Arcanium.io

Team Leader Guide

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Estimate Template

Team Lead Guide

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We create products that investors and clients love

Our History

Arcanium is a rock solid USA based tech team at your disposal. Our team comes from a startup background, having built everything from phone systems to artificial intelligence and real-time web applications. Nick Bryant, the CEO, was a senior engineer at Sharpspring.com, Outreach.io and NASA Ames prior to starting Arcanium.

Our team includes a few Ph.Ds, embedded & web engineers and fortune 500 consultants.

Onboarding Guide

Onboarding Checklist

- For the team lead
  - Initial meeting with mentor
  - Review Processes & Procedures
  - Create <firstname>.<lastname>@arcanium.io email
  - Finalize team's offerings & rate table
  - Schedule biweekly 1 on 1 with mentor
  - Bookmarks:
    - Business Administration Board
    - Team Lead Packet
    - Onboarding/Offboarding Board
    - Up Coming Projects - Hubspot
    - Clockify
    - Project Estimate Template
- For each member of your team
  - Sign and return arcanium NDA to operations@arcanium.io
  - Provide payment details to operations@arcanium.io
  - Invite to Arcanium's Slack
  - Invite to Arcanium's Clockify
  - Invite to Arcanium's Bitbucket
  - Invite to Arcanium's Trello
  - Schedule biweekly 1 on 1

Processes & Procedures

Project Estimation / Architecture

- You will have received a notification on the **#partner-team-leads** channel in slack , notifying you of a new project in the pipeline

- Search for the trello card titled “Project Estimate - <Name of Project>” on the Business Administration Board
- Assign the trello card to yourself
- Download the latest estimate template from the website.
- Upload it to google drive and edit the document
- Click “Share” and make sure that the estimate is viewable by everyone.
- Copy the estimate link.
- Submit the estimate via Google Forms
- Move the trello card for the estimate to **Done**

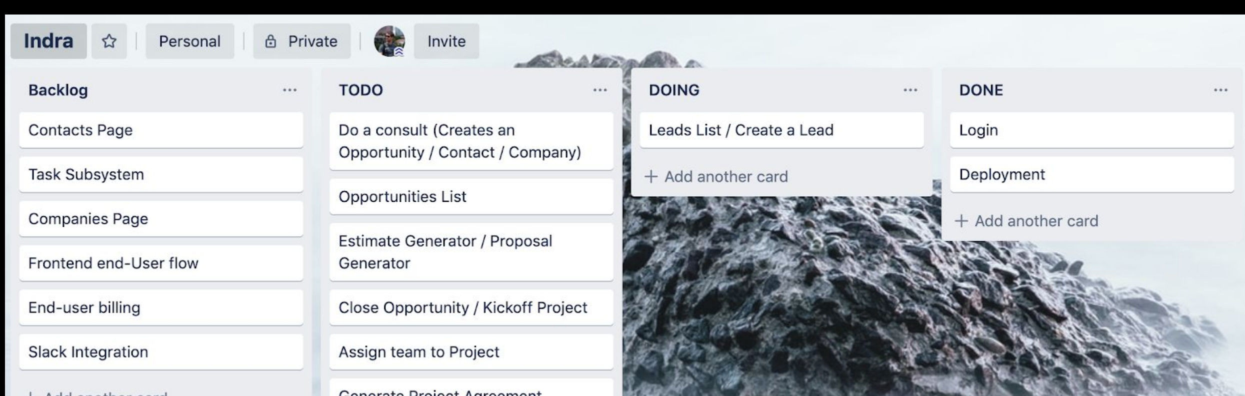
View Upcoming Projects

- Visit This Link in Hubspot to view projects which are coming up.
- Each project should have a link to the requirements document and a description.
- If you have more questions about a project, ask the salesperson/deal owner.

Project Management

These are just some recommendations for how to manage a basic project via Trello.

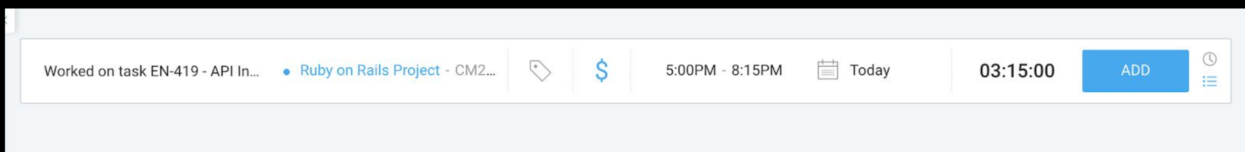
- An example trello board for a project is listed below



- Backlog contains tasks are not being done during this sprint or week.
- For most projects we can do a Kanban style of project management
- Cards should specify deliverables
- Once every two weeks you can set up a sprint
- Once every two weeks you can spend an hour or two grooming the backlog
- You can share the trello with the client so they have better visibility into the project.

Logging Hours

- Login to clockify.me/tracker
- Your current project should exist on the list of projects
- If your project does not exist, email operations@arcanium.io to fix it
- Select your current project
- Next to the "Add" button select the "list view" icon
- Put in a start and end time for your work
- Click the Dollar Sign for billable hours
- Put in a description of which tasks you worked on



Reviewing Team's Hours

On Friday every week:

- Login to clockify.me
- Click "Reports" -> "Detailed"
- Click "Teams" and filter by your team
- Review the time entries and make sure:
    - No team members logged over 12 hours in one day
- If a team member appears to have logged hours incorrectly:
    - Notify them via slack
    - We run invoicing on the 1st and 16th of every month
    - We run payroll on the 29th and 13th of every month
    - The hours need to be fixed before next payroll

1 on 1 Team Meeting

It's recommended that you schedule a biweekly 1 on 1 with each of your team members. This is a set time (usually 30-60 minutes) where your team members can bring up anything that's been bothering them. This is a huge boon to communication for remote teams.

For more information, see this reference.

Hire, Remove or Change a Team Member

Conducting an Interview

Conducting a Client Meeting

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