **Hiring** list (in Sprint or Kanban folder as needed):

(iv) Office Inventory

Definition: This may involve checking office stationery and snack supplies and placing orders.

Format: [Task Type] - [Supply Type]

Examples:

Inventory Assessment - Office Snacks

Inventory Purchase - Office Snacks

★ **Where to log these tasks on ClickUp?** Go to the **Recreation & Administration** space and select the **Office Inventory** list (in Sprint or Kanban folder as needed):

17. Recreation & Team Building

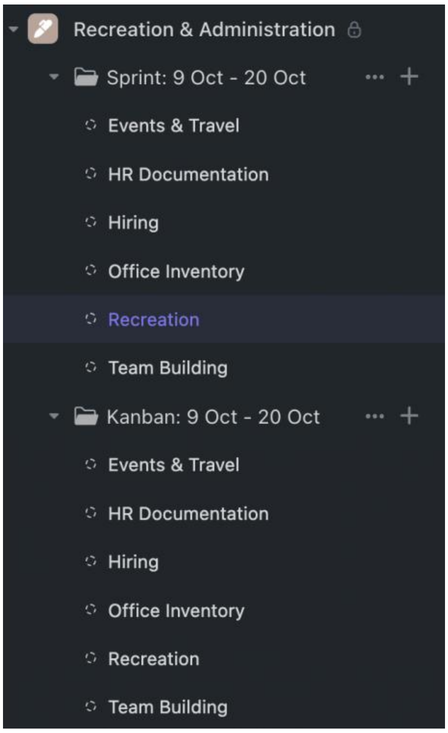
(i) Recreation

Definition: Activities such as games, outings or in-office get togethers undertaken for the purposes of fun and leisure. Recreation also includes personal time taken by an individual for the same purpose.

Format: Recreation - [Activity Type]

Examples: Recreation - Lunch Outing

★ **Where to log these tasks on ClickUp?** Go to the **Recreation & Administration** space and select the **Recreation** list (in Sprint or Kanban folder as needed):



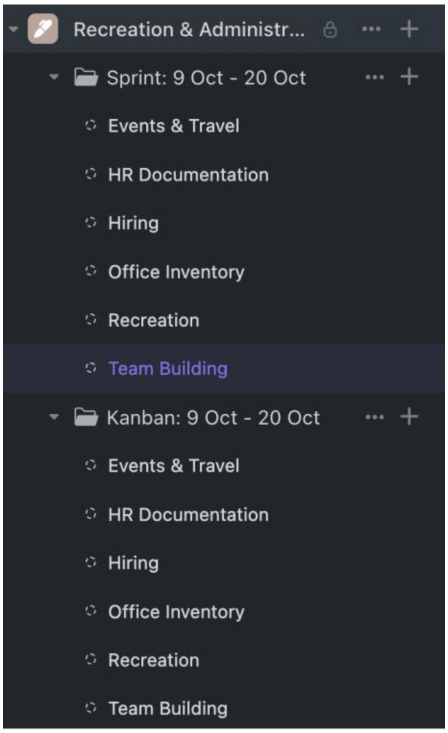
(ii) Team Building

Definition: Games and exercises that the team partakes in usually to enhance team performance and trust to better meet business objectives.

Format: [Team Building] - [Activity Type]

Examples: Team Building - Escape Room

★ **Where to log these tasks on ClickUp?** Go to the **Recreation & Administration** space and select the **Team Building** list (in Sprint or Kanban folder as needed):



Meetings & offline communication will be logged using the nomenclature defined above for client spaces. Please note unlike a client space, there will not be a separate list for Meetings, instead those will be logged in the list that the meeting is related to e.g., a meeting related to event planning would be logged in **Events & Travel using the [Meeting Type] - [Meeting Subject] format.*

SPACE: SPRINT SESSIONS

Sprint Sessions [Engineering]

Definition: These include all sprint sessions conducted within the duration of a 2-week sprint with the engineering team, such as;

(i) Sprint Pre-Planning

Definition: This is the session held prior to sprint opening to plan sprint individually and/or with one's team members, to present to all stakeholders in sprint opening (dev team usually has this session 10 am to 12 pm every second Monday).

Format: Internal Meeting - [Meeting Subject]

Example: Internal Meeting – Sprint Pre-Planning

★ **Where to log this on ClickUp?** Go to the **Sprint Sessions** space and select the **Sprint Sessions [Engineering]** list (in Sprint folder):

(ii) Sprint Opening

<u>Definition:</u> All team members sit together with project management team to review sprint plan and make any changes as required.

<u>Format:</u> Internal Meeting - [Meeting Subject]

<u>Examples:</u> Internal Meeting – Sprint Opening

★ **Where to log this on ClickUp?** Go to the **Sprint Sessions** space and select the **Sprint Sessions [Engineering]** list (in Sprint folder):

(iii) Sprint Closing

<u>Definition:</u> This is the last sprint session of a sprint in which engineering and PRJM teams sit together to review the sprint.

<u>Format:</u> Internal Meeting - [Meeting Subject]

<u>Examples:</u> Internal Meeting – Sprint Closing

★ **Where to log this on ClickUp?** Go to the **Sprint Sessions** space and select the **Sprint Sessions [Engineering]** list (in Sprint folder):

(iv) Daily Standup

<u>Definition:</u> This is the daily update that takes place throughout the sprint.

<u>Format:</u> Internal Meeting - [Meeting Subject]

<u>Examples:</u> Internal Meeting – Daily Standup

★ **Where to log this on ClickUp?** Go to the **Sprint Sessions** space and select the **Sprint Sessions [Engineering]** list (in Sprint folder):

Sprint Sessions [Product, Mtkg & Pre-sales] - Non-billable

<u>Definition:</u> These include all sprint sessions conducted within the duration of a 2-week sprint with the product, marketing and pre-sales teams, such as;

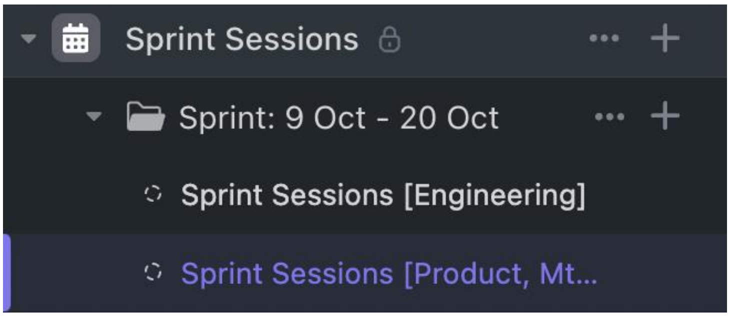
(i) Sprint Pre-Planning

Definition: This is the session held prior to sprint opening to plan sprint individually and/or with one's team members, to present to all stakeholders in sprint opening (usually done 10 to 11 am every second Monday).

Format: Internal Meeting - [Meeting Subject]

Example: Internal Meeting – Sprint Pre-Planning

★ **Where to log this on ClickUp?** Go to the **Sprint Sessions** space and select the **Sprint Sessions [Product, Mtkg & Pre-sales]** list (in Sprint folder):



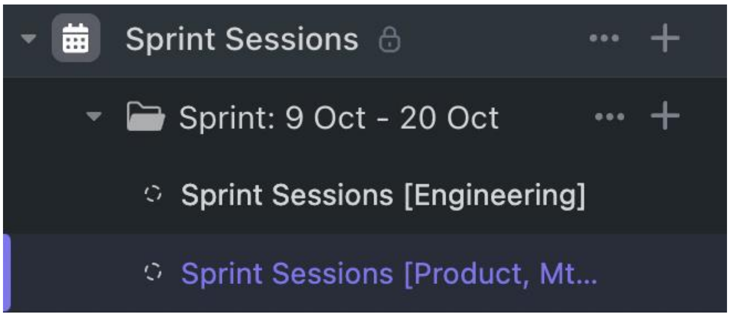
(ii) Sprint Opening

Definition: All team members sit together with Adeel and Ali to review sprint plan and make any changes as required.

Format: Internal Meeting - [Meeting Subject]

Examples: Internal Meeting – Sprint Opening

★ **Where to log this on ClickUp?** Go to the **Sprint Sessions** space and select the **Sprint Sessions [Product, Mtkg & Pre-sales]** list (in Sprint folder):



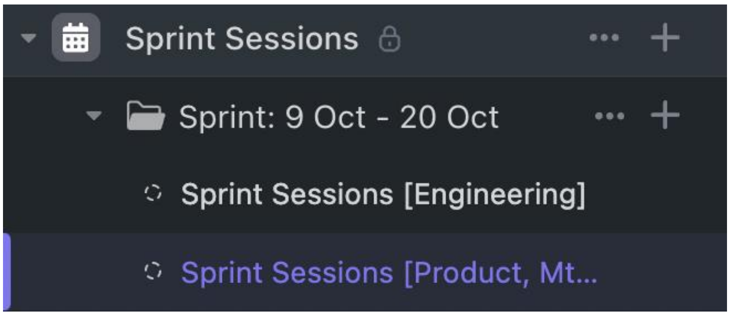
(iii) Sprint Closing

Definition: This is the last sprint session of a sprint in which all team members sit with Ali and Adeel to review the sprint.

Format: Internal Meeting - [Meeting Subject]

Examples: Internal Meeting – Sprint Closing

★ **Where to log this on ClickUp?** Go to the **Sprint Sessions** space and select the **Sprint Sessions [Product, Mtkg & Pre-sales]** list (in Sprint folder):



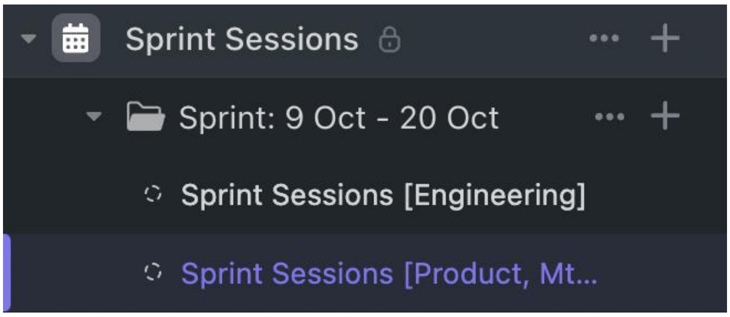
(iv) Daily Standup

Definition: This is the daily update that takes place throughout the sprint.

Format: Internal Meeting - [Meeting Subject]

Examples: Internal Meeting – Daily Standup

★ **Where to log this on ClickUp?** Go to the **Sprint Sessions** space and select the **Sprint Sessions [Product, Mtkg & Pre-sales]** list (in Sprint folder):



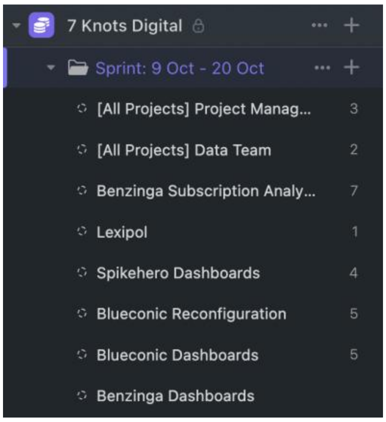
SPACE: 7 KNOTS DIGITAL

Commented [MS13]: @Adeel Mankee There is a separate section for 7 knots

The 7 knots space is structured differently than other client spaces – sprint and kanban folders are the same, but the list breakdown is different. 7 knots is working with multiple clients, and we want to treat those as separate projects.

Here is the current list breakdown (this will change as clients are added/removed):

1. Blueconic Dashboards
2. Blueconic Reconfiguration
3. Spikehero Dashboards
4. Lexipol
5. Benzinga Subscription Analytics
6. Benzinga Dashboards
7. [All Projects] Project Management (Weekly Standups attended by project manager logged here)
8. [All Projects] Data Team (Weekly Standups attended by data team logged here)



Task Nomenclature to be used in each list:

<u>Format:</u> [Task Type] - [Brief Description]

<u>Examples:</u>

ETL - Facebook to MySQL using Python

ERD - Database modeling for AWS MySQL RDS

Code Review - Facebook Script

Data Validation - Validate Facebook Data in Google Bigquery

Meetings Nomenclature to be used in each list:

Format: [Meeting Type] - [Meeting Subject]

Example - Internal Meeting: Internal Meeting - Daily Stand-up

Example - Client Meeting: Client Meeting - Weekly Stand-up

Offline Communication Nomenclature to be used in each list:

Format: [Communication Type] - [Communication Platform] - [Brief Description]

Example - Internal Communication: Internal Communication - Teams - Data Validation Discussion

Example - Client Communication: Client Communication - Slack - Data Validation Discussion