THE

ORANGE

BOOK



Introduction

**Purpose**

This manual is produced to clearly communicate the operational procedures of Rubico IT Private Limited as it works with Rubico Inc (collectively referred to as Rubico). It is meant to clear up any confusion over expectations and to promote harmony and efficiency within the workplace. In short, it is to direct the PCs and the teammates from the moment a project is handed to operations through its successful life cycle.

**Revisions**

Items in YELLOW are updates or revisions. New Versions are regularly released and the YELLOW highlighted sections describe the changes in policy so it is very easy for a person to understand what has changed.

**Comments**

Inserting comments is a great way to give feedback concerning this Orange book. When creating a comment, please start by typing +[Jason.Harsh@RubicoTech.in](mailto:James.Sudhir@rubicotech.in) so he will be notified of your comment. The Orange Book Editor will then follow up and consider your suggestions. Once the issue is finished, the Orange Book Editor will resolve it in order to keep the document cleaned up.

**Notes**

* The contents of this policy are subject to the laws and regulations of the government of India.
* The interpretation of this policy is solely performed by the Directors of Rubico IT Private Limited.
* The word “employee” in some instances may be referring to an intern or trainee or contractor.
* The word “Rubico” is referring to Rubico IT Private Limited and/or Rubico, Inc.

## Abbreviations

Business Development (BD)

* MSA: Master Services Agreement
* NDA: Non-Disclosure Agreement

Operations

* OPPM: One Page Project Management (a group of people who keep track of all the projects on a Google Sheet)
* KT: Knowledge Transfer
* UAT: User Acceptance Testing
* SEO: Search Engine Optimization
* DM: Digital Marketing
* NPN: New Project Notification

Roles

* PO: Product Owner
* PC: Project Coordinator
* TP: Tech Point
* SE: Software Engineer
* FE: Front-End Engineer
* Designer: UI UX Designer
* QA: Quality Assurance
* SA: Solutions Architect
* HR: Human Resource
* RM: Relationship Manager

Questionnaires

* CAQ: Competitive Analysis Questionnaire
* DMQ: Digital Marketing Questionnaire
* WDQ: Web Design Questionnaire
* MAQ: Mobile App Questionnaire
* LDQ: Logo Design Questionnaire
* WSQ: Website Support Questionnaire

## Compliance

What should you do if you see someone not following the policy?

* Go to them and discuss
* Remind them the Orange book is for everyone’s benefit
* If that still does not work then talk to HR or OPPM

# Organizational Team

There are three organizational teams that help provide direction and support for successful employees and successful projects. They are the Huddle, OPPM and Tech Team as discussed here.

## Membership

The Huddle, OPPM and Tech Team are individuals chosen to represent the interests of the broader Rubico IN Team. The following are qualities necessary to be a successful team member:

* **Commitment** - Committed to the growth and health of Rubico. Puts others ahead of self.
* **Competent** - Must be skillfully competent, a fast learner and find joy in building up others technically.
* **Caring** - Must be a good listener and deeply motivated to support others.

### Terms and Conditions for Membership

1. Team members are reviewed annually by the Executive team. Membership in a Team is a privilege and current members may not assume that they will always be reappointed.
2. For Huddle there is a recommended 2-year consecutive term limit for a Rubico Huddle team member with a gap of 1 year before being eligible for re-appointment.

Possible Reasons why a Team member may not be reappointed

* Leave room for another person to gain more leadership experience
* Lack of availability to engage the team either caused by geographic distance or simply not taking proper time
* Strategic need to focus on other parts of Rubico
* Lack of initiative or performance
* Etc.

### Purpose of Huddle, OPPM and Technical Training Group

| **Huddle** | **OPPM** | **Technical Training Group** |
| --- | --- | --- |
| * Identify Challenges & create a Strategy to overcome * Keeps OPPM and Technical Training Group accountable * Innovative Brainstorming * Leadership Development | * Project Productivity/Health * HR allocation and utilization * Keep the editors of organizational books accountable | * Technical Competency Development * Technical Roadmap |

### Chair Responsibilities

One individual will be defined as the “chair” of the team. The chair is responsible for:

* Scheduling and Organizing the Meetings
  + Defining the Agendas
  + Taking meeting notes during the meetings
  + Scheduling special “Problem Solving” meetings
* Keeping members accountable for their commitments
  + Make sure that the team works together to get the results

## Huddle Team

### Huddle Meetings

There are two types of meetings:

* Monthly 4 hours meeting
* Annually 2 days meeting

If you are currently facing a significant challenge, please share your challenge with a Huddle member so it can be addressed during our monthly Huddle meeting.

If a non-Huddle member would like to speak to the Huddle on a specific topic, please request an Agenda item to the Huddle Coordinator.

### Huddle Team

The 2025 (wef 1-Dec-2024) [Huddle Members](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.rmd3bithhmwu) include the following:

|  | **HDR** | **DDN** |
| --- | --- | --- |
| **Business Development** | Steve Surya | - |
| **Project Management** | - | - |
| **Development/**  **Technology/QA** | Max Gaurav  Michael Brown | Edwin Chandra |
| **Human Resources** | Kevin Kundan | Saahil Joshua |
| **Financial/Admin/RM** | Stan Gutwein | Carlos Bernal  Rich Paules (Chair) |

## OPPM Team

The OPPM philosophy is based upon a book named [The New One-Page Project Manager: Communicate and Manage Any Project With A Single Sheet of Paper](https://www.amazon.com/dp/B00AJ3J4QE/ref=dp-kindle-redirect?_encoding=UTF8&btkr=1). OPPM stands for “One Page Project Management”.

### OPPM Meeting

The OPPM (One Page Project Management) meetings are held weekly from each office (HDR/DDN).

The purpose of the meeting is:

* To bring attention to Projects facing challenges
  + Yellow - Team are solving the challenges
  + Orange - The RM is needed to overcome the challenges
* HR allocation for current and future projects

The OPPM meeting will not be a "deep" review of every project. If a "deep" review is needed of a project then a separate meeting with the PC should be scheduled.

OPPM team members are regularly (usually annually) reviewed.The 2025 (wef 1-Dec-2024) OPPM Members include the following:

| **Area of Representation** | **HDR** | **DDN** |
| --- | --- | --- |
| ***Project Management***   * Ensure the OPPM sheet is up to date * Identify project challenges, risks, and concerns * Keep PCs accountable * Suggest improvements to our management process | Jason Harsh | Chloe Sonakshi |
| ***Technical aspects of projec*ts**   * Identify challenges, risks & concerns with technical and QA * Keep Tech Points accountable * Suggest improvements to how we do projects in technical aspects | Luke Lokesh | Brandon George |
| ***Human Resource***   * Resource availability/engagement/ assignments/prioritization * Performance assessments * Recruitment updates | Kevin Kundan  (Chair) | Joshua Saahil |
| ***Sales/Pipeline***   * What projects are coming down the pipeline? * Staging projects for success * Supporting PCs when facing Client challenges | - | Alan Anil  (Chair) |
| ***RM representation***   * Define priorities in relationships that serve our Clients * Define expectations from the RM perspective | Carlos Bernal / Rich Paules | Carlos Bernal / Rich Paules |

## Technical Training Group

### TTG Responsibilities

The Tech Team meets weekly and has the following purposes and goals:

* Technical Competency Development
  + Provide technical guidance/support to the team and helping them to move from 1 → 2 → 3→ 4→ 5 on the [OPPM](https://docs.google.com/spreadsheets/d/1kBb5EbvCSWjRLcDLu3R0-oOgxbowTaEEg0BBijEIteI/edit#gid=1368702071)
  + Guiding both Freshers and experienced persons on a path of greater skill development
  + Assess and plan a strategy to achieve Billable Goals of each individual
    - Is a person not able to reach their goal because of a lack of technical skill? If so, how to help them improve?
    - Are individuals assigned to the correct project? If not, communicate with OPPM the possible alternative projects that would be beneficial.
  + Consider 3rd party resources (Live Trainings, Online Trainings)
    - Prepare and review the finalized list of 3rd party resources.
    - Who is assigned to which resources and were they helpful?
* Technical Roadmap
  + Define the roadmap for a specific domain/technology to develop the skills and execute it on projects and proposed it to the Huddle
  + Plan and execute required workshops defined in the Technical roadmap.
  + Research and development for the future cutting edge tools and technologies.

### Technical Training Group Members

The 2025 (wef 1-Dec-2024) Technical Training Group Members include the following:

| **DDN** | **HDR** |
| --- | --- |
| Cody Praveen | Dayton Vanshaj |

### Competency Scale

Competency will always contain an element of subjectiveness, but it’s important to have an understanding of our team’s competency in various technologies so that we can make well-informed decisions. We have created the following 5-point competency scale:

* Level 1 (Learner) Learning the domain
* Level 2 (Contributor) Contributing to projects
* Level 3 (Problem Solver) Contributing independently
* Level 4 (Leader) Leading projects
* Level 5 (SME) Subject Matter Expert

Each of these levels are defined more in detail in the [Purple Book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.4ygwjmgrfpf3).

## Group Meetings

The following table describes the types of regularly recurring meetings in Rubico:

| **Domain** | **Chair** | **Frequency\*** | **Meeting Notes\*\*** |
| --- | --- | --- | --- |
| Business Development Team Sync | Steve Surya | Weekly | [Notes](https://docs.google.com/document/d/1gPjzSCdbr2GtuNpUE7qvHl1Q43FM6S2xMQfXj-JDcxE/edit#heading=h.jddig6u4hsx4) |
| OPPM | Kevin Kundan (HDR)  Alan Anil (DDN) | Weekly | [Notes](https://docs.google.com/document/d/1NhtKtEMbEEQOTbKUjFHMgkPsfmjnOvW1O43Acw-3SSA/edit#heading=h.wz8ihoq6w33s) |
| OPPM PC Catch Up | Kevin Kundan (HDR)  Saahil Joshua (DDN) | Weekly | [Notes-HDR](https://docs.google.com/document/d/1hDng7ad-cfQIKxG5hLeurDvAiCMWfmBXxpeMwET9h1w/edit#heading=h.7tmy9bktchwe)  [Notes-DDN](https://docs.google.com/document/d/1OACLONi-ryb6h7XHdCgN53zbuwf3lnoDHLAxs96JPgg/edit#heading=h.igttnvnvh86t) |
| OPPM Audit | Kevin Kundan (HDR)  Chloe Sonakshi (DDN) | Twice a Month (HDR)  Weekly (DDN) | [Meeting Notes - HDR](https://docs.google.com/document/d/1GgLVoV1e23F65WFKzuT2a4FtM9VkJDF3EQUQ_1NMTvQ/edit#heading=h.emtb5qikovof)  [Meeting Notes-DDN](https://docs.google.com/document/d/1v2bqp6Msu00sv1EskWAOnC8VmrkOaWCNTpBONe_fkJU/edit) |
| Mobile | Marcus Manvindar | Monthly | [Notes](https://docs.google.com/document/d/1LETkaZIzpmO2GJsWL3Jtgl3_NboKhBaTw0V-qlDB2Ss/edit?ts=5892e759) |
| Network Infrastructure  (Green Book meeting) | Brandon George | Weekly | [Notes](https://docs.google.com/document/d/1dK1XKPBm_4lDGcermjSk4FFFW2i3_pNRQPqVY2eY8sU/edit) |
| Server/Cloud  (SIlver Book meeting) | Brandon George | Weekly | [Notes](https://docs.google.com/document/u/0/d/1cI3_0VObKeY0LTkK_Bx_2ylYnQTa4-FW0YBDCElvYvc/edit) |
| Quality Assurance | Jennifer Gunjan (HDR)  Asher Ashutosh (DDN) | Monthly | [Notes](https://docs.google.com/document/d/1yUqSwin5qKYcz8aJeAAGj31fNem8di1Boky_bTySkcE/edit#heading=h.hw8q7uatko98)  [Meeting Notes - HDR](https://docs.google.com/document/d/1TDib3BkcdjkEu0VJ7ibWWm8nZ-pyIkYPDgmp4z6eTdg/edit#heading=h.324wrzio9r8c) |
| HR | Kevin Kundan | Weekly | - |

\* Repeating meetings should be scheduled by the Coordinator on the calendar according to the frequency.

\*\* All Meeting Notes doc should have:

* Dates
* Names
* Agendas
* To-dos

# Accountability Structure

Accountability is an organization’s friend. It is one key to make an organization operate effectively.

## Accountability Means

* Answerability
* Responsibility
* Liability

We all are answerable to our Clients and ultimately accountable to God for our actions and attitudes.

## How Will You Be Kept Accountable?

The majority of team members are kept accountable to work on specific tasks by the following tools:

* Club
* The Client’s PM Tool (Trello, Jira, etc)
* The Bug Tracker: Bug Herd/Gitea
* Google Sheets (OPPM, Checklist, etc.)
* Master Doc (agenda/todos)

Meetings also keep each other more accountable:

* Client Meetings
* Standup Meetings

OPPM / HR / Admin brings accountability by

* Measuring and evaluating performance
* Giving feedback (verbal and written)
* Coaching an individual who needs greater accountability

## Feedback Goes Both Ways

We are answerable to each other. Authority goes from left to right (see Accountability Charts section below). The people on the left have authority (which is granted not by their positional title, but by their virtue of desiring to serve the people towards their right).

The Accountability Charts are normally reviewed and updated every 6 months.

## What If Someone Is Not Being Accountable?

**3 Simple Steps**

1. Go alone to that person and discuss with them your concerns. Explain and listen and try to sort it out.
2. If you do not receive an appropriate response, then take one (or maximum two) other relevant persons with you and talk to them again. The people you take with you should be individuals who are peers or respectable to all parties. The people you take should not be favorable to you more than the other party.
3. If you still do not receive an appropriate response, then bring it formally to the attention of the OPPM, HR, Huddle, or the Director. The management will take the concern and follow appropriate action.

## Responsibility & Authority

With responsibility comes authority. If you don’t agree with a decision or feedback:

* Discuss it with those whom you are directly answerable to
* If you can’t work it out, then move across to the left on the accountability charts (see below)

## Accountability Charts

### Leadership Accountability



[Edit Flowchart](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22prtHgNgQTEPvFCAcTncT%22%7D)

### Business Development Accountability



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22i4smvfYdenxowntH6CrC%22%7D)

### Admin/Office Accountability



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%223V7_AOibSzA874vGqrKu%22%7D)

### Human Resource Accountability



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%222jIvdNhXyBodRJwfkTYc%22%7D)

### Operational Protocols Accountability



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22JSbDyAaJg9ROCMNyRIpM%22%7D)

### Projects Accountability



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22szwAiG7mlf8aojXKs-z9%22%7D)

### Technology Infrastructure & Assets Accountability

The following people mentioned in the chart are the primary accountable person however each person in the network team should be aware of how to manage each item.



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22uWCbrGMDtHx8XT3b1GIB%22%7D)

\* See the [Role Assignments](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.kbo16pnz80dj) doc for more info.

### Quality & Technical Accountability



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22il-krHecbDE3Ze3ieUZT%22%7D)

## Project Document Accountability

The following table shows who is responsible (✔) and who are other contributors (\*) to the project documentation.

| **Document Name** | **Main Purpose** | **PC** | **TP** | **SE/GD/FE/IM** | **QA** | **BD/RM** |
| --- | --- | --- | --- | --- | --- | --- |
| [**Kickoff**](https://docs.google.com/document/d/1T1yXxIT90DzUX-JzQPmnUU0SQYZMkc1fcBxcbl0oMB0/edit) | KT from BD to Operations | ✔ |  |  |  | \* |
| [**Startup**](https://docs.google.com/a/ithands.com/document/d/1FTC3K5WqsnSMH6nbJbjYZBgtwpSm_ILRee4hsQ_ihNU/edit?usp=drive_web) | Build Trust with Clients | ✔ | \* |  |  | \* |
| [**Master**](https://docs.google.com/a/ithands.com/document/d/1XTB6WkLER7Li_mgeqyL3Oe0bhoJToJgdD4DBszH2oJ0/edit?usp=drive_web) | Meeting Agendas | ✔ | \* | \* | \* | \* |
| [**SpecDoc**](https://docs.google.com/document/d/1NZEqAL19shShtNmWG1PlgCpjWAuG0w4_U1axS5Xc3gA/edit) | Technical collaboration | \* | ✔ | \* | \* |  |
| [**Timesheet**](https://docs.google.com/spreadsheets/d/1vgZgN9QyqQJiHkD9Rvt4HelAPDu-U2po4xAdWpU6rNo/edit#gid=1437656923) **or** [**Time App**](https://timesheet.ithands.net/) | Manage Billing expectations | ✔ |  |  |  |  |
| [**Test Plan**](https://docs.google.com/document/d/1neUl94Ls8euXOA0oP3tH5h_vNhQgDqPnIknvHaGQTjU/edit) | Manage QA expectations | \* | \* |  | ✔ |  |
| [**Project Checklist**](https://docs.google.com/spreadsheets/d/1HX9y1Sk1YJA1wpXZFqB1ilb4MCaRrQAaqaLNaofd3Fs/edit?gid=1558734776#gid=1558734776) | Ensure Deliverables quality | ✔ | \* | \* | \* |  |
| [**User Acceptance Testing Sheet**](https://docs.google.com/spreadsheets/d/1FknRI9kW83jtMpiqZ3gdIAbtXGJn_b_7FLEnUwZazKs/edit#gid=14161040) | Keep PO accountable | \* | ✔ | \* | ✔ |  |
| [**Project Review Report**](https://docs.google.com/document/d/1JzfhZHlnJLjhMVv_t2pBlIPxJ82vW3-Yn326SUqe2UU/edit) | Encourage the team | ✔ | \* | \* | \* | \* |
| [**Code Review Doc**](https://docs.google.com/document/d/1ii0dkImKRcVG1qg55gLyEGaPfQu8DQuCLFMx3iS_AEo/edit) | Project Code Review | ✔ | \* | \* |  |  |

✔ = Responsible/Accountable

\* = Contributor

# Project Process

The following are the typical steps and processes for a project.

## Step 1: Proposal

1. We get in touch with prospects by one of the following:
   * Outbound marketing
   * Inbound marketing
   * Events
   * Relational Contacts
   * Referrals from existing Clients
2. The Deal Owner (Engagement Architect, SA, or RM)
   * emails questions and an appropriate Questionnaire (like [WDQ Web Design Questionnaire](https://docs.google.com/document/d/1ubVfCK8F79LFuFyy7tV-8FPkeh46CJvPjcIIsyfPKMQ/edit?tab=t.0#))
   * provides an NDA (Non-Disclosure Agreement) if prospect suggests.
   * puts all requirements and relevant communication into a ReqDoc
3. CRM
   * The Business Development Team uses [HubSpot](https://app.hubspot.com/) CRM for managing our prospects, leads and proposals.
4. SA may take the help from relevant team members in order to understand the requirements and prepare a list of questions on the ReqDoc.
5. The Deal Owner sends questions to Client and gets back answers.
6. The SA creates a proposal based upon the requirements and the Deal Owner schedules a meeting with the prospect to review the proposal. See [Project Estimation Process](https://docs.google.com/a/ithands.com/document/d/16PxihEbxspe6eZco1yGQiNHC4njpKDQ9F49-xImGguw/edit#heading=h.2ce0geya5pvv)
7. If the prospect agrees with budget and the information provided within the proposal, they sign the documents
   * New Clients are given a MSA (Master Services Agreement) to sign
   * The Engagement Architect forwards the signed MSA to the SA and RM.
8. [Finance Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.swpv01j8jesm) sends an invoice for deposit a copy of the invoice should be sent to RM
9. SA creates the DETAIL (aka Team Version) document and shares it with the OPPM team by filling the [New Project Notification (NPN) form](https://docs.google.com/forms/d/e/1FAIpQLSfezUI_wIYydnuqQEiKfClJITkmZYynoZHR6MWuZ4YyOHUSTQ/viewform).
10. HR assigns appropriate resources to the project after getting advice from relevant people and sends out a team composition email. HR should assign the appropriate resources within the next business day. In some cases it may take less or more time.

## Step 2: Kickoff Meeting

The purpose of the Kickoff Meeting is to transfer all the knowledge about the Client and project from the Business Development Team to the Project Team. Staging the project is an extremely crucial phase of the project development life cycle. It is the trigger point towards the project execution phase.

The PC is responsible for creating the Kickoff Meeting Agenda but the BD Team (SA) should be well prepared to introduce the project to the team. The PC will chair the meeting, but the SA should actively participate by giving insight about the Client, identifying risks, etc.

PC schedules a meeting with the following Participants:

* SA
* RM
* [OPPM.HDR@RubicoTech.in](mailto:OPPM.HDR@RubicoTech.in) or [OPPM.DDN@RubicoTech.in](mailto:OPPM.DDN@RubicoTech.in)
* Project Team
  + Tech Point (TP)
  + Software Engineer
  + DM
  + UI/UX
  + Tester
  + Server Admin

After the Kickoff meeting

* The project team should feel well informed about the project requirements and client’s expectations.
* HR creates a project in Club
  + For projects that have the involvement of an AR or a USA team member, PCs should request the creation of a separate project [Client Name - Project Name - AR/USA]
    - e.g.: Virtual Combine Maintenance - AR and Virtual Combine Rebuild - AR.
* Depending on the project, PC and Tech Point may create tasks in Club and assign it to the team
* PC is responsible for the creation of the [Master Project](https://docs.google.com/a/ithands.com/document/d/1XTB6WkLER7Li_mgeqyL3Oe0bhoJToJgdD4DBszH2oJ0/edit#heading=h.lnn39b22xquo) and all the relevant docs that are linked from the Master, etc.

## Step 3: Pre-Startup Meeting

*[The following is copied to the* [*Startup Meeting*](https://docs.google.com/a/ithands.com/document/d/1FTC3K5WqsnSMH6nbJbjYZBgtwpSm_ILRee4hsQ_ihNU/edit#heading=h.k670y4987dxg) *Template also]*

This meeting is between the PC, SA and the RM. The goal is to be prepared for the call so everyone is on the same page.

*Pre-Startup meeting should be conducted xx days after the team composition email is sent, unless otherwise specified.*

**Pre-Startup Meeting Agenda**

* Review the Startup doc and the Master doc (especially the agenda points) making sure all info is relevant to discuss with the Client
* Review the RM and SA role for the Startup Meeting (decide what topics each person will speak about)
  + Typically the RM introduces everyone at the beginning of the call and then the PC takes over from there.
* RM should review with PC the nature of the Client so the PC will be prepared to handle the call appropriately
* PC will send the Startup meeting Doc link email after the Pre-Startup Meeting is completed.

## Step 4: Startup Meeting

*[The following is copied to the* [*Startup Meeting*](https://docs.google.com/a/ithands.com/document/d/1FTC3K5WqsnSMH6nbJbjYZBgtwpSm_ILRee4hsQ_ihNU/edit#heading=h.k670y4987dxg) *Template also]*

The goal of this meeting is to build trust between the client, the PC, and the Rubico team. At the end of this meeting, the client should feel a sense of satisfaction and confidence that he made the right choice with Rubico.

*Startup meeting should be conducted xx days after the team composition email is sent, unless otherwise specified.*

The Project [Startup Meeting](https://docs.google.com/a/ithands.com/document/d/1FTC3K5WqsnSMH6nbJbjYZBgtwpSm_ILRee4hsQ_ihNU/edit#heading=h.k670y4987dxg) is the first meeting between the Client and the Project Team. It is very important that the Relationship Manager should also participate in the meeting and pay special attention to how the Client is responding to the team.

PC schedules a meeting with the following participants:

* Client
* Business Dev Team:
  + RM
  + SA
  + Engagement Architect (optional)
* Project Team
  + Tech Point (TP)
  + Software Engineer
  + DM
  + UI/UX
  + Tester
  + Network Admin

The following are some tips for having an effective Startup Meeting:

* All Startup Meetings should be taken from the office by all team members to prevent poor connectivity, audio, and/or video challenges. [inform the Office Admin/HR if the meeting will go beyond 8:00 PM]
* Wait for everyone to join before starting the meeting.
* Use video at the beginning of the call. This will help build relational capital and trust seeing that we are real people!
* Team should ask good questions and **actively listen** to the Client. Reply to them with affirmation and enthusiasm. Smile when you talk!
* Update the Startup meeting doc during the call taking good notes directly on it. This will show the Client that you are listening to them!
* Observe the communication style and corporate culture of the Client. Evaluate the Client’s willingness to collaborate with Rubico and willingness to share with and learn from Rubico.
  + Does the Client have a “set” way of doing things? Is the Client open to changing/improving their project management?
* Identify potential risks to the relationship.
* Build trust with the Client by being prompt, responsive, etc.

## Step 5: Project Staging

Planning and Staging the project is like laying out the foundation. If the foundation is strong, then the building will definitely be strong. Every Client is concerned about mainly 3 areas - Timeline, Scope and Quality.

PC, Tech Point and relevant team members need to stage the project together!

### The Flow of Staging of a Project

| **Staging Tasks** | **PC** | **TP** | **SA & Engagement Architect** | **QA** | **Team** |
| --- | --- | --- | --- | --- | --- |
| Develop wireframes, and mockups to visualize the solution. | ✔ | \* | \* |  |  |
| Review the mock-up with the SA/BD and present it to the Client. | ✔ | \* | \* | \* | \* |
| Define tech stack and project architecture. | \* | ✔ | \* |  | \* |
| Develop a detailed project plan, including tasks, timelines, dependencies and milestones. | ✔ | \* |  | \* | \* |
| Environment and Version control system Set-up (with Server Team) | \* | ✔ | \* |  | \* |
| Identify potential risks and develop a risk mitigation plan. | ✔ | \* | \* | \* | \* |
| Create a document for local project setup | \* | ✔ |  | \* |  |
| Create a project call schedule (stand-ups and Client call) | ✔ |  |  |  |  |
| Create the first version (not regular updates) of all the project related documents according to the needs of the project (e.g. a Mobile Project might not need hosting credentials) | ✔ |  |  |  |  |
| Develop a test plan covering different aspects of the system and discuss it with the Client. | \* | \* |  | ✔ |  |
| Setting-up the Project Management Tool (PMS) | ✔ |  |  |  |  |

✔ = Responsible/Accountable

\* = Contributor

**NOTE**: The final estimation for development phase after wireframe/discovery is completed, will be shared by SA/Engagement Architect

How will this be Tracked?

1. Project Health Check!
   1. Through OPPM weekly meetings; by reviewing Club, timesheets, & Master Doc
2. Through Audits!
   1. Reviewing Club
      * Reviewing Milestones, completed %, and due dates
      * Using Filters & identifying if any task is without category & Milestone (Note: There should not be any task without category & milestone)
      * Reviewing hours and tasks due date

### How to Stage a Project Using Club?

* **Creating Milestones**: A Milestone is an event that receives special attention (an action or event marking a significant change or stage in development) For example:
  1. Planning
  2. Design
  3. Development
  4. Quality
  5. Launch
  6. Review & support plan
* **Creating Categories**: Organizing the tasks is the most important. Work with the team and break down the major tasks into smaller ones. For example UI/UX Design, Development, Database, QA, etc.
* **Creating Tasks in Club**: Every task should have an ACTION & a DELIVERABLE
  1. Assign each category and Milestone to each task, so it helps to define the percentage completion of Milestone in the Milestone tab.

### What to Consider when Choosing a PM Tool for the Client?

Consider the following:

* If the Client is already using any PM tool, we will join that.
* If the Client is not sharing any PM tool, the PC should suggest 2 or 3 possible systems and let the Client choose which one they want to use with us.
  + Ask/Guide the client to setup their own PM Tool and add Rubico resources to collaborate on it
* This PM tool will not replace the Club in any way. Club will still be used to track all the Tasks and Time.

The following describes the PM tools that Rubico has experience with. PCs should suggest a PM tool that will fit the Product Owner’s temperament:

| **PM Tool** | **Free Version\*** | **Complex Projects** | **Easy UI** | **Bundled Notifications** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| Trello | ✔ |  | ✔ | ✔ |  |
| Asana | x | x | x |  |  |
| Zoho | x | x | x |  |  |
| Basecamp.com |  | x | x |  | * It can track task progress but does not give a single project view. |
| Jira |  | x |  |  |  |
| ActiveCollab.com |  |  |  | x | * Good reports * Good for invoicing management |

### \* Some of these PM Tools have a limited number of users in their free versions

### Staging Site FAQs

*Who hosts the Staging?*

* Rubico hosts staging when we are going to host the LIVE website.
* Rubico strongly recommends the Client to host the staging if the Client is responsible for hosting the LIVE website.
  + In case the Client is not able to manage staging hosting, Rubico will manage the staging environment but should charge accordingly. RM will communicate with the Client about the hosting costs.

*Why do we want to delete the staging (when it is not required)?*

* Hosting the staging server costs money and we want to save money (and network team’s time) when the staging is no longer needed.

*When will the Staging be deleted?*

* It will be removed within 30 days once there is no further work planned for the project.

*What is the process for removing the Staging?*

* For every project where further work on the project has not yet been agreed upon by the customer at the time of a Milestone being completed, the project coordinator will notify the server team upon completion of a Milestone of the project via [Website Hosting Delete Request form](https://docs.google.com/forms/d/e/1FAIpQLSdluZ960OZedUGF1nHb9O2Vb_aAIJe7tVKEMcUQ1kMIB9TFyg/viewform) to start the countdown for removing the staging website.
* If 30 days is selected, the network team will send this email to the PC once the 30 days is up:

| Subject: 30 days is completed; we will delete the staging.  Dear PC,  You requested that we delete http://\_\_\_\_\_\_\_\_\_\_\_\_\_ at this time. We will proceed in deleting this after 2 days unless we hear differently from you.  Regards,  Network team |
| --- |

*How do I get the Staging reinstated?*

* If after removing the staging site further work is requested by the Client, a new staging site will need to be created from the production site. This work will be billable to the customer.
* If the PC receives more work from the Client and needs the staging reinstated, then the PC should fill the [Hosting form](https://docs.google.com/forms/d/1h1FywiVM9JJ6hb1Hv3mt3bYqxF8yIXEAMRNb8ALDJME/viewform?uiv=1&edit_requested=true).

## Step 6: Pre-Development

PC ensures that everyone on the team agrees to a certain path before coding begins. The path includes:

* Finalize Tools and Technologies
  + Is the project a difficult one? If so, the PC gives adequate time to everyone to brainstorm different ideas to make the project successful. (Example: Client is assuming the solution should be built in WP, but after seeing the initial requirements WP may not be the best solution).
* Finalize PM Tool (Google doc or other)
* Clarification of team questions (regarding requirements, documents specifications etc...)
* Any concerns on timeline

PC requests Git and Hosting as needed for the project

* Fill the [Hosting/Git Account Request](https://docs.google.com/a/ithands.com/forms/d/e/1FAIpQLSd1rPYO_IHT34Tygyw0-AOiVenmWzxgDxZ4viWIeQL3O30vAg/viewform) form.

PC should create a Code Review Document

* Create a copy of the team version [template](https://docs.google.com/document/d/1ii0dkImKRcVG1qg55gLyEGaPfQu8DQuCLFMx3iS_AEo/edit) for the specific project.
* The PC and TP will decide how many times the code review should be done in a project as per the timeline and size of the project
* The [Code Review Process](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.bi34sip2x4e6) is a practice that we include in the development life cycle.

RM ensures that the Deposit is collected from Client

* Preferably before the development begins, if there is any challenge collecting the deposit, the RM can assess whether to give Client a period of grace to pay or to stop the development until the deposit is collected.

### Project Retrospective Meetings

In the process of development we can be carried away by the work in front of us and lose track of where we are going and the purpose that our Clients have for their software solution. At Rubico we want to promote a healthy software development that welcomes a retrospective evaluation of the progress or the end product.

The process for the retrospective meetings will be as follows:

1. During the pre-development of the project, the PC creates a timeline/Sprint/Due Dates for the project that includes dates for retrospective meetings for which the participants should include Client, RM and PC.
2. The meeting should be chaired by the RM, who can use the [Project Feedback Form](https://forms.gle/Tavu9E1uKZqZNNZd9) as reference to ask the questions to the Client and may fill out the form on behalf of the Client.
3. The [Project Feedback Form](https://forms.gle/Tavu9E1uKZqZNNZd9) can also be shared with the Client prior to the meeting and if the data has been submitted by the Client already, the RM should consider addressing only matters that were not cleared from the details the Client filled out.
4. The Survey should be shared with the Client according to the PC’s timeline. It is recommended for the PC to request the Client to fill up the survey at the end of one of the scheduled calls with the team. This will help us collect more inputs from the Clients. If the Client is unwilling to do it while on the call, you may share the link to the [Project Feedback Form](https://docs.google.com/forms/d/e/1FAIpQLSe-8bUD0uHJqa6LmK6Yo1_lB4oDWB6Yb9iZHe82N_mhNwrSzA/viewform) through Zoom Chat and/or the Master Doc.

Retrospective meetings can be planned based on below project criteria:

1. For large complex projects with a probable timeline and where the planned sprints are already in progress, these meetings can be scheduled after reaching a Milestone delivery.
2. For ongoing projects without an end insight (maintenance, task based projects) these meetings can be scheduled periodically every 2 to 3 months.
3. For Projects with a defined deadline or short (1-12 weeks), these meetings can be scheduled at the end of the project as it should follow the principle of giving enough time for the Client to assess the relationship and the work.
4. For Sprint based projects, the retrospective meeting should be scheduled after every EVEN NUMBER SPRINT (e.g. Sprint #2, Sprint #4, etc.).

Add the retrospective scheduled meetings in the Timeline/Sprint Plan or create a schedule for the meetings and add it to the timeline column of OPPM.

## Step 7: Development

After the initial requirements are understood and clear to the team, the development begins. Development can include Graphic/UI design, SEO, and actual coding. It is important that the PC takes an approval on project Spec Doc from the Client before development starts.

**Daily Standup Meeting**

Daily Standup Meeting is an internal 15 minute meeting where no one is allowed to sit on a chair! The Client is normally not invited to the meeting.

**3 Questions that each Team member answers:**

1. What did I accomplish since the last Standup meeting?
2. What do I plan to do by the next Standup meeting?
3. What challenges am I facing?

The Standup meeting is not a problem-solving meeting. When a major challenge is reported that needs discussion, a separate meeting should be scheduled. It is possible to convert a morning Standup meeting into a problem-solving meeting, with prior notification to the team.

## Step 8: Testing

Here are the steps recommended to be followed by the team for Testing process:

1. After completing the development and unit testing on the development environment, the Development Team should update the staging environment.
2. The staging environment then needs to be tested or reviewed at least once by the Development Team before updating the QA team.
3. Once the Development Team confirms that the staging environment is ready for review and internal testing, QA should start the testing process making sure that the issues or feedback are documented fully on the gitea or any bug reporting platform for that case.
4. It is advisable to add proper screenshots or gif supporting the issue reported so that it is easier for the Development Team to reproduce and fix quality issues quickly.
5. Once all the feedback or issues are reported, QA should update the Development Team to start fixing the issue.
6. The Development Team is advised not to fix any issues during the testing phase.
7. Once the issues are resolved and marked as resolved on the gitea. The Development Team will ask the QA to do a regression testing.
8. The QA team will then do the regression testing and confirm that no pending issues are there.
9. PC will then ask the Development Team to schedule a demo meeting with the whole team so that the whole team can review the product and provide feedback.
10. This meeting should take place at least one day prior to the Client’s meeting. So that the Development Team can work on the fixes in case any are reported during the demo.
11. PC then makes the final call to either reschedule the Client meeting in case there are major issues or attend the scheduled meeting and deliver the final staging product to the Client.
12. Once delivered the testing process will be marked as completed and the team can wait for the UAT to finish before working on the feedback in case reported by the Client.

**NOTE**: [Device Management](#_qs5hxxwz1m9c)

## Step 9: UAT & Release

Whenever the QA team finalizes their testing and all the Club tasks and tickets from Gitea/BugHerd are closed (which are required for this release) then the PC should arrange the Staging UAT/sheet with the Client.

After the UAT, the PC should work with the release person and update the files into the production environment. A release person can be a Tech Point or PC or a third person out of the team.

Once release has been verified by the QA team on the Live environment, the PC should arrange Live UAT with the Client.

During the Live Environment launch, the PC should assemble all the team, the PC should invite all the members who he/she believes are critical for this step.

### UAT FAQs

**What is UAT?**

User Acceptance Testing (UAT) is an exercise performed by the Product Owner to verify and accept the project before moving it to the production environment and after moving to production.

**Why do we do UAT?**

Developers code software based on their "own" understanding of the requirements and may not actually be what the Product Owner expects from the software. Also, requirements change during the course of a project and may have been missed by team members.

**How long should UAT take?**

The PO should start UAT immediately after being informed by the PC. For reference, consider this: For small projects ~200-500 hrs, the UAT may take a day. For larger projects ~500+ hrs, it may take more days. But it also depends on the requirement provided by the Client.

**When should UAT be done?**

It is done twice. UAT is done as the last step before moving to production and the first step after going into production.

**What are the steps involved in UAT?**

PC along with the QA engineer and Tech Point decide on the appropriate UAT process. The typical process is:

* The QA Engineer defines the appropriate test scenarios and documents them on the UAT sheet (or equivalent).
* PC notifies PO to do UAT on the staging.
* PC notifies the PO about the updated tally of the Hours up to the beginning of UAT.
* After PO completes the staging UAT the product is moved to production.
* The PO completes the production UAT immediately.

**Which tools should be used in UAT?**

The following are the common tools used:

* [UAT sheet](https://docs.google.com/spreadsheets/d/1FknRI9kW83jtMpiqZ3gdIAbtXGJn_b_7FLEnUwZazKs/edit#gid=14161040)
* BugHerd
* Gitea
* PM Tool

**When to use a Release Note?**

When a Client requires a release note document, the team can use [this template](https://docs.google.com/document/d/1sURzqKLhb6R3skFiQKLFgTEp9qN2XCN2EblWjIZ23pM/edit#heading=h.7nizfkzxnaj). This information may be found also in the SpecDoc, PM Tool , MasterDoc and/or Test Plan.

**NOTE**: The release note should be prepared in collaboration between the PC, Tech Point and QA.

PC schedules a meeting with the team to review and execute the release

* PC
* Tech Point
* QA

**The best time to Go ‘live’!**

In order to prevent inconvenience to everyone, any major release of an application (web app, eStore, mobile app, etc.) should not be done on a Friday or a day before the office is closed. *Normally the best time to release is on Monday morning India time* (Sunday night USA time). This gives the team most of the day to test the application on the live server before the Client and users review the system. If you are not able to do it on Monday, no need to delay it for another week, it is recommended you can also go live on Tuesday or Wednesday...

**What should I consider for a Go-Live event?**

At the time of a scheduled Go-Live event for any website, the relevant team members needs to be present in the office and if in case a person, including network/server, developer, QA, etc. has a planned leave, an additional person (most likely the Tech point/Developer/network/server) should be made responsible to take on the responsibilities of the person on leave.

**Who is responsible for creating the Go-Live event?**

The PC is responsible for creating the Go-Live meeting on the calendar and inviting the network/server person as well as the other relevant members.

**When should the PC Schedule the Go-Live event?**

It should be created a minimum of 24 hours in advance. 48 hours is ideal as this will allow members to also join the last stand up meeting a day before the Go-live.

**What is the role of the Network/Server Team member in the Go-Live event?**

The Network person is responsible to add more project specific points to the network checklist (e.g. hosting, DNS and third party credentials can be added as a checkpoint) before the Go-Live event and should be referred to at the time of Go-Live event.

**Who will make the project live?**

Web-based projects

* + - Only one member of the Server team, with the help of the developers. If a network/server team member is not available in your office location, the PC should involve someone from the other office, providing them with the critical information and details for the Go-Live event.

Mobile based projects

* + - The Tech Point who is responsible for preparing the builds for both the platforms i.e Android and iOS should make sure that they have the [publishing document](https://docs.google.com/document/d/1ZNjG2AFcmb5G1jQPjPnODGPHVAWsB9F8Hewg0l067t8/edit#) ready to push the builds to store.
    - App publishing documents should be followed while adding the details to the respective stores.
    - Tech Point should always check the environment before pushing the builds to live.

## Step 10: Milestone Achieved

This step generally starts when Rubico provides the Client the UAT Sheet (see [Project User Acceptance Testing UAT Sheet](https://docs.google.com/spreadsheets/d/1FknRI9kW83jtMpiqZ3gdIAbtXGJn_b_7FLEnUwZazKs/edit#gid=14161040)) for the “live or last” scenario. Rubico typically provides 5 days but can be agreed to be more if the project is quite large and has been running for a long time. The Client is expected to provide Rubico feedback if they have any during this period of 5 days.

**Milestones for Mobile Apps (iOS, Android):**

The Milestone is considered achieved following completion of the UAT (User Acceptance Testing) and/or the app is published to the App Store/Play Store. If the App is rejected for any reason and needs some changes these will be billed per hour.

**Milestone Achieved Email:**

**When Rubico is hosting the site**, include (CC) - [billing@RubicoTech.com](mailto:billing@RubicoTech.com), SA in the Milestone Achieved email (see [Kickoff](https://docs.google.com/document/d/1T1yXxIT90DzUX-JzQPmnUU0SQYZMkc1fcBxcbl0oMB0/edit#heading=h.bidpejfa9w7g) for email sample)**.**

### Milestone Achieved FAQs

**What is the purpose of the Milestone?**

The purpose of a milestone is to serve as a significant point or event in a project's timeline that marks progress, achievement, or completion of key deliverables.

**Does a Milestone apply to all Projects?**

Milestones are often used to mark significant points or achievements within a project, such as the completion of a major feature, a successful integration, or the delivery of a prototype. They help in tracking progress, aligning team efforts, and managing deadlines.

However, not all projects may use milestones. For instance, in very small or simple projects, or in projects using agile methodologies where work is iterative and continuous, milestones might be less formal or even unnecessary.

Some examples of Project Milestone can be:

* Requirements Completed
* Designs Approved
* Completion of an MVP
* Project Closure

**If the Client is making the site live, when does the Milestone apply?**

* When there is no backlog of work and we want to release team members to other projects
* When the current Phase for the project is completed and the Client agrees to the backlog of work is for an additional Phase
* When the site is not live after five business days and Rubico has communicated with the Client about the lack of backlog work, once they acknowledge the lack, the team will then be released

**Is the Milestone Achieved when the Client stops communicating during the UAT?**

No, but the PC can send an email to notify the Client that the project will be put on hold and the team will be assigned to other projects until Rubico receives a written confirmation from the Client to restart with the project.

## Step 11: Billing

* The PC will make sure that all work has been completed, is well tested and the client is reasonably satisfied.
* PC is responsible to properly account for all billable hours. See [Exporting Billing](#_th3612elsbs).
* Server related billing
  + Domain name and SSL (billed annually)
  + Google Workspace Email hosting (billed annually from the date it was created)
  + Web hosting (usually billed in 6 month increments)
* For all emails sent to a PC related to invoices, a [Google Workspace Content Compliance Rule](https://docs.google.com/document/d/1vt36HoR5xvXlB_ip-8k_nBgBA7wCWDH3Jt_2yV-9JWk/edit?tab=t.0#heading=h.vyda75v2l4q3) is in place, this will reroute this type of emails looping in the RM, and Billing team. If a client refers to such email being sent to a PC or the team, the PC should direct the client to communicate with the RM who has the visibility and can further assist the client.

## Step 12: Sharing the Code/Spec Doc

**For projects where Rubico is Hosting:**

The PC should always confirm with the RM that the invoices are up-to-date before sharing the code. Code can only be shared with the Client if invoices are paid.

* **Special Cases** 
  1. **Client/Team with Technical Skills:**
* Ask the Client to create a repository
  + Share access with Rubico Team
  + Share the code in their repository
* Include Client in our Repository
  + Client’s access should be limited to the specific project repository.
  1. **Client does not have/need version control**
* Share through Google Drive
* Share through a password protected Zip file

**For projects where Client is Hosting:**

RM should try to get these Clients into a prepaid committed agreement, and PCs can confirm with RM if this is a prepaid Client.

**When Client is a committed Client**

When requested by the Client, the team may share the code using the above special cases considerations.

**SpecDoc**

1. Maintenance/task based projects also need to be made a [SpecDoc](https://docs.google.com/document/d/1NZEqAL19shShtNmWG1PlgCpjWAuG0w4_U1axS5Xc3gA/edit?usp=sharing). It should include a high level description for an already built system and detailed description for all new features (PC and Tech Point can further decide what should be included)
   1. If it is functionality changes - the project needs a SpecDoc from Rubico
   2. If it is content changes - the project does not need a SpecDoc
2. Tech Point is responsible to maintain this document updated
3. This document should be updated every time there is a change in the code

## Step 13: Project Review Report Meeting

**Project Review Report Purpose**

The [Project Review Report](https://docs.google.com/document/d/1JzfhZHlnJLjhMVv_t2pBlIPxJ82vW3-Yn326SUqe2UU/edit) is the final document produced for the project or when a particular Phase or Milestone has been reached. It is a worksheet used by the team to assess the success of the project, identify best practices for future projects, resolve all open issues, and formally close the project’s milestone.

The Project Coordinator should create this document at the beginning of the project and share it with all the team members and review the project with the team once it is completed. To do this PC schedules a meeting with all the participants as listed on the [Project Review Report](https://docs.google.com/document/d/1JzfhZHlnJLjhMVv_t2pBlIPxJ82vW3-Yn326SUqe2UU/edit) document to review the project once it is completed.

**Project PRE-Review Report**

* Clean up Final Tasks
  + Confirm outstanding issues, risks, and recommendations
  + Outline tasks and activities required to close the project

**Project Review Report**

This Project Review Report is created to accomplish the following goals:

* Celebrate & Encouragement (assuming the project was successful!)
  + Encourage the team in the areas where the project was successful (Quality, Budget, Timeline)
  + This meeting should be a time for people to express themselves about how they feel about the project and what they learned
* Continual Improvement
  + Review and validate the success of the project
  + Identify project highlights and best practices for future projects

After the Review Report meeting is completed then it will be moved to the “Completed Projects” tab on the OPPM.PCs should review with OPPM and update Club at the same time as it moves from the HDR/DDN tab to the Completed tab in OPPM.

**Timing of the Meeting**

Project Reviews are meant to be "special" and encouraging times for the team therefore the meeting times should be during regular office hours. The meeting should be kept as short as possible (30 minutes or less) at the end of project completion and for ongoing/maintenance projects at least once a year. There is no need to review every single item on the doc as everyone should have reviewed it before the meeting. Discussion should revolve around people stating what they learned etc….

**Token of Appreciation**

Chocolates may be given at the beginning of the meeting if the project was deemed successful. PC should ensure that this is available and distributed appropriately.

[OPTIONAL] If a RM cannot attend the Review Report meeting during India office hours then

* The PC can record the meeting or have a separate meeting with the RM before and the PC can deliver your thoughts to the team.
* The RM can also be encouraged to record themselves on video and the team can watch it during the meeting.

## Step 14: Support and Maintenance

Considering the nature of the Client and their project, the PC should communicate with RM if a **Maintenance and Support Proposal** should be given.

A Client may just need a few updates and will only require Rubico to be engaged with occasional changes/fixes, this is considered an “inactive” client and the team should support the Client according to the [SLA](https://docs.google.com/document/d/1ODvn3X_3FS8v7uhswk2hOnZY-BzVGvgK1Y1MXR2a1_o/edit#heading=h.al2k7q4jti2j).

If the Client will require consistent support to work, the PC should collaborate with the RM to define a FTE proposal that best suits the Client needs. This could be considered when Client has a need and budget to support at minimum of 20 hrs/month of engagement.

To help you in making a decision to propose a maintenance engagement use the [Application Support Questionnaire Template](https://docs.google.com/document/d/1wen1BaoFjR0dOA2Fz3lqR30K0hxRwEArXkqWDF_H_9I/edit) (ASQ) for collaborating effectively with the Client.

# OPPM Sheet

# 

Everyone has edit rights on the [OPPM](https://docs.google.com/spreadsheets/d/1kBb5EbvCSWjRLcDLu3R0-oOgxbowTaEEg0BBijEIteI/edit#gid=1368702071) sheet for their respective column. This is to bring more transparency and clarity in the hours being updated in OPPM for team members. Everyone will be able to update their actual time they are engaged in projects helping everyone in the organization in the following ways:

* Clarity
* Planning & prioritization of work schedule
* Transparency
* Forecasting
* Workload
* Resource Engagement/Allocation

A 0 (zero) in a cell indicates the person is assigned to the project but does not have work to do on the project currently.

**What hours do you put on the OPPM?**

* For *active* projects listed on OPPM, put the hours you are working *today*.
* For *past* projects (where the Client has given more tasks), put your hours in the row “OTHERS” with a note stating the Project name.
* For *future* projects (that BD team is working on and has asked for help in researching or estimating), put your hours in the row “OTHERS” with a note stating the Project name (or Prospect name).

**When should you add your learning hours in the OPPM?**

* If you are learning for a specific active project/task, you should add your learning time in the same row/cell in OPPM.
* If you are learning for a project that is not listed on the OPPM, put your hours in the row “OTHERS” with a note stating the Project name (or Prospect name).
* Do not put any hours
  + where you are learning new technology but there is no project/Client associated with it
  + you are spending doing management, HR, or other non-project related

NOTE:

* Everyone is expected to update their time on the OPPM sheet on a daily basis before 11:30 AM.
* Blank cells indicate that a person is not assigned to the project. **Do NOT delete a 0 from a cell.**

## New Project on OPPM

The Project Coordinator (PC) can complete the [NPN (New Project Notification form)](https://docs.google.com/a/ithands.com/forms/d/e/1FAIpQLSfezUI_wIYydnuqQEiKfClJITkmZYynoZHR6MWuZ4YyOHUSTQ/viewform) when an old Client gives a new project. A new row will then be created on the OPPM sheet.

If it is a small project and is expected to be completed in less than a week then the team can work on it and put their hours on the last row (OTHERS) of the OPPM sheet.

### How to Determine if it is an old client?

If a PC, OPPM or [Solutions@Rubicotech.com](mailto:Solutions@Rubicotech.com) group member receives an email from an old client, you should look in the following datasets to determine who is the right person to assign to serve the client:

* Look for the client’s name in the club or the OPPM sheet to assess who was the last PC or last group of people who were serving the client.
* If the PC is no longer a Rubico empoyee, look at the Knowledge Transfer document and if needed follow the trail through other KT documents until you find the new PC to be assign.
* If there is no evidence of KT to a PC, confirm with RM and OPPM before you assign a new PC.
* If the email reached the PC or OPPM the process of assigning a PC should be done as soon as possible keeping in mind the [SLA](https://docs.google.com/document/d/1ODvn3X_3FS8v7uhswk2hOnZY-BzVGvgK1Y1MXR2a1_o/edit?tab=t.0#heading=h.6smo6cw18na2) reply time. If the email reached [Solutions@Rubicotech.com](mailto:Solutions@Rubicotech.com), the responsible person for old client should also respond according to the SLA.

## OPPM Support Form

The OPPM Support form [HDR](https://docs.google.com/forms/d/e/1FAIpQLSe0vcEHiq_ylWnfDQo7nDQA2mP4kW95Cpavjlp74D_Acc3cFg/viewform), [DDN](https://docs.google.com/forms/d/1lLl9J8ThiML726uJrPJMXAbubNhcvvmQg8jSLGOgc1E/edit) has been created for the purpose of reaching out to the OPPM for help in Resourcing (>8 hours), Competency, Budget, Timeline and keeping a log of these requests related activities for the OPPM in the [response form](https://docs.google.com/spreadsheets/d/1N0hgCBcxU5VPFmag1T8-7rXvdMiBUK5fCzN5wrWY_hc/edit?resourcekey#gid=242164243).

## OPPM Auditing

Audits will take place weekly, preferably the day after the OPPM meeting. If the auditor encounters a problem he/she will mark the corresponding cell in the OPPM sheet yellow and then comment on the specific issue details (either on the OPPM sheet itself or the relevant doc/sheet).

**OPPM sheet**

* Does the URL section have links updated for each column/document?

**Master Doc**

* Are meetings happening correctly?
* Do the meeting notes include agenda points for the following (when relevant):
  1. Review Timeline [optional]
  2. Review Timesheet
  3. Review Burn Rate, does it match what is stated on OPPM?
* Are meetings’ To-Do boxes checked off indicating they are completed?

**Timeline**

* Has the timeline been updated in the last 6 days?
* Is the status mentioned correct as per PC

**Timesheet**

* Has the timesheet been updated in the last 6 days?
  1. If not, then
     + Leave a comment to update the timesheet.
* Does the Timesheet link have a Client’s unique URL?
  1. If not, leave a comment for the PC to update the link

**SpecDoc**

* Have the technologies been clearly defined which are used/going to be used in the project?
* Does it include a workflow diagram?
* Does it include the Database fields, UI Control Names and validation messages for the forms?
* Does it seem to be updated regularly?

**Gitea and Code Audit steps**

* OPPM Sheet has URLs to all git repo [PC]
* Auditor has access to all repos [Network (PC)]
* Every project should include a proper readme.md file which tells about the dependencies for the project and setup instructions. [TP]
* Repo has minimum 3 branches as per [Purple Book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.4ygwjmgrfpf3) (In some cases there is only two environments i.e. Dev and Staging). [TP]
* Team is pushing code to repo frequently (for Active Clients). [TP]
* Team is following commit message convention as per The [Purple Book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.4ygwjmgrfpf3) [TP]
* Team is using Pull Request flow defined in The [Purple Book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.4ygwjmgrfpf3) [TP]
* Check if the code is merged through Pull request. Staging and Master branches should have protected icons (No team members can directly merge code into staging and master). [TP (Network)]
* Check there should not be any pending pull requests to review since 2 months [TP]

**Club**

* 1. Milestones should be created with proper due dates.
  2. Task should have the following
     + Task status should be updated.
     + All tasks should have assignee and Task type (Log or Task billable).
  3. The Notes section has to be used for information (login credentials) sharing instead of creating the tasks.

**Checklist**

1. If it is a new project make sure a checklist has been created for the project.
2. In the Overview tab, the responsible person's name should be updated.
3. Check whether the Domain labels in the overview section and the Text in the tabs of the sheet should be the same.
   1. Check that Domain labels should have a correct link for each tab.
   2. In the Overview tab check that separate columns are maintained for Milestone/Phase, Staging, and Live.
   3. Check if the test cases/tasks are added/updated by all the responsible persons assigned for the domains in the checklist.
   4. Proper Remarks should be given by the responsible person if the test case is failed or N/A.
   5. The checklist should be completed before the Project's Due Date.
   6. If the project is in the maintenance phase then a note should be added for that in the checklist cell of that project.

**Escalation process**

* When the Audit team member finds a problem and highlights the cell in Yellow.
  + The auditor leaves a comment mentioning the problem found and provides in the comment reasonable time to fix the problem.
* If the problem is not resolved after the reasonable time mentioned in the comment.
  + The auditor may leave a second comment and give a reasonable time for the problem to be solved.
* If the problem is not resolved after a second chance
  + the auditor should highlight the cell in Red
  + leave a third comment providing reasonable time to fix the problem.
* Highlighting the cell in Red is the way for the auditor to escalate the matter to OPPM
  + OPPM will then review the cells in Red
  + Leave a comment for the problem to be fixed within a reasonable time.
* If the problem is not resolved after the OPPM comment
  + OPPM should escalate this matter to HR via email to the responsible HR person and cc the resource at fault, stating the situation and the time that it has taken for the problem to be resolved.
* HR should then follow their process for matters like this.

**Comments Resolution**

* If the resource has resolved the problem, they should leave a comment under the Audit team’s comment, only the Audit Team resolve the comment.
* Comments and highlights can only be resolved by the Audit team and OPPM once the matters have been sorted.

The Auditors include an OPPM representative and are named on the OPPM sheet. Any areas that need improvement are noted via comments on the OPPM sheet directly. The people assigned as Auditor will be changed periodically to give an opportunity for others to learn and be part of the improvement process.

NOTE: The Auditors are part of the [email group](https://docs.google.com/spreadsheets/d/1hojphaeNiqEThhPTyCRnLkj7wxG8XocIENVbj0Vr62c/edit#gid=0) called [shared@RubicoTech.in](mailto:shared@RubicoTech.in)

## Best Practices of Sharing Resources

To ensure the right balance between project complexity and team experience, resource allocation is divided based on the employee’s expertise.

When staging a project, it's important to consider the complexity of the task. For resources with less than two years of experience, allocating a resource to a single project with at least 4 hours of daily involvement can help them develop deep expertise and prevent them from feeling overwhelmed by multiple responsibilities.

For resources with 2 to 4 years of experience, project coordinators are encouraged to use discretion based on the individual’s technical skills and efficiency growth. While it may be beneficial to keep them focused on a single project, flexibility should be allowed if the resource is ready to take on additional responsibilities or if other projects require their support for further development.

# Club

Club is our Project Management Tool/Software. We use Club for the following purposes:

* Collaboration with team related to projects (Internal communication)
* To assign tasks (work) to specific team members
* Project Assignments (defines who is responsible for the project/task and role they play)
* Billable Hours Tracking so we can bill right hours to our Clients
* To generate Weekly Reports for company and team

## Life Cycle of a Task in Club



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22skyrmliYgXtAKHxKYl2j%22%7D)

**Team** can change the labels to:

1. PROGRESS: Assignee acknowledges it and starts working on it
2. COMPLETE: 100% completed by team and ready for Client to review
3. ON HOLD: Team is on hold and waiting on some information

**PC** can change the labels to:

1. ASSIGNED: Assign task
2. ON HOLD: No one is expected to work on it
3. Check tasks with COMPLETE label & Change the status to COMPLETE once it’s accepted by Client
4. If the task is not done or if there is any feedback from Client, change the label back to ASSIGNED & status back to RE-OPEN

## Keep Club Comments Concise

Get to the Point. Only type facts in comments. Please do not type any unnecessary words into Club because it takes more time to read it.

Be concise. Do NOT put words/comments like:

* Sir (we all respect one another and therefore putting “Sir” or “Mam” is not necessary)
* Thanks (Tell the person face to face “Thanks”)
* Your name (your name is already shown in the task)
* Emotional Comments (don’t say “I’m very upset”, If you need to share an emotional comment, do that in person face to face and NOT in written form when possible. Typed comments can easily be misunderstood)

### Email Notifications

Many people in the office receive dozens of emails daily. It is difficult to read every email received in a day. We do not want to receive emails unless it requires special attention or an action is required.

**Notification from Club**

Whenever we create any project or task in Club it sends the Notifications to the assignees.

**Emailing Comments**

While posting a comment on Club, only check the team members names when you really want to send them an email notification to know the info and deselect the other ones so that the rest of them will not get distracted. You can do this by using the ”Email Subscribers” option in the Task’s comment window.

**Up-to-date Info**

It is very important that Club is kept up-to-date.

The only tasks that are acceptable to be past due are tasks that are waiting for a Client reply. All other tasks should always have proper due dates and be managed properly and kept up-to-date.

### Due Dates

If you cannot make a due date then follow this procedure:

Notify the Project Coordinator immediately (not right before it is due) by putting in the Club Comment:

*“Please change the due date to [another date]”*

The Task Owner (usually the PC) will do one of the following

* Change the due date to your requested date or another future date
* Tell you that it is not possible to change the date and you are required to stay late or work on Saturday.
* If the Task Owner does not respond, then please Google Chat /email/or call his/her mobile if the task is not LOW priority
* If the task is LOW priority and the Task Owner does not respond to your requested due date then you can assume that your requested due date is ok. Your requested due date is now the functional due date.

### NERF (New Employee Request Form)

If we have a lot of work or get a new project and do not have any human resources to work on then please complete the [NERF (New Employee Request Form)](https://spreadsheets0.google.com/a/ithands.com/viewform?formkey=dHViRVJpZVo4bjF1YlE4RlB2aS1iY1E6MQ#gid=0). Talk to Kundan if you have any questions about recruiting.

### Managing Hours in Club

### Definitions

**Billable Hours**

Time logged into Club that the employee and the PC believed added direct value to a project (which is either a Client or Rubico project).

**Non-billable Hours**

Time logged into Club that either the employee or the PC does not believe has added direct value to a project.

Billable Hours



**How do I know if my time should be billable or not?**

Only put the time into Club that you would be willing to pay for if you were the Client (follow the Golden Rule!)

**Why should you Log your billable time in Club?**

It does take extra effort to log your time, but it is worth it! Here are some of the reasons why it is good for you (and Rubico):

* If a person does not log their billable hours daily, then the hours may be forgotten and will not get billed to the Client.
* Time logged shows up on reports which are reviewed regularly, including at Evaluation time and it is also one of the points for the management to review your work.

### Proper Log Description

It is very important to add a valid log description in Club. Your log description will help others to understand and verify your hours. It will be helpful for all of us in case we have to go back and see what we have done in a particular task. Log description will provide clarity and transparency of your work.

A good log template

* Define what you did
* Define the outcome of your work

A good log template for meeting

* Define why you required that meeting or purpose of the meeting
* With whom (attendees)
* Outcome of the meeting

The following will help you understand Rubico’s expectations when creating a log in Club:

| **Not acceptable Club Log** | **Reasons why it is not acceptable** | **Proper Log** |
| --- | --- | --- |
| Project name - 1.00 - Worked on login form | What exactly has been completed in this task, What has been achieved while working on this form. | Created a login form controller and designed the view as per the designs. Added validations as per the SpecDoc. |
| WFH - 6.00 - Learning/Training - 'Virtual-Combine: Review code' | Which specific code in the project did you review? What was the outcome of this time spent reviewing code? | Virtual-Combine - 6.00 - QA - Code review of <module> written by <name> - Found two issues, Added issues in Git issue tracker for these. |

### Working From Home (WFH)

If you are authorized by OPPM to Work from Home (WFH), you are required as described below to log in Club all of your time working.

**Where do I log my time?**

* If you are working on a **Project** for a Client and adding direct value to the Client then log your time into Club. Please uncheck the billable box if you think the hours should not be billable to the Client.
* If you spent time working/learning/mentoring/interviewing/helping others but not directly on a Project then log your time on the **WFH Project** in Club and **uncheck** the billable box.

**How does WFH affect the hours logged into Club?**

|  | Working from Office | Working from Home (WFH) |
| --- | --- | --- |
| Do I log my **billable** hours into Club? | Yes | Yes |
| Do I log my **non-billable** hours into Club? | Optional  (use WFO Project) | Yes  (use WFH Project) |

It is important for all the Rubico employees to log their billable time into Club every day. If one is not able to log his/her billable time in Club on the same day, then he/she has to log the hours the next day before 11:30 am when the Daily report is generated.

**Increased accountability when WFH**

When working from home, it is expected from all team members to provide transparency on how they are spending their working hours. The Daily Report shows all the hours logged in Club on projects or WFH. If an employee misses to update the Club log by 11:30 am the report will not have the information about the last day's work. In this case the Employee should immediately:

* Log their time
* Send an email to the [Office Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.swpv01j8jesm) to help them understand the situation

An employee should only log the time that they actually worked. SLs or Leaves should be availed in case less than 8 hours was worked.

If an employee does not meet these expectations, then their WFH privilege will be canceled.

**WFH Club logs must be detailed**

If the person working from home does not give proper description to a WFH task then it will not be considered and this time will be counted as a leave. It is important to give very specific details and to log it before the daily report is generated. The following table describes logs that would not be acceptable:

| **Not acceptable Club Log** | **Reasons why it is not acceptable** |
| --- | --- |
| WFH - **1.00** - Learning/Training - 'Learning vue js.' | What are the actual resources (websites, tutorials, etc) you used in your learning? What precisely did you learn? |
| WFH - **6.00** - Learning/Training - 'Virtual-Combine: Review code' | Which specific code in the project did you review? What was the outcome of this time spent reviewing code? |
| WFH - **0.50** - Learning/Training - 'typing practice ', | What were the results of your typing practice (your current typing speed)? What typing practice program/website did you use? |
| WFH - **2.00** - Internal Meetings - 'THEO internal meeting', | What were the main agenda points covered in this 2 hour long meeting? What challenges were discussed? Who else was in the meeting? |
| WFH - **0.50** - Internal Meetings - 'Discussion with Ankit regarding the project.' | Which project? Which Ankit? What were the main agenda points? Should this have been accounted for in a project, not WFH? |
| WFH - **1.00** - Mentoring - 'Mentoring Ankit | What topic/agenda point did you discuss with Ankit? |
| WFH - **1.00** - Mentoring - '-catch up with the mentee', | Which mentee? What agenda points and topics did you discuss? |
| WFH - **3.00** - Others - 'Code analysis and bug fixes.' | Which specific code files did you analyze? Which bugs did you fix? What Project? |

### Introductory Period

**Introductory Period** (Usually first 6 months) new or rehired people need to record the daily learning, work etc related activities into Club (Rubico Project Management Tool).

Adding the daily activities into Club helps the organization understand the employee’s engagement related to the learning of new skills, and assignment of work. During the intro period the new employee is developing the habit of recording the activities into the PM Tool so we can bill the Client fairly.

### FAQs

**Which activities should be logged?**

Working on live projects, Internal projects, research work, Learning new skills, Project meeting, meetings with mentor, HR and others, or working on any task assigned by Rubico etc. should be logged into Club.

**What Does the log description look like?**

Review the “[Proper Log Description](#_oawfd4jurcmt)” section of Orange Book.

**What if I miss adding the log?**

You should develop a habit of logging the time everyday so it becomes part of your work routine. Still if you miss it please log it as soon as possible.

**I worked with the live project and missed logging my hours into Club. What to do as the next steps?**

Whenever you get to know that you missed to log the time please log it and let the concerned person (PC) know about it so PC can bill it to the Client whenever is the right time.

**What if I don’t have anything to do?**

If you don’t have anything to do please talk to your mentor/PC → your team →oppm and still if you don’t have anything to do, talk to HR.

**Should I target to complete my 8 hour log everyday?**

No, You should not target to complete the 8 hours log. Target to log the time you spent working in the office. No worries if it is less or more hours.

### Working From Office (WFO)

If you are in the office and want to log your non-billable time into Club then use the WFO Project. Please make sure to uncheck the Billable checkbox as it does not going into the billing.

### Deciding which Hours in Club get Invoiced to a Client

It is the responsibility of the PC (take help from RM when needed) to review logged time in Club and decide what is invoiced and what is not.



**How do you know what is invoiced hours and what is not?**

There are two types of projects:

* Fix cost (Task Billable) Projects
* Time based (Log Billable) Projects

**Time base (Log Billable) Projects**

When possible the PC will bill out all the hours logged into Club if he/she agrees that the time was productive and the Client will also agree.

**Fixed cost (Task Billable) Projects**

For fixed cost projects, the MSA will clearly describe what hours will be invoiced. The PC needs to manage ‘scope creep’. Team should still log their productive time, but what gets invoiced will be based upon the MSA.

**Possible reasons why all the time logged into Club may not be actually invoiced to Client:**

* New Client
* New technology
* Less experienced team member(s)
* Poor estimation (we agreed to a fixed cost)

### Billable Hours Goal

Our overall company goal is 67% (2/3rds billable). In order to achieve that we need the correct team structure. The following describes the % billable goal for each domain for persons after their intro period:

| **Domain** | **Type** | **First Three Months** | | **Rest of Intro Period** | | **After Intro Period** | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Bill Goal** | **Hours/day** | **Bill Goal** | **Hours/day** | **Bill Goal** | **Hours/day** |
| SE, FE Engineer | Freshers | - | - | 50% | 4.0 | ~80% or 88%\* | 6.5 or 7\* |
| Experienced | 50% | 4.0 | ~80% | 6.5 |
| QA Engineer | Freshers | - | - | 50% | 4.0 | 75% or ~80% | 6 or 6.5\* |
| Experienced | 50% | 4.0 | ~80% | 6.5 |
| UI UX Designer | Freshers | - | - | 50% | 4.0 | ~70% | 5.5 |
| Experienced | 50% | 4.0 | ~70% | 5.5 |
| Tech Lead | Experienced | 63% | 5.0 | 63% | 5.0 | 63% | 5.0 |
| Cloud/Server Support | Experienced | 50% | 4.0 | 50% | 4.0 | 50% | 4.0 |
| Project Coordinators  Network/Server Support | Experienced | 25% | 2.0 | 25% | 2.0 | 13% | 2.0 |

**\* The lower number is for the persons who are responsible for mentoring, training, interviewing, etc.**

To achieve this goal, we have given goals to each of the team members which are found on the [Weekly Updates](https://docs.google.com/spreadsheets/u/0/d/1HhrsoaOWCSpFBBRSy6x1hYfTGDxD6r3ruMMLMJ5QSy4/edit) sheet. Please note that some individuals have different billable targets depending on their experience level and amount of time with Rubico.

There are several reasons why an employee may not achieve their billable goal. Some of them include:

**Sales Team Lacking**

* Rubico does not have enough projects.
* Proposal team underestimates the work (for a fixed cost project).

**Employee Lacking**

* Rubico has some but not enough projects according to the person’s skills.
* Rubico has projects, but does not yet have confidence in the employee’s current competency.
* The employee is slow in getting tasks done.
* Quality of work of an employee is lacking resulting in work having to be redone or Client unwilling to pay.

**Development Team Lacking**

* Collaboration has not been good and the project fails due to lack of Team cooperation. Need to improve Teamwork!
* There is not enough experienced leadership to do the project.

**Client Management Lacking**

* Client expectations are not managed well resulting in work being done without proper payment from Client.

How to increase your Billable Hours?

* The Sales Team can find more work. Try to motivate them to bring work that you are most capable and interested in.
* Employees can learn new skills to participate in other work.
* Assist the PC to identify change requests and out of scope tasks so they can properly get them billed to the Client.

### What Projects are Billable?

All the projects that are listed in the OPPM Sheet (Active or Completed) are billable projects.

* Some projects are directly billable to Client for example:
  + Plum Creek Farm - Label Printing iPad App
  + The Freedom Fight (PWA)
* Some projects are billable to Rubico Inc for example:
  + Timesheet App
  + Rubico - Employee Portal
  + [www.RubicoTech.com](http://www.rubicotech.com)
  + [www.RubicoTech.in](http://www.rubicotech.in)

Working on all of such projects will add up to your Billable goal.

### What Activities are Billable?

PC (as well as all other team members) do many activities which the majority of the time can be billable to the Client. Possible billable activities include:

* Reviewing Deliverables (Testing / QA activities)
  + Test Artifacts
* Updating SpecDoc
* Content Creation (for wireframes, mockups etc)
* Communicating with Client (email, chat, voice, meetings (1 resource)
* Requirements Gathering, Analysis & Estimation
* Internal Project Meetings discussing requirements
* Stand-ups meetings
  + Create a category called Project Management,
    - add a task called Stand-Ups
    - add your time to that task
    - make sure there is no labels that mark this as internal
* Client Training and Support
* Executing Change Requests
* Troubleshooting/Estimations
* Consultation, Knowledge transfer to Client
* Research:
  + Specific, project related research - Billable.
  + If the Client is driving it - Billable.
  + Business logic research/learning - Non-billable until competent.
  + If Rubico is driving it - Non-billable.
  + General, career related learning - Non-billable.

Usually the following are not billable activities:

* Updating Master Doc
* Updating Timesheet
* Internal Team meetings relating to collaboration, protocols, human resource and management
  + i.e. You are stuck with a task and need to discuss with the team. HR calls you to discuss the restructuring of the project’s team. .
* Internal Management Reporting
* Internal Project Management Tools implementation
* Keeping Management Docs up to date
* Evaluating Project Progress
* Internal Project Audits

### When Buying Third Party Services/Tools for a Project

To ensure that every work related to the project is being logged, resources including the server administrators and admin staff need to update their hours in Club whenever working on any purchase requirements for the projects.

Possible billable activities:

* Efforts taken to check the compatibility of the required device in the marketplace (e.g finding the best and efficient equipment/ device)
* Placing orders and managing the purchase and approval sheet to track the logistics/progress of the order.
* In circumstances where the device is taking a long time to get delivered for the purchases made through online stores, When admin/support staff can take efforts to search the availability of such purchases in local stores.
* In cases where the device/equipment requires assembling/dismantling/service to check for faulty parts or fix the devices.

At the end of the process, the PC may coordinate with the RM/Finance Admin to define what is the percentage/hours to bill to the Client.

### Third Party Purchases

With approval of the Client, Rubico may purchase third party services/tools on the behalf of the client. Unless otherwise specified, there is an administrative service fee of 15% (or a minimum of $5) for these “materials”. Examples of third party purchases include SSL certificates, plugins, themes, extensions, servers, stock photos/artwork, etc. To request such purchases email [billing@rubicotech.com](mailto:billing@rubicotech.com). Use the Timesheet App to record the purchased item. It will automatically apply the service fee by default.

## Exporting Billing

**1st working day of the month** - developers review and finalize all hours from the previous month. Ideally they should only be logging hours from the last day of the previous month.

**2nd working day of the month** - PCs review the hours in Club then import the hours into the Timesheet App. After the hours are imported, click the “Send report” button to email the Client (and CC’ed to PC and RM) a copy of the hours. This ensures there are no surprises when they get their invoice a few days later.

### *Step-by-step billing process:*

1. Review hours in Club (weekly!)
2. Go from Club to timesheet dashboard and import hours from Club using the “Import timesheet” button - this brings it to public/Client visibility for weekly communication purposes (weekly!)
3. In the timesheet go to a particular project and import monthly hours into the billing sheet- this will be reviewed by Indian and US Admin and an invoice will be sent. This is done monthly as early as possible, but no later than 2nd.
4. Ensure that Club hours match Time App hours by reviewing them from the Billing Sheet option in the left menu of the Timesheet.
   1. If anything is not to be billed to the Client, please mark them non-billable from Club.
   2. In case, there is an update to be shared with the billing team regarding expenses or credit card use (for testing), add a note using the “i” button. This will notify billing about extra expenses for that month.
5. Once the hours match the Timesheet and Club, mark the checkbox.
6. To notify the Client about the monthly hours use the “Send Report” button. This must be done at the end of the month once the hours are final.

**3rd working day of the month** - Alan Anil and Steve Surya audit project billing from each PC and approve them in the Timesheet App billing dashboard and then inform Brandon George for Rubico US to invoice the Clients.

Projects can have the following category of projects as per different milestones in the project lifecycle like:

**Active** - Team is actively engaged in a project and has regular meetings with the Client. Hours are rounded to the nearest 0.25 hour (15 minutes). Client is a [High Volume](#_r0bzi45xt4k5) Client.

**Maintenance** - Team is supporting the Client and working on small tasks and does not have regular meetings with Client. Hours are rounded to the nearest 0.5 hour (30 minutes) with a minimum of 1 hour per day billed. Client is a [Low Volume](#_r0bzi45xt4k5) Client.

We charge a higher rate to many of our Clients after the project lifecycle ends and we start doing ad-hoc maintenance tasks (small tasks).

**Monthly** - We have a committed agreement (retainer) where Client is paying us monthly for supporting their project(s). We do not have regular meetings with the Client, but do have regular work.

Each project also has different types of tasks which we can classify as following:

**Task Billable -** This is for fixed cost tasks.

**Log Billable Tasks -** The billable hours for each feature should be verified by the PC in Club

You can check the billing hours of your project/tasks in Club:

<https://club.rubico.tech/reports/assignments>

If you are not able to find the hours you want to bill in this month in the Timesheet App then please discuss with Alan Anil and Steve Surya

Note: Whenever our project is 'over' and we don't have any weekly meetings with them anymore, then we need to inform billing@RubicoTech.com so any small tasks we spend from that point onward are billed at the higher hourly rate and project status will be “Maintenance”.

### Managing the TimeApp

All PC’s are required to update the Timesheet/TimeApp at least one time per week for their projects and discuss the same with the Client during the weekly meeting as an Agenda point in the Project Master document.

### Managing the Deposit

**Why does Rubico collect a deposit from Clients?**

* Rubico collects a deposit from a new Client so we have some kind of assurance of the Client’s ability to pay for our services. The Deposit is normally equivalent to 4 weeks of the expected burn rate (e.g @30 hrs/ week the total burn rate will be 120 hours).
* Case 1 - Non-phase approach
  + We will collect the ~4 weeks deposit upfront based on the burn rate
  + In the event that the burn rate increases, Rubico may increase the deposit proportionately.
* Case 2 - Phase-wise approach
  + Phase 1 (Discovery/Wireframing/Design)
    - First Invoice 30 hrs refundable deposit
  + Phase 2
    - Burn rate @30 hrs / week
    - Second Invoice will collect a deposit of 90 hours (120 hours minus 30 hours)
* Discovery/Wireframing/Design Phase Refundable Deposit
  + Rubico requires an initial deposit of ~15-30 hours to initiate resources. This deposit will be credited or refunded back after all work is completed.
* For existing projects where the Refundable Deposit was agreed in different terms, the PC can reach out to the Finance Admin to determine how to proceed.

**How does the Deposit get added to the Timesheet/TimeApp**

* The PC needs to record the deposit hours in the Timesheet App using the Deposit feature.
* The amount of hours taken as a deposit can be found in the Team Composition email.

**When should the Deposit be returned (e.g. returned to the Client)?**

* The RM and Finance Admin will manage the return of the deposit to the Client.
* The deposit will be returned when the Client requests it or after 6-12 months of no work.
  + If the PC receives a request from Client, they should forward the request to the RM so that he can manage with the Finance Admin the return of the same.

### Additional Project Billing and Payment

PC will make sure that the hours added by the employee in the [Extra Project Timesheet](https://docs.google.com/spreadsheets/d/1ISdh3IR8urftmE1B1noAotjZnbGGmXMIUAWn25m_psY/edit#gid=363507542) are added in Club as well and are exported to their monthly Billing sheet.

PC will provide their approval on the [Extra Project Timesheet](https://docs.google.com/spreadsheets/d/1ISdh3IR8urftmE1B1noAotjZnbGGmXMIUAWn25m_psY/edit#gid=363507542) if Rubico should pay to the employee.

Kevin Kundan will make sure to put the hours in the [compiled sheet](https://docs.google.com/spreadsheets/d/13J5BSHzd5lSrGIrWDrtQmCHc0pTCnXB46p4FC3QmsII/edit#gid=974184366) for the Payroll Admin and will leave a comment for the Payroll Admin to discuss with the Operations Director and pay to the employee.

## Rounding Hours

Two types of Clients:

1. High Volume Clients give significant hours regularly
2. Low Volume Clients give only a few hours sporadically

If it is unknown the type of Client, then ask the PC.

**High Volume Clients**

Round up to the nearest 15 minutes (minimum of .25 hour). This category also includes Clients with a signed Monthly Maintenance contract for Project work.c

**Low Volume Clients**

Round up to the nearest 30 minutes. (minimum of 1 hour). This helps to compensate for the time spent in billing, etc.

*Example:*

We have a Client and we complete their website development work. Now Client wants us to update their site when required.

On 1st of January the Client has given some photos to add to their website and the following people spent time on this task:

* PC spent 15 minutes
* Graphic Designer spent 15 minutes
* Software Engineer spent 15 minutes

The next day Client gave the PC a link to add on the homepage which the PC did himself which took 15 minutes.

**How many Hours do we Bill? Answer is 2 hours.**

Client has given us two different tasks at two different times. In such a case we will bill one hour for each log (total 2 hours).

If the Client would have sent us both tasks at the same time (we get this work together in one day), then we would only bill one hour.

## Billable Hours (Client’s Perspective)



**Must Deliver Value** (not just a timesheet)

Billable hours are not equal to Actual Hours. Billable hours are equal to the actual hours of time spent providing **value** to the project (Client). Time a person spends building their skills/training/attending non-project meetings, etc are not billable.

**Experienced vs Inexperienced Developers**

Less experienced developers can only provide 50-75% billable time (4 to 6 hours per day). More experienced developers normally can give 7-8 billable hours per day. Normally, it is expected that for 16 hours/day of billable PHP development there will be more than 2 developers actively involved in the project in order to cover for one another’s deficiencies and leaves.

**India vs USA Development Time**

A Client needs to experience that 1 billable hour from India is similar to 1 billable hour from a programmer in the USA. A common concern from USA Clients is that India programming can take significantly more time than a local USA programmer. We need to make sure that there is not a significant gap in the difference. Reasons for the gap include: cross-cultural communication, English as a second language, lack of USA industry knowledge, lack of understanding of western social dynamics, etc.

**Change of Resource**

It is also assumed that there will not be a change of Resource on the project without the knowledge of the Client. The Client does not expect to pay for training/ramping up a new Developer if there is a need for a developer to leave the project. Any changes in HR need to be discussed transparently with the Client.

# Client Management

## Customer Support

### PC escalation to RM

If you need support from RM in communicating your challenges/information to Client, here is a link for [sample emails](#_w7w8tid2x1fs) you can use.

### Best Practices for Relationship Managers (RM) [copied from Gold Book]

1. Continue to ask Client for Feedback
   1. Whether good or bad, please ask the Client if they have expressed this before to the PC.
   2. Always think the best of the India team ...hold off judgment until you have “both” sides of the story.
   3. If you believe things may not be going very well, then first talk to the PC and ask them “What do you think the Client will tell me when I ask them how the project is going?”. The PC may also tell you that “now” is not a good time to ask the Client for feedback...it may be better to wait a bit while the PC sorts out some current concerns of the Client.
2. Motivate the Client to express their challenges/concerns directly with the PC
3. Spend time discussing your projects with the PC
   1. Call the PCs cell phones if needed.
   2. Take a “coaching” approach to discussing projects with the PCs
   3. Tell the PC that their job is very important and you want to support them!
4. Escalate only when Necessary
   1. Only contact others when you believe the PC needs help (this assumes you have discussed it with the PC first). Ask the PC if they have communicated the challenges with OPPM or others. Sometimes it is better for the PC to escalate it rather than the RM.

### How do PC’s Manage Timeline Expectations of Clients

| **TIMELINE** | | | |
| --- | --- | --- | --- |
| **Task** | **Waterfall Projects**  **(Small Projects/Wireframe-Design Phase)** | **Kanban** | **Scrum** |
| Timeline | ✓ |  |  |
| Sprints |  |  | ✓ |
| Due Dates |  | ✓ |  |
| Discuss the timeline with the client at least once every 2 weeks | ✓ | ✓ | ✓ |
| [Project Retrospective Meeting](#_z0mxjvajg1ac)\* | ✓ | ✓ | ✓ |

\*[The Project Retrospective Meetings](#_z0mxjvajg1ac) should be scheduled at the beginning of the project for every project (Wireframe, Task Based, Waterfall Kanban, or Scrum based projects).

For scrum based projects these meetings should be scheduled at the end of every even number sprint).

The PC is responsible to provide tentative dates for the RM to reach out to the Client and propose a [Project Retrospective Meeting](#_z0mxjvajg1ac), these dates should be reflected on the timeline, Sprint plan and/or a specific timeline for the retrospective meetings.

### How do PC’s Manage the Resource(s) Allocation

When you face challenges related to the resource allocation (i.e. Resource on leave, competency, burn rate, etc.) you may take the following steps to manage the situation:

* If you need an additional resource, for a different domain requirement, and/or burn rate increase:
  + **Review:** The OPPM sheet, RE-HDR/DDN sheet and consider the resources that are available.

When you find a resource that you think would be the best candidate for your project and has time available then you can choose to **Coordinate**, if not you can move to **Request**.

* + **Coordinate:** You may coordinate with the resource(s) and the PC(s), that might be utilizing the resource(s), to avoid over committing.
  + **Request:** If you can’t find a resource, you should submit a request on the OPPM Support form ([HDR](https://docs.google.com/forms/d/e/1FAIpQLSe0vcEHiq_ylWnfDQo7nDQA2mP4kW95Cpavjlp74D_Acc3cFg/viewform)/[DDN](https://docs.google.com/forms/d/1lLl9J8ThiML726uJrPJMXAbubNhcvvmQg8jSLGOgc1E/edit)) requesting the resource to be assigned. If the OPPM review’s your request and concludes that you can solve the problem, OPPM will communicate to you for you to work on the **Review** or **Coordinate** steps again.
* If we don’t have a specific resource available, the PC should communicate proactively to the Client when Rubico is expected to have a resource available.
* If you have collaboration challenges with the resource:
  + Refer to [What if someone is not being accountable?](#_gq7wcjzfiqpj)

### How do PC’s Manage Budget Expectations of Clients

For Sprint Based Projects:

* Every sprint has to be estimated prior to starting the development
* The estimate should be prepared considering the [How Rubico does Estimates](https://docs.google.com/document/d/1dpRKL3ZtC-_cAJRx_ERiJ8AgqqvRf_sncx86_y7Zi0E/edit#heading=h.79ml5mr77umd)document.
* The estimate should be communicated to the Client using the text provided [How Rubico does Estimates](https://docs.google.com/document/d/1dpRKL3ZtC-_cAJRx_ERiJ8AgqqvRf_sncx86_y7Zi0E/edit#)
* The [burn rate](#_tv61lywum789) should be communicated on the master doc and updated weekly and communicated to the Client.

For Non Sprint based projects:

* Make sure that the team knows what exactly are the requirements and plan the week based on those.
* Burn rate can be calculated based on the requirements and should be communicated on the master doc and updated weekly and communicated to the Client.
* The backlog should be prepared for each minor - major task and should be moved on the PM Tool accordingly.
* If some tasks are pending or not complete, this should be pushed to next week's delivery and made sure to be communicated to the Client, especially if the team thinks that the timeline can be affected.

### Burn Rate

PC may calculate the Weekly Burn Rate in this way:

| **If the Client is flexible with the Deadline\*** | **If the Client has a hard Deadline\*** |
| --- | --- |
| # Individual Billable Hrs x 5 days = Individual Burn Rate  IBR x #Resources = Total Burn Rate per Week | # Estimated Hrs left in the project / # Weeks Left |

**\*** Every Burn Rate calculation should be round up to the nearest multiple of 5

Guidelines to consider when setting up the Burn Rate:

* What is the required Burn Rate from the Client
* What OPPM can provide
* Always consult with the team before you disclose the Burn Rate with Client
* If Client requests a change in the timeline that would reduce the time for the project, the PC should consult with OPPM if this is possible.

How often to update the Burn Rate

* For sprint based projects, every two weeks, for non-sprint projects it should make it an agenda point once a week. If a project is under maintenance, the Burn Rate can be reviewed once a month, or if the project is a task based project that would require less than 100 hours, the Burn Rate does not need to be discussed with the Client.

Communicating and explain Burn Rate to Client:

* PC should use the Master Doc to communicate with Client the Burn Rate using the [Master Doc Template](https://docs.google.com/document/d/1XTB6WkLER7Li_mgeqyL3Oe0bhoJToJgdD4DBszH2oJ0/edit#heading=h.wy77h93ysn1c) suggested text.
* Take time and confirm with OPPM and Team before you communicate with the Client.

### “It’s ready”; What Does that Mean to a Client?

When we tell the Client that a deliverable (or project) is ready (or done) what are they expecting?

If you tell them “it's ready” they believe that:

* It is pixel perfect
* Been thoroughly tested by our software engineer
* Validations and error messages are all proper
* The PC has reviewed it
* Features are all included and functioning perfectly
* SEO is done properly (when relevant)
* It is ready for the Client to do a final review

Do NOT say “it is ready” but instead state exactly what you mean...like:

* Version \_\_\_\_\_\_\_\_ has been fully tested by our QA team and is ready for your final review by logging as an admin user into this url: \_\_\_\_\_\_\_\_.
* The current features listed on Trello card \_\_\_\_\_\_\_\_ are ready for your review but please note that the features listed on Trello cards \_\_\_\_\_\_\_\_ are not ready for you to review.
* The feature has been tested for functionality but the frontend layout has not been tested.
* We have completed our checklist (link) and believe it is ready for you to review and put your feedback on Trello/Bugherd/etc
* Please check this \_\_\_\_\_\_\_\_, but do NOT test this \_\_\_\_\_\_\_\_.

In summary, always state what is ready and what is NOT ready. Give a definition of what “it” is.

### Projects Escalation

An occurrence in the project life cycle which has been raised either due to internal/external entities and calls for a Plan of Action to be put in place to resolve it.

### Matrix

| **Type of Challenges** | **Level 1** | **Level 2** | **Level 3** |
| --- | --- | --- | --- |
| **Account Management** |  |  |  |
| * Contract (Time & Material) * Communication/Cross Cultural Issues * Behavioral | Relationship Manager | Stan |  |
| * Commissions * Invoicing/Past Due/Collections * Credits/Refunds/Changes in Payment Terms | Relationship Manager | Brandon |  |
| **Project Delivery/Satisfaction** |  |  |  |
| * Timelines * Deliverables * Billable Hours (Log Billable Projects) * Quality * Resourcing (e.g.unplanned leaves, resource unavailability) | PC | OPPM | Stan/Carlos |

### Service Level Agreement (SLA)

We are committed to provide reliable and prompt support to our Clients according to our [SLA (Service Level Agreement)](https://docs.google.com/document/d/1ODvn3X_3FS8v7uhswk2hOnZY-BzVGvgK1Y1MXR2a1_o/edit#heading=h.al2k7q4jti2j). In addition to the [SLA](https://docs.google.com/document/d/1ODvn3X_3FS8v7uhswk2hOnZY-BzVGvgK1Y1MXR2a1_o/edit#heading=h.tgebv2czy36z), you should know the following:

| **Active/Committed# Projects** | **Inactive/Uncommitted Projects** |
| --- | --- |
| * PC reviews and acknowledges * PC defines Severity and schedules team to start work according to level of Severity * For Emergency Support (mission critical) it is billed at **2 times the regular billable rate** if   + the issue was not caused by Rubico   + And the team is working in the middle of the night (1:30pm to 10pm EST / 12am to 9am IST). * For Emergency Support (Mission critical) Software Engineer log 2x log in Club. Ex. If SE actually took 3 hours to do the task he/she will log 6 hours in Club. | * PC acknowledges receipt of request * PC defines Severity * If the issue seems to be an emergency (mission critical): * Then reply asking if the Client would like “Emergency Support” which is billed at **4 times the regular billable rate** (If they want to know the exact rate then Client can ask the RM). See [Sample Emails](https://docs.google.com/document/d/1HAUOvFj0e2cAiSx_3myJnH-3tyiNZ7H9yJCFhUrWD4g/edit#heading=h.9x9pwka4jfi5) * Assemble the team and proceed as Mission Critical severity * For Emergency Support (Mission critical) Software Engineer log 4x log in Club. Ex. If SE actually took 3 hours to do the task he/she will log 12 hours in Club. |

# Active/Committed Projects/Clients include (any of these):

* Projects listed on the OPPM (not gray color font) HDR, DDN or USA tab
* Rubico Hosted Projects (and the issue relates to hosting)

The [Issues and Bug Management](https://docs.google.com/a/ithands.com/document/d/15NPrTC4I8v8-8u4vuH7K0HliIDVVwI2tpORtTd3Qy3A/edit?usp=drive_web) doc is shared on the Master Doc with the Client and important to review with Clients at the beginning of the project. The [SLA](https://docs.google.com/document/d/1ODvn3X_3FS8v7uhswk2hOnZY-BzVGvgK1Y1MXR2a1_o/edit#heading=h.tgebv2czy36z) is important to review with the Client at the beginning of supporting and maintaining a project.

See [Sample Emails](https://docs.google.com/document/d/1HAUOvFj0e2cAiSx_3myJnH-3tyiNZ7H9yJCFhUrWD4g/edit#) for responding to a Client who reports an Issue.

### Involving the Client about Updates and Upgrades

It is important that the Client is properly involved and informed of the process we follow. Please refer to the [Sample Email doc](https://docs.google.com/document/d/1HAUOvFj0e2cAiSx_3myJnH-3tyiNZ7H9yJCFhUrWD4g/edit#heading=h.di0rf4wo2d2p) for help in communicating.

### Timeline Extension

Time extension requests are normally due to the following circumstances:

* Change in identified scope: New or Extra Work not included in the original scope or contract
* Specific complexity not yet determined/understood within the requirements.
* Unexpected change of key resources within Rubico (such as death or departure of a key developer)
* Change of product owner
* Delayed response from Client

A Time extension when properly presented should contain the following:

* Indicate specific issue causing delays
* List of activities from project schedule being affected by the aforementioned issue
* Exact amount of time being requested specifying working days or calendar days
* Indicate the actions taken to avoid or minimize other delays

Time extension request should also consider the following:

* Calendar days are not the same as working days
* Be sure that the time extension requested is enough to cover all delays including additional items that might be affected
* Be sure to understand the changes being proposed and the ramifications of those changes
* No additional time should be requested once it has been approved

[**Sample Email**](https://docs.google.com/document/d/1HAUOvFj0e2cAiSx_3myJnH-3tyiNZ7H9yJCFhUrWD4g/edit#heading=h.bywwdghvaylg)**: Explanation and Apology for Timeline Extension**

Reference: <http://construction.about.com/od/Claims-Management/a/Time-Extension-How-To-Request-A-Time-Extension.htm>

### Protocols for Project Coordinators Relating to Estimates

Most projects have some scope creep. Clients will ask for features on their project which are not included on the Proposal. The following are the protocols for a PC regarding new tasks.

## Estimation Process for Existing Clients

### Rough vs Precise Estimates

Rubico is happy to provide estimates that can help guide the Client in budgetary prioritization and planning. When requested Rubico can provide the Client with an estimate for each task/feature/project as requested (See [How Rubico does Estimates](https://docs.google.com/document/d/1dpRKL3ZtC-_cAJRx_ERiJ8AgqqvRf_sncx86_y7Zi0E/edit#heading=h.79ml5mr77umd) for more details). Estimates provided by Rubico fall into these two categories:

|  | **Rough Estimate** | **Precise Estimate** |
| --- | --- | --- |
| The outcome of a  **Task** Estimate | The task could take a person:   * About an hour * About a half day’s work * About a day’s work * Around a few days’ work * About a week * More than a week | Approximately \_\_ hours |
| The outcome of a  **Project** Estimate | The project could take about \_\_\_ sprints/weeks/months with a burn rate of around \_\_\_ hours per week | A Sprint Table or a Task Breakdown  (see the samples below) |
| Assumptions | Major assumptions may exist but may not be communicated specifically. | Major assumptions are communicated. |
| Approximate Accuracya (assuming no scope change) | ~60 to 70% | ~75 to 90% |
| Scope Definition | Somewhat clear but fluid | Well defined and unlikely to change |
| Most common scenarios | Brainstorming and prioritizing a new project (or feature) or possible scope changes. | When stakeholders want a precise budget and timeline |
| Effort spent estimating | “Quick & Dirty” | Planned & Thorough |
| Time spent estimating is... | Not Billed | Billed |

PC with the help of the project team works on the estimate:

1. Clarify with the Client that estimates are never exact, refer them to the [How Rubico does estimates](https://docs.google.com/document/d/1dpRKL3ZtC-_cAJRx_ERiJ8AgqqvRf_sncx86_y7Zi0E/edit#heading=h.79ml5mr77umd) document
2. The estimate can be provided in a Google sheet to maintain clarity
3. Please do not provide exact numbers like for e.g. 123 hours. Rather round up to the nearest 10 or 25 hours to indicate it is an estimate and not very precise.
4. During the scoping of the project and the wireframe process, you can give a rough estimate for the ideas/screens that you are finalizing with the Client, so that they can have an understanding of how many hours the project may take
5. If the estimate is more than 80 hours, review the estimate with the RM (or Stan).
6. The PC can send the estimate over an email to the Client copying the RM and add the following note along with the estimate

**This is a “Time and Materials” estimate and therefore we will bill the actual hours spent working with you on this project. If this project takes more than the above weeks then you should expect the number of hours to increase accordingly. Rubico agrees to proactively communicate with you in the event the timeline (and therefore the budget) exceeds the above estimation.**

### Estimation Process for Inactive Clients

If there is a request from the Client for an estimate, PC can contact any of the BD team members. BD team will work on the proposal and deliver it to the Client.

### Proposals/Estimating a Project



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%229sYDcFps2jC4KGZRKFF7%22%7D)

**FAQs**

1. **What are the 3 different forms of communicating cost to the Client?**
   1. Ballparks
      1. Ballparks are giving by Rubico US team members
      2. Ballparks are often given to validate/qualify a prospect
      3. India team do NOT do these
      4. PCs should go to the RM if they need help.
   2. Estimates
      1. Estimates are prepared by the PC and team.
      2. Needed when Clients request cost (and sometimes timelines)
      3. See [How Rubico does Estimates](https://docs.google.com/document/d/1dpRKL3ZtC-_cAJRx_ERiJ8AgqqvRf_sncx86_y7Zi0E/edit#heading=h.79ml5mr77umd)
   3. Proposals
      1. Proposals are created by SA and RM.
      2. These are formal docs (presentation) with complete descriptions, etc prepared by the SA
      3. Proposals can take from from 1 to 5 business days to do.
      4. If the new Proposal doesn’t align with the existing MSA, then a new MSA will need to be prepared and signed by the Client.
2. **What is the Process when a MSA is signed?**
   1. Once the MSA is signed, sales team will send a copy of the signed MSA to SA
   2. SA will give a team copy of the Proposal (and MSA if needed) with hours to OPPM for the team.
   3. SA will update the [Master Proposal Billing](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AquDncT0R_3FdHFjYi1PdGIzTGhPYmdnOTJXdEVuRXc#gid=5) for [Finance Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.swpv01j8jesm) to invoice.
   4. The [Master Proposal Billing](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AquDncT0R_3FdHFjYi1PdGIzTGhPYmdnOTJXdEVuRXc#gid=0) and [Master RUBICO Billing](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0An7J_rTCjSKndGJORVFQWUQ3MWNMZjAxR1FTUS0yQmc#gid=47) sheets are the protocol for all the communications that happen during billing.
3. **What do I do if a Client asks for something that is not on a Proposal?**
   1. You ask the Client if they want a Rough or a Precise Estimate. See [How Rubico does Estimates](https://docs.google.com/document/d/1dpRKL3ZtC-_cAJRx_ERiJ8AgqqvRf_sncx86_y7Zi0E/edit#heading=h.79ml5mr77umd)
   2. There are 3 different options (depending on the situation):
      1. You forward the request to the relevant SA.
      2. You create a project [Collab Sheet](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AquDncT0R_3FdDQ3TFQza0Ryd1h5aG05S1BSNkZKcVE#gid=0) to list out the tasks and have a place to put the hours on it.
      3. Or you provide the Client an hours approximation if it is regarding the project you are already working on.
4. **When should the request be forwarded to the SA/BD team (and not an Hours Approximation be given)? The request should be forwarded to the Proposal Team if ANY of the following is TRUE:**
   1. if the feature is a “new” feature and PC is unsure if the Rubico team can do it
   2. if the Client is “undecided” if they want the feature or not (the Relationship Manager can convince the Client to give us more business)
   3. if it is unclear why the Client is asking for the feature
   4. If the request is for a new project, then RM and BD team can be pulled in to define if a new MSA is needed
5. **When can the PC give an Hours Approximation to the Client?**
   1. The PC can email an hours approximation to Client for small tasks
6. **What is the definition of Tasks?**
   1. Tiny task (1 hour approximately)
      1. Proceed with the change and make the task “log billable”. The accounting will decide whether to bill or not.
   2. Small task (2 to 40 hours)
      1. Hours Approximation
      2. OR Estimate
   3. Medium task (40+ to 80 hours)
      1. Estimate is required
      2. PC should involve the SA
   4. Large task (80+ hours)
      1. A new MSA may be required (In case of a new project or if the Client is inactive).
      2. If the Client requests to change the agreement model, then a new MSA may be required.
7. **What format should the Hours Approximation be in?**
   1. Email or put on a Google Sheet (no pdf is needed)
   2. PC should mention it within Master doc
8. **If I email Hours Approximation, who should get a copy of the email?**
   1. Cc: Relationship Manager and SA
9. **If the Client says “yes” to the Hours Approximation what do I do next?**
   1. Forward a copy of the acceptance to the Relationship Manager, SA, [HR](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.g548h3nwl908) and Carlos
   2. Update the Master Doc decision log section and ask the Client to fill out the decision date section as a consent
   3. Proceed with the task
10. **If the Client asks how many $ per hour, what do I answer?**
    1. Different Clients are charged different hourly rates therefore PCs should not be discussing actual dollar rates with the Client.
    2. Forward the email to the Relationship Manager and SA who will be able to answer the question about the actual hourly rate.
11. **What is the difference between Proposal & Estimate?**
12. If it is a new project then a proposal is created by the SA (and RM). An estimate is what a PC prepares and gives to the Client.

## When receiving an existing project

### 

### **If the project was developed by someone else outside or within Rubico, you should consider the following check list for Handover and Post- Handover:**

### **Handover Checklist**

* Do you have access to the Code Base
* Do you have the Server credentials and access
* Have you received Technical KT
* High-level documentation - List of technologies (Versions)
* Feature Document - High level list of all features
* High-level server architecture diagram
* Access to environments (Staging, Live, etc.)
* Pending/Open Modules
* Team distribution - Profile + Roles (Gauge potential resource allocation needed)
* Credentials for all APIs
* Credentials for other third party dependencies (eg. PlugIns, etc.)
  + Check for the ownership of API keys and make sure that the relevant entity owns the keys
* KT for Deployment & Hosting (Overview)

**Post Handover**

* Revoke repo, environment, etc. access of previous companies
* Change API credentials
* Change Server alert notification Email id (if the responsible person is changing)

## Crisis Mitigation

[Crisis Mitigation Process](https://docs.google.com/document/d/1TB4kawbN9opuf7VwqcVbuIRYInbfLU51jaDJz0BEa28/edit)

### Expectations for the PC

The PC gets a phone call from the Client any time during the night. The Client has an emergency that needs to be rectified. What happens next?

1. **Determine whether or not the situation is truly an emergency.**

What would be considered a Crisis?

Immediate (Mission Critical Emergency Support)

* 1. Issues that, if not addressed and resolved immediately, may result in failure of the project.
  2. Defects that cause disastrous consequences for the system or owner and are in need of an immediate “workaround” or solution (Could be critical loss of data, system availability, security, safety, or money, etc.)
  3. Usually, this “Immediate” Priority is only relevant for software that is “live” on the production server and is used by customers/Clients.
  4. Any mistake or error caused by Rubico that incorrectly or inadvertently reaches a Client's customers.

1. **Send a short/brief email to the Client after the phone call**

It is extremely important to communicate frequently with the Client during Mission Critical (Emergency) Support. Keep in mind that the Client may also be required to update other stakeholders/his Client. Here are some guidelines to follow.

Immediately acknowledge the Client's phone call/email. The preferred message would be something like,

* + “We are checking this issue. Will keep you posted on the progress and will update you within an hour.”
  + Do not be too wordy. You need to fix the problem ASAP.

[Sample Emails](https://docs.google.com/document/d/1HAUOvFj0e2cAiSx_3myJnH-3tyiNZ7H9yJCFhUrWD4g/edit#heading=h.9x9pwka4jfi5)

1. **Internal Communication**
   1. Communicate with the relevant team members immediately: PC, Tech Point, Server Team, RM and OPPM.
   2. Assemble the Team
      1. Do not panic.
      2. PC to bring the **entire project team** together (developer, tech point, network administrator, etc) on a call and do a brainstorming session of the “Issue in hand”.
      3. **Since it is clearly a “Crisis” include Stan too.**
2. **Stabilize the product**

Define a strategy to restore the server, site, and keep it away from any attack that is trying to bring down the product.

* 1. Make a Plan
     1. Document the plan of action for the team in the Internal doc. Build 2 plans, so that if Plan 1 fails the team can fall back on Plan 2 immediately.
  2. Execute the Plan
     1. Implement the action Plan 1. Then review and analyze the situation.
     2. Implement the action Plan 2 (if Plan 1 did not work). Then review and analyze the situation.
  3. Review the Results
     1. If results are not satisfactory, contact relevant others (like the Executive Team) asking for their help and advice.
     2. If the issue is not resolved then start over with step 1 above

1. **Update the Client**
   1. Define what needs to be communicated to the Client, who and when.
   2. Be extremely transparent about what is going on during the challenges.
   3. PC to communicate via email to Client and team on the situation stability. Refer to [Communication Protocol for Crisis Management Email Samples](https://docs.google.com/document/d/1HAUOvFj0e2cAiSx_3myJnH-3tyiNZ7H9yJCFhUrWD4g/edit#heading=h.9x9pwka4jfi5) for help in communicating.
      1. **Medium to communicate with?**
         1. Email - Subject should clearly state “Project Name - Mission Critical”
            1. Same email trail should be used from incident Open to Closure
            2. All Stakeholders (Client + Rubico) should be there in CC
         2. See [Sample Emails](https://docs.google.com/document/d/1HAUOvFj0e2cAiSx_3myJnH-3tyiNZ7H9yJCFhUrWD4g/edit#heading=h.wz0qkhht9rwi) for help in communicating.
         3. If a Client is added on any of the chatting tools like Hangout etc. then use that for frequent updates/small discussions with the Client.
            1. All worthy decisions/ discussions on chat tools to be copied to the email
         4. If the team is not able to understand the issue, immediately schedule a Zoom meeting with the Client.
         5. Don’t hesitate to call a Client’s mobile phone. Calling a Client’s phone will make them feel more supported and cared for.
      2. **How often to communicate?**
         1. Update the Client ***every 60 minutes or less*** even if no significant progress has been made. The Client needs to know that you have not forgotten them and their emergency situation. Try to over-communicate!
         2. Communicate whenever you reach a milestone. For example:
            1. Issue has been identified.
            2. Cause has been understood.
            3. Progress has been made, etc.
      3. **What to mention on Progress Update emails?**
         1. Progress Update email should mention the current status and the next steps the team is taking.
         2. When we have identified the cause of the issue, if there are different ways of resolving the issue, talk through the different options with the Client and involve them in the decision making.
      4. **Practice empathy.**
         1. Clients need to experience a genuine feeling that we care about them and their business success. Actively listen to their challenges and involve them in overcoming the challenges.
2. **Assess the problem after it has been stabilized [Use the** [**template**](https://docs.google.com/document/u/0/d/1TB4kawbN9opuf7VwqcVbuIRYInbfLU51jaDJz0BEa28/edit)**].**
   1. Define a chronological timeline of the event.
   2. Look for the root cause of the problem.
   3. Define a strategy to prevent this from occurring in the future.
   4. Communicate with the Client the details of the root cause and the mitigation plan in case of future occurrences.
3. **When the issue is resolved then do ask the Client for a formal “Closure statement & feedback” on the email.**

### Expectations for the Team in a Mission Critical (Emergency) Support Scenario

Our Clients are from other countries (like the USA) and have different time zones, so our Clients work while we sleep. Sometimes our Clients face critical issues with their applications or the website we developed for them. They expect us to assist them 24/7 for emergencies.

Rubico does not want to disturb the employees between 12 Midnight to 8am IST, however in case of mission critical issues Rubico expects everyone to be reachable on their mobile 24/7. In case we are not able to connect with your personal phone we will connect with you on your local secondary number added to the [Rubico Work Time](https://ep.rubico.tech/workTime). The first point of contact is always the **Project Coordinator**. If the Client is unable to reach the Project Coordinator, then the secondary person is the **Relationship Manager** (RM) followed by any other people mentioned in the [Rubico Support Contact Info document](https://docs.google.com/document/d/1IqKg14HBCKIaa88_EYiOHfz9NECIdLu0rB3ki6vWyEo/edit#heading=h.yr39svz39j16).

### Winning Back the Trust of the Client

**Be Quick to Apologize**

The sooner you write an apology after an issue is discovered the better. Acting quickly can make the difference between saving or ending a business relationship. However, if the incident in question may result in legal or financial loss, it is best first to bring this to the attention of the RM before sending.

**What to Include in Your Apology**

Usually, if you acknowledge you've made an error in judgment or were wrong in some fashion and express your regret sincerely, the person receiving the email will forgive the infraction and continue to do business with you. However, sometimes it takes more than words, and an apology must be accompanied by appropriate restitution to repair your business relationship.

Start by saying you are sorry. You want the intent of the letter to be clear. Next, offer an explanation regarding the reason for the letter. Acknowledge what went wrong and how you plan to rectify the situation. Along with extending the apology in a timely manner, be sure to promise you won't repeat the offense. At the end of the email, apologize one more time and mention you value the business relationship.

**Tips:**

* Write from your Heart!
  + Don't just grab a letter from a template and use it. You have to write your own email from your heart.
* Take full Responsibility.
  + State that it was your fault (even if it was not entirely “your” fault), do not attempt to blame it on someone else. It shows responsibility and maturity.
* Be Concise
  + Make sure the email is short and sweet; get to the point.
* Be Humble
  + You may have to bury your pride when you apologize. Pride gets you nothing, good relations can often become priceless.
* Ask for Help
  + If you have difficulty with wording your email, ask someone else for assistance.

For examples and samples of well written Apology emails, see the [Sample Emails](https://docs.google.com/document/d/1HAUOvFj0e2cAiSx_3myJnH-3tyiNZ7H9yJCFhUrWD4g/edit#heading=h.wz0qkhht9rwi) doc.

### Process when Client Needs Support

#### **Relationship Manager’s (RM) Role**

The following are the steps that a RM takes when a Client contacts them for support:

1. **Understand the Issue**
   1. Measure the severity of the request (is it an emergency that needs immediate attention or can it wait for several hours)....RM can refer to [Issues and Bug Management](https://docs.google.com/a/ithands.com/document/d/15NPrTC4I8v8-8u4vuH7K0HliIDVVwI2tpORtTd3Qy3A/edit) to aid them in determining the severity.
   2. Define if Rubico is responsible for the problem or not (if it is known)
2. **Communicate with Client**
   1. Empathize with the Client
3. **Hand off to Responsible Person(s)**
   1. Notify the responsible person(s) in the team of the issue...The responsible person usually is the Project Coordinator (PC) and/or the Tech Point.
   2. Both PC and TP are expected to be reachable on their cell phones for such situations unless there is a vacation responder activated on their email.
   3. If neither the PC nor the TP are reachable, then the RM should contact the OPPM Team.

#### **Responsible Person(s) Role**

The following are the steps a PC (or in some cases a TP) to take when a Client contacts them for support:

1. **Take Responsibility for Communication**
   1. Keep the Client informed of what is going on
   2. In case the issue is expected to take some time to get fixed, a timeline should be communicated by this person to the Client for when the issue is expected to be fixed.
   3. Manage Client expectations
   4. Empathize with the Client
   5. Keep the Relationship Manager informed
2. **Understand the Issue**
   1. Measure the severity of the request (is it an emergency that needs immediate attention or can it wait for several hours)....Refer to [Issues and Bug Management](https://docs.google.com/a/ithands.com/document/d/15NPrTC4I8v8-8u4vuH7K0HliIDVVwI2tpORtTd3Qy3A/edit) to determine the severity of the request.
3. **Assemble the Team to resolve the issue**
   1. Call the relevant team members together and fix the issue together
      1. If the website is not coming up and the issue seems to be of “Server Down” then this Person should call [Server Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.6b09ucdjdvxi).
4. **Test the issue with testing protocols**

### Collaborating with the RM (Relationship Manager)

1. PC should schedule a meeting with the RM whenever there are:
   1. Internal challenges
   2. Client challenges
   3. Additional services that can be offered
   4. Specific need for the RM to help
   5. Keep and meeting agenda document for each RM
2. PC should invite RM to the following meetings:
   1. Startup meeting
   2. First delivery meeting
   3. Major Milestones and delivery meetings
3. The RM should reach out to Client regularly
   1. After meeting with PC, RM should call Client and get a report and feedback about the project
   2. This feedback should be presented to the team for areas of improvement
4. RM follow up at the conclusion of Milestone
   1. PC notifies RM that a Milestone has ended
   2. RM and PC have final project status meeting
   3. RM send Client customer survey and ask for more work
   4. If needed, RM gives feedback to PC (can be shared at Review Report Meeting)
5. What topics are most important to the RM?
   1. Burn rate (estimated number of hours per week that Rubico is expecting to bill the Client).
   2. Timeline changes
   3. Master Doc up to date with all agenda points discussed and notes from the meetings
   4. TimeApp updated

### Relationship Beyond the Contract

The PC collaboration with the RM should look for opportunities to nurture the Client relationship in such a manner that we can go beyond the contractual relationships.

The suggested activities below will help in taking the Client relationship beyond the contract:

* Under Promise/Over Deliver - Promise ABC to a Client and deliver ABCD
* Creating an environment of trust through transparency and flexibility
* Offer to help the Client in other areas like hosting/IM/maintenance services, etc.
* Leaving a Sense of Good Will - Close the project in a healthy manner, up to the standards/ expectations of the Client.

## Working with Direct Clients or 3rd Party Clients

For each Project we work on, the End Client could be of one out of the following two types:

### Direct Client

The Client with which we are working and communicating are the actual owners of the Website/Application. We call such Clients our Direct Clients because they directly come to us through our website, Relationship Manager or through our old Clients references.



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22vUiVGQMYGRFYUtxc6hWK%22%7D)

### 3rd Party Client

In many cases our Clients are actually web companies who take projects from their Clients under their brand name and then assign projects to us and we do the actual work for them. In such cases we serve our Clients (web companies) as a Vendor by developing the Website/Application for their End Clients (3rd Party Clients for us).

Following are some protocols that we follow while working with such Third Party Clients:

* Do not communicate directly with Third Party Clients (End Client) by any means (Email, voice etc...) unless it has been requested by our Client
* Do not use our Brand name (Rubico) on anything (email being sent from server, staging or production site, etc.) as these may be shared with Third Party Clients.
* Do not put any reference to Rubico in code anywhere



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22qJO_R5SWqIUeQuRJz7u9%22%7D)

### Don’t Leave a Digital Footprint when Working on 3rd Party Projects

Please check in the [Purple Book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.4ygwjmgrfpf3) for more details.

## Common Challenges

### Unresponsive Clients

If the Client is unresponsive and delaying the project timeline, then the project is at serious risk.

Follow the below steps:

1. **Empathize and Understand**
   1. Why is Client Delaying?: Talk with the Client and about what challenges they are facing in completing their tasks.. Tell them it’s delaying the timeline. Make sure they understand this.
   2. Switch Shoes: Try to think about what challenges Client might be facing. Listen to them carefully and try to think about a solution to their challenges. Talk to them about the pressures and constraints they are under. You’ll be more empathetic, you’ll have a better understanding of why they are perhaps not being as responsive as you’d like, and you may just learn some things that will help you add more value in the relationship.
2. **Plan A: Try to sort it out yourself.**
   1. Get a commitment. Agree with the Client on a specific date that Client will complete their task(s) and update that on the Master Doc’s Target Dates.
      1. For example: You asked Client to provide content, make sure you give them a due date on which they agreed upon to complete it. Send them a reminder and see if the plan works.
   2. If Client doesn’t meet the committed date, follow Plan B
3. **Plan B: Get OPPM and RM involved.**
   1. Notify the OPPM team by changing the color of the cell to Yellow (or Orange). The OPPM team may offer suggestions.
   2. Have a meeting with RM, explain to them the whole situation.
   3. Put the Project on Hold
   4. Send an email to RM telling the Client, we are putting the project on ON-HOLD until the Clientuntil Client has time to do their task(s). See [email sample](#_w7w8tid2x1fs)

### How Do You Deal with Multiple Product Owners (Point Person)?

It is very important to have only one point person in every project in order to avoid multiple requests from the Client. This cuts down the confusion of multiple experts with different expectations from the team. Scrum by definition states we should have ONE single Product Owner so there is a singular voice of priority from the Client end.

**As soon a PC finds out that there are multiple people participating as a Product Owner:**

1. **Empathize & Understand.**
   1. PC should report it as a major risk/challenge on the Master Project document.
   2. Schedule the meeting with the Product Owners to make them understand the need of single Product Owner
2. **Plan A: Try to sort it yourself.**
   1. Goal of the meeting:
      1. Tell the challenge, clarify the intent.
      2. Review the role of Product Owner with the Client. Why do we need a single voice? What we are trying to resolve.
   2. Once the Product Owner understands the WHY, they can help participate in solving it.
   3. Allow the Client to decide who that single Point of Contact (Product Owner) will be.
   4. If the Client changes the PO:
      1. PO is responsible for KT
      2. Client needs to provide additional cost to Rubico for KT time spent by Rubico Team.
   5. Agree in a written email with the Client about who is being chosen as a Product Owner.
   6. So, as a solution there is one person to work with the team, one person to prioritize requirements and play the End User Voice role. If the above plan doesn’t work, follow Plan B
3. **Plan B: Get OPPM and RM involved.**
   1. Notify the OPPM team by changing the color of the cell to yellow (or orange). The OPPM team may offer suggestions.
   2. Have a meeting with the RM (and invite Stan as Optional), explain to them the whole situation.

# Communication Protocols

## Client Friendly Name

Normally everyone needs a “Client friendly name” also referred to as an “Office Name”. Reasons for a Client Friendly name are:

* The Client can **understand** your name
* The Client can **pronounce** your name
* The Client can **remember** your name
* A Client friendly name will make it easier for you to build a trustworthy relationship with the Client.

## Profile Picture

A good profile picture is a way to make a good first impression. A smiling, happy face is always likable. Research says that a happy face increases the likability of the person even more. So please work with HR to make sure you have a happy, smiling profile picture for yourself.

Make sure you use the HR approved profile picture across:

* Google Workspace
* Email Signature
* Zoom (should be always logged in so your image is visible on zoom calls)
* Club
* Slack
* Github
* Gitea
* Invision
* Lucid Charts, Moqups
* Other PM systems ie Trello, Asana, JIRA etc (Create accounts using the Google Workspace official Rubico account)

Employees should login through Gmail accounts wherever it is allowed so that the system can pick up the Google Workspace profile picture. In case it does not then manually update the profile picture. Please upload the same picture everywhere.

## Google Workspace, Zoom & Other Profiles

Everyone should update their Google Workspace, Zoom and other tools (Club, plan.io, active collab, Basecamp, etc...) profiles with proper information:

* A professional photo, as shared by the HR team
* Use your Client Friendly Name (not your official Indian name)
  + Example: Steve Surya (not Surya Prakash)
* Google Voice USA phone number (if you have one)
* Mobile phone number
* Proper Local Time Zone
  + Delhi Time Zone IST (UTC/GMT +5:30 hours)

**Google Workspace, Zoom**

On the first day of joining, your Google Workspace and Zoom accounts will be set up via our admin control panel. Access to your accounts will be removed on a person’s last day.

Your Zoom name will be set up using your Client friendly name. Example: Steve.Surya (if it is available otherwise use Steve Surya or Surya.Steve, etc)

ATTENTION:

1. Zoom profile should have your Rubico email address and mobile number listed
2. Everyone should have their profile pictures updated on Zoom, Club, Google Docs, and any Client-end PM tools (Basecamp, Trello, etc).

## Brand Identity for Rubico

See the [Rubico Brand Guide](https://docs.google.com/presentation/d/1nafTR1cQATNcjUfVbPIS_AgEWQEgnkRlqmKXPNOGD0M/edit#slide=id.g2c2bd705891_0_0) for the correct usage of the logo, colors, style of imagery, iconography, typography, copywriting voice and tone, and illustration guidelines. The following are the requirements for the use of our brand names. Please use these exact formats (capitalization and spaces) when mentioning our company names (example Rubicotech is not proper).

| **Brand Name** | **Legal Company Name** | **Company Short Name** | **Domain Name** | **Website** |
| --- | --- | --- | --- | --- |
| Rubico | IT Hands, Inc dba Rubico Inc. | Rubico US | RubicoTech.com | [www.RubicoTech.com](http://www.rubicotech.com) |
| Rubico | Rubico IT Private Limited | Rubico IN | RubicoTech.in\* | [www.RubicoTech.in](http://www.rubicotech.in) \* |

\* RubicoTech.com will automatically redirect to RubicoTech.in if the visitor is located in India therefore it is acceptable to just advertise RubicoTech.com as our website.

## Domain Names for Rubico

**@RubicoTech.COM is used for**

* Non India Passport holders
* Rubico Inc Partners

**@RubicoTech.IN is used for**

* India Passport holders
* Contractors in India

### When to use RubicoTech.com and When to use RubicoTech.in?

By default put .com except in these cases:

* Rubico IT Private Limited’s website is RubicoTech.in and the India Gov’t has specific requirements for a company’s website. We should put .in on the official letterhead, official applications, online portals for the company and all administrative matters.
* When wanting to direct people to specific pages on RubicoTech.in (like <https://rubicotech.in/careers/>)
* When an .in email is listed next to the website it may be confusing to have the website be .com so it would be better to put .in which matches the email.

We should use .com everywhere else unless there is an exceptional case.

## Format of Email Names

Format of RubicoTech.COM and RubicoTech.IN Emails

| Format | First.Last@RubicoTech.com | Office.First@RubicoTech.in |
| --- | --- | --- |
| Example | Brandon.George@RubicoTech.com | Steve.Surya@RubicoTech.in |

Notes:

* Exceptions to this are stan@RubicoTech.com and matt@RubicoTech.com who are co-founders (and that was done before this protocol was defined!) or if the first name is already a client-friendly name

## Email Signatures

The photo signature is a great way to make your emails more personal. Please do not create your own email signature but follow the [instructions provided in EP portal](https://ep.rubico.tech/generate/email-signature). Please reach out to Claire Kanika (HDR) and Alexis Ankita (DDN) for assistance in case you face any issues with it.

## Email Groups

Email groups are listed on [Email Groups](https://docs.google.com/spreadsheets/d/1hojphaeNiqEThhPTyCRnLkj7wxG8XocIENVbj0Vr62c/edit#gid=0). If you see you are not properly assigned to a group, then please discuss this with [Server Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.jhy2kq62msj1).

## Slack

### About Slack

* Free Slack accounts have some limitations.
  + Slack does not allow mixing free and paid licenses in the same Workspace
  + The main limitation is that message history is capped at 90 days.
* Use the Slack app to easily manage communication in multiple Workspaces.
  + Slack also works in a web browser but you can only be in one Workspace at a time.
* Suggested Settings/Protocol
  + Do NOT use your personal Slack account.
  + You can create private channels to communicate with specific people
  + Make sure you select the private setting for any channel that you create.
  + Do Not share password credentials with anyone using Slack
* Recommended Applications to add
  + Google Calendar [simplifies the process of seeing your schedule, responding to invites and getting event updates]
  + Zoom [Simplifies the process of starting a zoom meeting directly from Slack]
  + Google Drive [Simplifies the process of searching and accessing Google Drive documents]
* "Reply to Thread" in Slack
  + The "Reply to Thread" option will send your message only to the person that the message is relevant for.
  + For important updates in a thread that need team-wide visibility, check the box “Also send to channel” when replying in a thread. This will ensure everyone is notified without cluttering the channel
  + If you see a conversation start in the main channel but could benefit from being in a thread, kindly remind the team to “Take this to a thread” to keep the channel organized.
  + Regularly check active threads in your channels to stay informed about ongoing discussions.

### Joining Process

* Each person creates a free Slack account associated with their Rubico email address. Note: the free account works exactly the same as the paid one (called “pro”) with the exception of some features.
* Each team member will receive an invitation from the [System Admin](https://docs.google.com/document/u/0/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit) to join the Rubico workspace. If you haven’t received one you may request the [System Admin](https://docs.google.com/document/u/0/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit) to invite you.
  + Workspace url: **rubicohq.slack.com**
* By default all Rubico team members will be part of the “**all-team**” channel; for Office/Team specific channels you will be added by an admin.

### Collaboration with Clients

#### **If the client has a paid Slack pro account**

* They can add you as a free guest in a maximum of one channel in their Workspace.
* If you need to be in more than one channel you would become a paid user on their account.
* If the Client is not willing to add you as a paid user in their account then you can create a Workspace to use with the Client.

#### **If the client does not have a Slack account**

* PCs will create their own workspace using RubicoTech.in account
* PCs may invite the Client to their newly created personal Workspace (not Rubico Workspace), and the Client will have to create a Slack account, the details will be in the invitation to join the workspace.
* PCs should inform the Client that they will receive/have received an invitation to join Slack, and if required, they should help the Client to join Slack.
* It is advisable for Clients to use their work related email address to be linked to the slack channel.

## Slack Workspaces

Rubico offices maintain two dedicated Slack workspaces based upon the offices [for HDR “rubico-hdr” and for DDN “rubico-ddn”]. To broadcast urgent messages to the entire team the ‘Announcements’ channels will be used. The purpose of these channels is to ensure that urgent information is communicated promptly, allowing team members to take necessary actions.

Only the [Network](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.rhv5mpsz5t8r), [Server](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.6b09ucdjdvxi), [Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.95spr9fj3s7j), and [HR](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.g548h3nwl908) teams are authorized to post messages in these workspaces. In case of questions, clarification, discussion etc, please respond to the relevant person through private messages or face-to-face communication.

## Zoom

The following team members are assigned a licensed Pro (paid) Zoom account:

* BD Team (Engagement Architects, SAs, RMs, etc.)
* Project Coordinators

Before the Meeting

**Meeting Setup:**

* Schedule: Include clear meeting title, date, time (with time zone), duration, and agenda (if applicable) in the invite.
* Join Info: Provide easy-to-find Zoom meeting link/ID, password (if enabled), and dial-in information (if needed).
* Preparation: Attach pre-reading materials or list preparation tasks in the invite.

**Your Appearance:**

* Background: Choose professional, neutral virtual backgrounds or tidy physical backgrounds. Avoid distractions.
* Lighting & Camera: Position camera at eye level with good lighting (natural or soft artificial). Consider "Touch up my appearance" for a polished look.
* Microphone & Audio: Adjust microphone volume for clear audio. Use "Original Sound" for important meetings (optional). Choose quiet environments.

**Preparation & Etiquette:**

* Profile Picture: Make sure your profile has a picture and is using a clear headshot with appropriate resolution. Use one of the headshots Rubico provides.

**Engagement during the Meeting:**

* Camera: Keep video on during the meeting, as it keeps you engaged in the conversation.
* Body Language: Maintain good posture, avoid leaning back, and keep hands visible for natural gestures.
* Communication: Speak clearly and avoid interrupting. Use chat or raise hand to ask questions.
* Professionalism: Maintain a professional tone throughout the meeting. Dress as you are expected to in the office. See Red Book: [Dress for Success](https://docs.google.com/document/d/1iwtWNOZ4rxKAftuPiAJC5A2wr7cPP_UqBG9vcDii0DU/edit#heading=h.jb2yvcagvvau)

**Sharing Your Screen:**

* Organize Desktop: Close unnecessary windows before sharing.
* Announce & Explain: Inform participants what you'll be sharing.
* Avoid Sensitive Information: Be cautious of what's displayed.
* Use Annotation Tools (if needed): Highlight key points during screen sharing.
* End Sharing: Stop sharing when finished presenting.

**After the Meeting**

**Recordings (if applicable):**

* Inform Participants: Get consent before recording.
* Privacy & Security: Download the stored recordings from zoom cloud storage and upload them in the project specific Google Drive folder responsibly.

**Notes:**

* Note Taking: Develop a system for capturing key points, decisions, and action items.
* Even if a meeting is being recorded, make sure you are keeping notes in a relevant document.
* Review & Revise: Review notes after the meeting to solidify key points.

**Additional Tips:**

* Personalize meeting invites with attendee names for better engagement.

### Meeting Info Details Process for Zoom

1. Each person creates a ‘Free’ Zoom account associated with their Rubico email address.
2. Basic Zoom accounts have some limitations. When there are more than 2 participants logged in from 2 different devices on the call then:
   * After 30 minutes a popup message is shown to all participants stating your meeting will end in 10 minutes
   * The meeting is automatically ended in 40 minutes (users, however, can click on the link again and it will start the meeting again)
   * Tip: Zoom calls with 2 people never end automatically.
3. Use the Google Calendar Addon (or the Chrome Browser Extension named Zoom Scheduler) to schedule the Zoom link on the calendar.
4. Suggested Settings/Protocol



1. Do NOT use your personal meeting room (because wrong people will join back to back meetings). Each Zoom meeting should have a unique ID.

### If You Don’t Have Zoom Pro Account

If you need a Pro account to schedule a meeting with a Client/Prospect you can do the following:

1. If someone with a Pro account will be on the call also, have them create the Zoom meeting (or ask one of the Pro account users if you can borrow it at that time).
2. Use your basic Zoom (beware, it will cut off after 40 min if you have more than 2 people connecting) and you will have to join the link again

## Communication Flow with Client

The PC is the primary communicator with the Client, but it is expected that the Tech Point, IM Specialist, Testers, and UI Designer will be communicating along with the PC. In some cases, the entire team is communicating both verbally and in written form with the Client.

### Verbal Communication

Verbal information should always be documented (either on Google doc or PM tool like Club, plan.io, etc...). It is the role of the PC to make sure that all verbal instructions/feedback is well documented and available to the proper team members at the proper time.

Client Meetings

* There are scheduled and unscheduled meetings. Normally there is a minimum of 1 scheduled meeting per week.
* Client and PC and/or TP can initiate a Slack message call if the context is quick and needs an immediate reply from either side.
* Who is Invited?
  + PC should be present at all Client meetings (except for meetings regarding MSA, or Billing, as the RM takes care of those topics.)
  + Relevant others should be present during the meeting during the relevant times of the meeting.
    - Tech Point / Tester
      * Sprint intro and delivery calls
      * Requirements analysis
      * If the call is regarding any outstanding immediate issues from the Client.
      * Sprint planning call with Client
    - Software Engineer(s)
      * In the relevant Client meetings, the development team should participate in the meeting so they can increase their knowledge about the project and understand the feedback well. For example in all Sprint meetings (Sprint Intro and Delivery calls) Development team should be present but they are not required on calls scheduled specifically for graphics or SEO work discussions.
    - SEO Team member should participate in the meeting:
      * If there is any specific task assigned to them, they would like to exchange updates and ask questions verbally to the Client.
      * If there is any specific recommendation by the SEO team for the Project that needs to be discussed with Client
    - UI UX Designer
      * If the agenda of the call includes
        + any discussion regarding CAQ
        + OR discussion/finalization for graphics, layouts (Homepage, Inner pages, etc...) and User Interface.
      * If the UI UX Designer has any specific question on project requirements which the PC does not know and that needs to be discussed with the Client.
    - RM should participate in meetings:
      * PC should schedule a meeting and invite RM to it if there is any outstanding issue or concern on the project where the team needs help from RM.
      * If the Client is not following/understanding his role and PC needs help from RM to communicate it to the Client
* Everyone who is attending a meeting should be introduced normally even if they are only listening.
* Recording Meetings?
  + The PC can record the call with the help of a software like Zoom (if a screen share + voice needs to be recorded).
  + PC should inform the Client ahead to take approval for such recordings.
  + The recording should be saved on the cloud. After the meeting PC needs to decide whether to keep it there or move it to the respective project folder on Google Drive.
  + Due to the storage limits on Zoom cloud, the meetings need to be removed from Zoom cloud on a regular basis.
  + The person who records the meeting (PC, BD etc.), needs to decide if the meeting is important for future reference and move the meeting to Google Drive accordingly (before deleting it from Zoom cloud).
* Meeting Notes
  + PC is responsible for taking all meeting notes
  + When Instruction is given verbally (try to motivate Client to provide written instruction on the PM tool--not so much verbally)
    - For Simple instructions, the PC should enter the info into the PM Tool and assign it to the Tech Point and Software Engineer.
    - For Complicated Instructions, PC should call a meeting with Tech Point & Software Engineer(s), PC should NOT communicate directly with Software Engineer(s) without the presence of Tech Point

### Written Communication

Info from Client:

* PC motivates the Client to provide all written information via the PM Tool (Google Doc, plan.io, Active Collab, etc...) When possible, the Client should be discouraged from using email or chat for sending instructions.
  + The team can post questions/comments on the PM Tool for Clients to improve understanding and, once the requirement is clear to them they can work on it. After completion of the work, the team will update the status on the PM Tool for the Client.
  + Client and PC and/or TP can initiate Slack, if the context is quick and needs an immediate reply from either side.
* Info received via email and Hangout: PC is responsible to record such communication in the PM Tool if it is of relevance to Team. PC should reply via the PM tool (not reply with the answers via the email) when possible.





[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22ULmfzz6k0dMydxHoCNjz%22%7D)

### Client Meetings Communication Flow

Everyone should talk with the Client directly in Meetings. Testers should understand all the functional requirements and ask questions based on that and Tech Points should also understand the functional requirements along with Technical requirements and clarify the technical questions for the team. If the team member has any questions they can also ask their question to the Client directly in the meetings. Every team member should demonstrate their work to the Client and deliver their part of the work.

**Everyone Communicates with Client During Client Meetings**



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%221h0im6uGsV3Yf7VGExj5%22%7D)

If the Team has any Questions/Challenges on the requirement or technology then it should first be discussed with the Tester and Tech Point. The PC is responsible for keeping the Team well-served and happy (not for requirements gathering). Testers and Tech Points should listen to the Team intently and should be able to answer most of their questions. The PC can organize a meeting with the Client for further clarification if needed.

**Internal Communication**

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[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22ooQCURPE5rH3H8hU6mX2%22%7D)

If the Tech Point is not able to answer the Team’s technical questions then everyone should go to the Tech Team. If that also does not work then everyone should go to the PC for help. The PC and Tech Point can then communicate with the Client in a proper way and using the proper channel, to get the desired information.

# Choosing the Communication Medium



**I need to communicate with a fellow team member, how do I decide which medium to use?**

Distractions often hinder a person’s ability to concentrate and do their work properly. We should all work together to minimize distractions in the office. Because chat messages “pop up” immediately, they can be very distracting and disturbing of a person’s concentration. Therefore only URGENT communication should be given over Slack. The table below prescribes the protocols in choosing which way to communicate with others in the office.

**When should you use Email?**

Rather than using email to collaborate or discuss topics, it is much more efficient and effective to use the PM tool or a Google doc. Email is for notifications, not collaboration. Send an Email if

* You want to notify others of about non-urgent but important information
* You do not need a reply in less than 4 hours

**When should you use Slack?**

Slack should only be used for time sensitive topics that are urgent and important. This way everyone understands that Slack messages should be reviewed in real-time and take priority over other communication sent via other mediums. Use Slack when your question or info is urgent and needs to be acted upon immediately.

**When should I use the PM Tool/Google Doc, etc?**

If the question or info is related to a project/task, add a comment at the relevant place like the Google Doc (SpecDoc, Master, etc.) or in the PM Tool.

The following table describes the best medium to use when communicating.

|  | **Email** | **Club/**  **PM Tool** | **Google Doc** | **Screen-**  **cast** | **Slack** | **Zoom/**  **Face to Face** |
| --- | --- | --- | --- | --- | --- | --- |
| **Broadcasting Info** | **✔** | **✔** | **✔** | **✔** | X | X |
| **Notifications** | **✔** | **✔** | **✔** | X | X | X |
| **Simple Instructions** | **✔** | **✔** | **✔** | **✔** | **✔** | X |
| **Introductions** | **✔** | X | X | X | X | **✔** |
| **Collaboration** | X | X | **✔** | X | X | **✔** |
| **Long Conversations** | X | X | X | X | X | **✔** |
| **Urgent Topics** | X | X | X | X | **✔** | **✔** |
| **Complex Topics/ Instructions** | X | X | **✔** | **✔** | X | **✔** |
| **Emotional Topics** | X | X | X | X | X | **✔** |

## Communicating Effectively

**Speak in English**

Practice makes perfect. Everyone is ***encouraged*** to speak English during all meetings including internal meetings (standups, etc). In order to help others improve their English and to better prepare to speak English to Clients, PCs are ***required*** to speak English during all meetings.

**Check Your Spelling!**

It is very important to not have spelling mistakes in any communication with Clients and especially in the deliverables! Americans believe that people who cannot spell are not educated people. *Americans highly value correct spelling.*

Clients expect us to correct their spelling mistakes before putting their content online. A Client expects us to correct their spelling (and grammar, capitalization, punctuation) without asking them for permission. It is wise however to inform the Client after you correct it.

**Common Differences in Indian and American English**

| **Indian English** | **American English** |
| --- | --- |
| Vocabulary Differences | |
| Doubt | Concern |
| Query | Question |
| Reply back/revert | Reply |
| Suggest me | Suggest |
| Club | Merge/Group |
| Spelling Differences | |
| Words have -our (favourite, colour) | Words have -or (favorite, color) |
| Words end with -ise (realise, finalise, organisation) | Words ending with -ize (realize, finalize, organization) |
| Grammar Differences | |
| Let’s meet tomorrow(Tuesday). | Let’s meet tomorrow (Tuesday).  [Add a space before a Parenthesis] |

For English punctuation rules refer to [this resource](https://apu.edu/live_data/files/288/basic_punctuation_rules.pdf).

**Naming Standards**

Please make sure to use proper naming of events, files, fields, databases, etc. All communication *(especially with Clients)* including emails, chat, shared docs, calendar, etc should have proper naming and spelling!

For example:

* If you are scheduling a meeting with a Client on Google calendar, name the title with the project name. For example: “Rubico - Anvoy- Review & Commit Meeting”
  + Name the calendar event or file in a way that is relevant to the point of view of the Client. Usually, that means to begin the name with “Rubico”
    - example: do not name a meeting with Granite as “Granite meeting” but rather “Rubico - Granite Startup meeting”
* Always follow the proper nomenclature while defining a field name in dB or an Image name.

**Email Communication**

* Define a proper subject for the email
* Communicate the Purpose
* Use proper grammar, punctuation, and spelling
* Use proper Signatures
* Keep Emails Short - do not intimidate recipients with too much text
* Properly Format Your Email Replies
* Compress/Optimize Files Before Sending Them
  + The recommended size for attachments is less than 2MB.
* **Take a 2nd Look Before You Send a Message!**

**Turn off Unnecessary Notifications!**

In order to reduce distractions and improve concentration, please turn them off:

* Unsubscribe to unnecessary newsletters, (for example Grammarly, etc.)

### Common USA Formatting

| **Topic** | **Format** | **Example** |
| --- | --- | --- |
| Date | MMMM DD, YYYY | October 15, 2022 |
|  | MM/DD/YYYY | 10/15/2022 |
| Social Security Number | ###-##-#### | 123-12-1234 |
| Address (one line) |  | John Doe, 1234 State St, Chicago, IL 60007-1234 |
| Address (multi-line) |  | John Doe  1234 State St,  Chicago, IL 60007-1234 |
| Zip Code (short) | ##### | 88310 |
| Zip Code (long) | #####-#### | 88310-7241 |
| Credit Card Info | ####-####-####-#### | 1234-5678-9012-3456 |

### TAT (Turn around Time)

**TAT** stands for Turn Around Time- best known as the time within which the specified query is agreed to be acknowledged/completed. It defines the two important parameters; Time and completion.

**TAT**– is a metric, which is usually associated with the ‘timeliness’ and ‘completeness’ measure. The calculation for TAT for a process is defined from the beginning (or first step) in the process to the end (or last step or deliverable) in the process. For example, if you measure the TAT for a general query or assistance, it is measured from the time the query was first received (or picked by the associate) until the query is acknowledged or resolved.

In Rubico we follow the TAT based on the parameters mentioned below for Teams engaged in a project:

* TAT when approached via Slack : immediately (within 1 hour)
* TAT when approached via email: within a business day
* TAT when approached via comments on google docs, Project Management Tool as soon as possible\*

\*when sending an Email or leaving a comment and the person requires immediate or a time bound response, they should communicate the TAT expected, or in the case of immediate action required, use Slack.

### Protocol for Content Approval Before Sharing it with Client

Normally the Client will be providing us content, but there are some cases where Clients expect us to provide (or at least recommend) content.



Examples of content include:

* SEO content including:
  + Page Titles
  + Meta Info
  + Keywords
* Social media posts
* Adwords content

When should content be reviewed by a person whose mother tongue is English?

* If the Client is overly sensitive and poor English could make a bad situation with our relationship.

**It is the responsibility of the PC to be proactive** and schedule a meeting with the RM for the project (or another first language English speaker) and have them review the content.

### Suggestions for Better Email Communication & Etiquette

1. **Understand the difference between “To” and “CC.”** The people you include in the “To” field should be the people you expect to read and respond to the message. The “CC” field should be used sparingly. You should only CC people who have a need to stay in the know.
2. **Keep messages brief and to the point.** Make your most important point first, then provide details if necessary. Make it clear at the beginning of the message why you are writing.
3. **Don’t discuss multiple subjects in a single message**. If you need to discuss more than one subject, send multiple emails. This makes it easy to scan subject lines later to find the message you need. It also contributes to briefer e-mail messages and a greater likelihood of a response. Also, the more specific you can be about your subject heading, the better.
4. **Reply in a timely manner**. E-mail doesn’t demand an instantaneous response. Responding once or twice a day is sufficient unless you are in sales, customer service, tech support, or some other field where a faster response is expected. Regardless, you must reply in a timely manner.
5. **Be mindful of your tone**. Unlike face-to-face meetings or even phone calls, those who read your email messages don’t have the benefit of your pitch, tone, inflection, or other non-verbal cues. As a result, you need to be careful about your tone. Sarcasm is especially dangerous. If something gets “lost in translation,” you risk offending the other party. The more matter-of-fact you can be, the better.
6. **Don’t use email to criticize others**. E-mail is a terrific way to commend someone or praise them. It is not an appropriate medium for criticism. Chances are, you will simply offend the other person, and they will miss your point. These kinds of conversations are usually better-handled face-to-face or, if necessary, over the phone.
7. **Don’t reply in anger.** In the heat of the moment, I have written some brilliant replies. I have said things in writing that I would never have the guts to say face-to-face. This is precisely why you should never ever fire off an email in anger. They almost never serve their purpose or your long-term interests. They burn up relationships faster than just about anything you can do.
8. **Don’t overuse “reply to all.”** This, of course, just adds more clutter to everyone’s already unwieldy inbox. Your default response should be to reply only to the sender. Before you reply to everyone, make sure that everyone needs to know.
9. **Don’t forward chain letters.** If you feel you absolutely must pass it on, please make sure that it is valid information.
10. **Don’t “copy up” as a means of coercion.** It’s one thing to copy someone’s boss as a courtesy. I do this whenever I am making an assignment to someone who is not a direct report.
11. **Don’t write in ALL CAPS.** This is the digital equivalent of shouting. Besides, ALL CAPS are harder to read.
12. **Don’t send or forward emails containing libelous, defamatory, offensive, racist or obscene remarks.** If you do so, you can put yourself or your company at risk. You could be sued for simply passing something along, even if you aren’t the original author.
13. **Remember that company email isn’t private.** You have no legal protection. Anyone with sufficient authority or access can monitor your conversations on company-owned servers.
14. **Use a signature with your contact information.** This is a courtesy for those receiving your messages. It also cuts down on email messages, since people don’t have to send a second or third email asking for your phone number or mailing address.
15. **Provide “if-then” options.** Provide options to avoid the back and forth of single option messages. For example, “I can meet at 10:00 a.m., 11:00 a.m. or 2:00 p.m. Will one of those times work? If not, would you please reply with three times that would work for you?”
16. **Use your spell-checker.** If I misspell words, use bad grammar or punctuation, then it reflects negatively on me and my company. That’s why God gave us spell-checkers. Make sure yours is turned on.
17. **Re-read your email before you send it.** It’s a good idea to re-read your messages and make sure that you are communicating clearly and observing good email etiquette.

Reference: <http://michaelhyatt.com/e-mail-etiquette-101.html>

# Collaboration Protocols

## Scheduling and Time Management

### Recommended Calendar Management

* Look at your Google calendar at least twice a day and accept or reject meeting invites as early as possible (not last minute).
* Show more than one timezone (Settings>Your current timezone:>Additional timezone)
  + Choose (GMT+5:30) India Standard Time
    - Label: India
  + Choose (GMT-4:00) Eastern Time
    - Label: EST
* Sync it with your smartphone
* Schedule all meetings on Google Calendar
* Schedule meetings immediately (do not tell people you will send an invite to them later).
* The modify calendar event feature should be enabled for one-on-one meetings:
  + This is a feature to facilitate collaboration, it is advisable to modify one on one events when the scheduled time and day conflict with another event and the other person’s availability.

#### **Calendar Sharing Matrix**

|  | **all@RubicoTech.in** | **PC@RubicoTech.in** | **OPPM@RubicoTech.in** | **BD@RubicoTech.in** | **HR@RubicoTech.in** |
| --- | --- | --- | --- | --- | --- |
| **Development Team**  **(SE, QA, UI/UX, Network/Server)** | free/busy | All Details | All Details | All Details | All Details |
| **PCs / Tech Team** | free/busy | free/busy | All Details | All Details | All Details |
| **Support Team**  **(BD, HR, Admin)** | free/busy | N/A | N/A | N/A | All Details |

Everyone in RubicoTech.com and RubicoTech.in should be able to see “free/busy” for each other.

### Conference Room Management

Watch the video for How to book a conference room?

| [RubicoTech.in](https://youtu.be/PhaQZ97Alf0) | [RubicoTech.com](https://youtu.be/Lx-6gDxE4aM) |
| --- | --- |

When to book a conference room?

* In case there is no need to use a presentation, we recommend you utilize common spaces.
* When to book the smaller CRs?
  + For 3 or fewer people
* When to use the bigger CRs?
  + Client calls
  + Require monitor
  + Require whiteboard
  + The team size is 4 or more
  + Interviews
* For standup meetings, please prefer common areas or a standing CR.
* CR can be booked for a maximum of 1.5 hours at a time.
* In case you no longer require the CR or the meeting is rescheduled, delete or modify the event.

When your meeting requires cross-office participation:

* The organizer must book the required CR in his/her office and
* Depending on the number of participants from the other office, the organizer should also book an appropriate CR from the other office.

\* Feel free to reach out to G-suite admins for any help.

### Vacation Management

#### **Vacation Responder**

When a person is going on leave then he/she must communicate with the Client ahead of time that he/she will be on leave. When possible, you should include bullet points of what is in progress so that your Client knows you’re on top of things – and it will also likely reduce the amount of emails sitting in your inbox when you return.

Anyone not expecting to be able to check emails regularly during a weekday (because of Holiday or leave) should put the Vacation Responder example:

| Thanks for your email. I will be out of the Office until **Monday, 20-Mar-2023**. If you need an immediate response, please email [**name@email.com**](mailto:name@email.com)otherwise I will respond to your email once I return.  -Your Name |
| --- |

Or if you are out because of a holiday you can put something like this:

| Thanks for your email. Our office here in India is closed on [Diwali](http://en.wikipedia.org/wiki/Diwali). I’ll be back online on **Monday, 20-Mar-2023**. If you need an immediate response, please email [**name@email.com**](mailto:name@email.com) otherwise I will respond to your email once I return.  -Your Name |
| --- |

#### **Delegating Responsibility**

Before a person goes on leave, it is important that they should delegate their responsibility to another capable and available person and should explain the work status. (The person who is taking responsibility should sign on the leave form only after they receive proper understanding of the work status. If the person is not able to sign the form, then they must send an email as proof that they accept the responsibility).

For a PC the responsible person should be the Tech Point and, on certain occasions, when another PC is available they can be made responsible to deal with the Client’s request. The Tech Point (or PC) will have to send an acknowledgment email to the Client and cc on the same email the relevant team member (e.g. Developers, SA or RM) that can then take the solution forward.

For Tech Points the responsible person should be the PC for the project. The PC will have to either connect with the Tech Point over phone or manage the request with the rest of the team. In case the requirement needs the involvement of the Tech Point for a dedicated time, the PC should request the allocation of a new Tech Point from the OPPM to solve the request.

**Example:**

| Thank you for your email. I have copied TechPoint/SA/RM - SAname in this email. They are able to move this forward until PCname is back in the office.  If there are any further challenges, please feel free to reach out to me and I will be happy to assist you further.  -Your Name |
| --- |

It is mandatory that you receive permission from the person to whom you are putting their name on your vacation message.

#### **Notifying Client of Vacation**

Before going on vacation for 2 days or more, a PC should notify all their active Clients **1 week before** by voice and in written form (on the Master Doc or an email).

Suggestions on sharing by voice:

* Share that you wanted to be proactive in letting them know that you will not be available starting next week.
* You can concisely share the reason for your absence (example: your relative is getting married, you are visiting a friend on the other side of India, etc...)
* Tell them the name of the person whom they can contact in your absence.
* Review with them the project tasks that are being worked on during your absence.
* Ask them if there is anything they are aware of that needs to be managed during your absence.

### Preparing Clients for Diwali & Holi

As part of our commitment to providing excellent customer service, Project Coordinators are required to proactively prepare clients ahead of the Holi/Diwali break, during which some team members may be on leave. At least two weeks before the holiday, all ongoing project timelines, deliverables, and potential impacts of reduced availability should be reviewed with clients. PCs should clearly communicate any anticipated delays and set expectations regarding response times. Additionally, clients should be informed of alternative contacts or escalation points for any urgent issues during this period. This preparation ensures that our clients remain informed and supported, mitigating any disruptions to project progress while respecting our team members' holiday schedules

### Scheduling Meetings

All meetings (both internal and external with Clients) should be scheduled using Google Calendar. Make guest(s) “optional” if they are not required by selecting the image to the left of their name (it turns gray color after selecting).

If you receive a meeting invitation, you should answer the request promptly by choosing:

* Yes
* Maybe
* No (Its recommended to add a note in case of ‘No’ so that the organizer can plan the next step if any)

Use the “**Find a time**” feature on Google Calendar to schedule a meeting at a time that is suitable for other invitees. You can see the availability of others on your same domain or whoever’s calendar is shared with you.

Attach relevant documents (like the Master doc) to all calendar events.

### Scheduling Meeting with Client

Every meeting you have with the Client should have an agenda point agreeing on the next meeting day/time. The PC, during the meeting, should ensure that the calendar shows the next agreed upon meeting.

#### **How Client Meetings should never go!**

[A Conference Call in Real Life](https://www.youtube.com/watch?v=DYu_bGbZiiQ)

#### **Deciding the Right Time for Client Meetings**

**Working Time for Americans**

8 am (or 9 am) USA time is the earliest that most Clients can do any conference calls. Depending on their [USA time zone](http://en.wikipedia.org/wiki/List_of_time_zones_by_U.S._state), morning is optimal for most Americans who are employees in a large company (who do not work from home). Traditional American business hours are 8am to 5pm, Monday through Friday. The actual time at work often varies as some employees like to come early and others prefer to stay late.

Sometimes Clients may work from home and be OK with calls or Zoom interactions in the evenings USA time (or in rare cases the early mornings), but that should only be done at their preference.

#### When emailing Clients, please include their local time as well as the Indian time. (If you are unsure, you can get their city location off their website or ask the RM). Most customers are not familiar with Indian time zones and it adds extra burden for them to figure it out. We want to make it very easy for new customers to adapt from working with all in-house developers (in their team) to working with the Rubico Team located in India.

#### **Daylight Saving Time**

Daylight saving time (DST) is the practice of advancing clocks so that evenings have more daylight and mornings have less. Typically clocks are adjusted forward one hour near the start of spring and are adjusted backward in autumn. In certain parts of the United States a one-hour shift occurs at 2am local time, in spring the clock jumps forward to 3am DST and that day has 23 hours, whereas in autumn the clock jumps backward to 1am standard time, repeating that hour, and that day has 25 hours. PC’s should check the meeting schedules with Client on the Start and End of DST and if needed the meeting schedules should be revised.

Following are the Start and End dates of DST. If you need more information visit

[Daylight saving time in the United States](http://en.wikipedia.org/wiki/Daylight_saving_time_in_the_United_States)

| Year | Date DST Begins | Date DST Ends |
| --- | --- | --- |
| 2023 | March 12 | November 5 |
| 2024 | March 10 | November 3 |
| 2025 | March 9 | November 2 |
| 2026 | March 8 | November 1 |

#### **USA Holidays**

How to add a US Holidays calendar from Google Workspace?

* Find it under Calendar Settings>Calendars>Go to “Other Calendars” section>Click on “Browse Interesting Calendars”>Subscribe for “US Holidays” Calendar

The following table are the main holidays in the USA where Clients normally would not be working nor want any meetings scheduled.

| **Holiday Name** | **Date** |
| --- | --- |
| [New Year's Day](http://en.wikipedia.org/wiki/New_Year%27s_Day) | 1-Jan |
| [Memorial Day](http://en.wikipedia.org/wiki/Memorial_Day) | Last Monday in May |
| [Independence Day](http://en.wikipedia.org/wiki/Independence_Day_(US)) | 4-Jul |
| [Labor Day](http://en.wikipedia.org/wiki/Labor_Day) | First Monday in September |
| [Thanksgiving Day](http://en.wikipedia.org/wiki/Thanksgiving_(United_States)) | Fourth Thursday in November, (normally no one works on Friday after Thanksgiving also.) |
| Christmas Eve | 24-Dec although not an official holiday in the USA, most Clients will not prefer to have any meetings. |
| [Christmas](http://en.wikipedia.org/wiki/Christmas) | 25-Dec  It is common that offices are closed between 25 Dec and New Year (from 25 Dec through 1st Jan) |

#### **Sending Email notifications for Calendar Requests**

* Do NOT send email notifications for Internal Meetings (only Rubico people are invited to meeting) unless:
  + You are suggesting a change to the meeting time by creating a Note or
  + Unless the meeting is scheduled within 24 hours.
* Do **send notifications** for meetings scheduled with the Client (Client may be using Outlook (or not a Google calendar) so they will require the notifications for the meeting to be put on their calendar. Always send notifications to persons who use Outlook for all changes to meetings)

#### **Request for Reschedule/Change the organizer**

When you receive a meeting invite that you would like to attend but are not available:

* You should Slack the organizer and request them to change the meeting time. Organizer can then either tell the person to decline the meeting or change the meeting to a more suitable time.
* If you are the organizer and won’t make it to the meeting:
  + Transfer the ownership of that particular meeting on Google Calendar to the person you are making responsible to chair the meeting.
  + Decline the meeting, if you are not attending. This is to prevent confusion.
  + If you also are attaching a Video Call details, change the meeting organizer. If the PC is the organizer. The PC should also share their host key with the assigned host. The host key can be found in the Profile menu, in the case of Pro Accounts, the meeting duration will not be limited to 40 minutes even if the prospective host is using a free Zoom account.
* Do NOT use the Note feature on Google calendar because
  + It is not easily visible to the other attendees.
  + Clients can read the notes and we don’t want anyone to write something like “I can’t attend because I’m busy in another Client meeting” which could be discouraging to a Client.

NOTE: If for some reason you have some urgent issue and you cannot attend the meeting for which you have accepted the request already, inform the meeting organizer (by Slack , phone or sms) in advance so that the rest of the team should not be kept waiting for you.

### Shipping Packages to/from India

Clients sometimes have devices or hardware they want to get to India so our delivery team can use it on their project. It is always best to have items carried to India by a visitor coming rather than to ship things internationally. Shipping things internationally is normally a hassle because they get tied up in Indian customs. Always consult with the RM before advising a client.

No package should be sent into India or out of India in the name of Rubico IT Private Limited. It is a complete hassle to work with the customs department. Any International shipping needs should be discussed with Stan prior to shipping.

| **No package should be sent into India or out of India in the name of Rubico IT Private Limited without approval from Stan.** |
| --- |

## Google Docs Protocol

### Project Folder Structure

Every PC is responsible for creating all the required documents for the project. PCs need to make sure they create a folder in Google Drive, Name it with the name of the project: “PROJECT NAME” and add all the docs inside that folder.

Make sure each project folder is shared with:

* RM of that project
* OPPM@rubicotech.in
* [shared@RubicoTech.in](mailto:shared@RubicoTech.com)

**Tips for sharing Project Docs with a Client**

* Do *not* share a *folder* with a Client as it is very easy to make mistakes (Client could access a file that is not ready for them to view yet).
* Only share *individual files* with a Client when you are ready for the Client to access it.
* PC is responsible for reviewing all docs before they are shared with a Client therefore only a PC should share a doc with the Client.

### Recommended Page Size for Google Docs

These can be changed by going to File > Page Setup

* Docs that are **printed**
  + in USA
    - Letter size with 1” margins
  + in India
    - A4 size with 1” margins
* Docs not printed (collaborative docs)
  + B4 size with 0.5” margins (because this size fits nicely on a screen with a 16 by 10 aspect ratio)

### Download Document Access

All sensitive documents/sheets should have both the options listed below “checked” This is to ensure confidentiality of the document is intact.

* Under Owner settings:
  + Select: Prevent editors from changing access and adding new people
  + Select: Disable options to download, print, and copy for commenters and viewers

## Sharing Client Comments

We would like to encourage the team to share good comments from Client with the rest of team members as it is a great encouragement for everybody but **please don't forward the original email or contact details from Client (just forward the part of email that is the good comment).** Often the Client email may contain lots of information about the Client and other conversations which are not related to the rest of the team.

**Please share the URL for your project**, so everyone gets a chance to look at a great work being done by a team.

The following is a sample email:

| To: | Relevant Team Members |
| --- | --- |
| From: | PC |
| CC: | RM |
| BCC: | [BD@RubicoTech.in](mailto:BD@RubicoTech.in)  [Haridwar@Rubicotech.in](mailto:Haridwar@Rubicotech.in) and/or [Dehradun@RubicoTech.in](http://rubicotech.in/Dehradun@RubicoTech.in) |
| Subject: | Happy Client Comment - [Project Name] |
| Body: | Hi All,  Please see below the happy Client comment from [Project Name]:  -----------------------------------------------------------  [paste the relevant portion of the communication from the Client]  -----------------------------------------------------------  The efforts our team has put in to deliver high-quality work for this project are commendable. Please join me in encouraging the team.  Regards, |

## Tools/Systems Accountability

| **System** | **Function** | **Responsible Person** |
| --- | --- | --- |
| Club (Active Collab)   * Daily Report | Internal collaboration tool (PM Tool - Project Management Tool) | Peter Ashok |
| Timesheet/TimeApp | Client review tool used to review billable time spent by team on the project | Brandon George |
| EP | Applying for Leaves, WFH | Hank Hemant |
| Google Workspace | Email, Drive, Calendar, Docs, etc (all linked to your Google account) | Brandon George (DDN)  Zach Vaibhav (HDR) |
| Slack | Chat | [System Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.kbo16pnz80dj) |
| Figma | Design & prototype for wireframes & mockups | Eric Shubhashis |
| Gitea | Code version management | Rex Rajat |
| PHPstorm | PHP IDE (Integrated development environment) | Luke Lokesh |
| Zoom | Voice meetings (Internal and with Clients) | Steve Surya (HDR) |
| Bugherd | It is free for users to report bugs but the paid version is required for people managing the bugs which have been submitted. https://bugherd.com/plans | [System Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.kbo16pnz80dj) |

## License/Services Purchase

In the event of requirements for purchasing licenses such as

* PHPStorm
* Adobe
* server-related services
* Co-Pilot
* Udemy
* etc

The Tech Team chair person should make this request on the Purchase and Approval Sheet, located in the '[USA tab](https://docs.google.com/spreadsheets/d/125wb0QAsVJBaKXFY-InrggVy412QoUIpxNz_ifTaZYc/edit#gid=1953727760)”, providing comprehensive information to minimize subsequent communication. Once the information is updated, kindly leave a comment for Brandon for approval.

## Recommended Chrome Extensions

The following are recommended extensions to add to Chrome browser.

* [Grammarly](https://chrome.google.com/webstore/detail/grammarly-for-chrome/kbfnbcaeplbcioakkpcpgfkobkghlhen?hl=en-GB)
* [Zoom Scheduler](https://chrome.google.com/webstore/detail/zoom-scheduler/kgjfgplpablkjnlkjmjdecgdpfankdle?hl=en-GB)
* [BuiltWith](https://chrome.google.com/webstore/detail/builtwith-technology-prof/dapjbgnjinbpoindlpdmhochffioedbn?hl=en-GB)

## Meetings Best Practices

To promote an optimization of time, PC should keep in mind the following best practices regarding meetings:

* Don’t have more than 2 meetings per day for a single project (maximum of 1 internal meeting (either Standup or Problem solving meeting) on the day of a Client meeting)
* PCs take care of Software Engineer’s time. PCs should schedule separate meetings with Clients for discussion of Non-Technical/Process related Topics (Don’t invite software engineers in those meetings). Should make Clients understand that Software Engineers' time is valuable.
* Software Engineers/QAs should be involved in meetings like: critical requirement gathering meetings, delivery meetings, progress demonstration/technical meetings, Go-Live events and stand up meetings.
* The PC has the discretion to approve or disapprove any leave that clashes with an event like this.

# Technical Topics

## Team Support



### 

#### **Computer Support**

If you are facing any problem regarding computer hardware, software, internet, etc then contact the [System Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.tnook9irtg0c), who will get back to you according to the priority level of your issue.

#### **Server Support**

If you are facing any problem regarding server maintenance etc then please contact the [Server Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.jhy2kq62msj1), who will get back to you according to the priority level of your issue.

#### **Maintenance Support**

If you are facing any problem regarding office maintenance etc then pleasecontact the [Office Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.swpv01j8jesm), who will get back to you according to the priority level of your issue.

## 

## Hosting

### Client Hosting

The Rubico team is happy to work with Clients to help manage code files deployment to hosting accounts owned by the Clients. We do not manage a hosting account which is owned by the Client. But we are happy to help with any issue on a time and material basis.

* Any hour spent by Rubico’s server team on working with Clients hosting accounts should be billed.

#### **Adding alerting email when using the client’s account**

When working with clients we work through their existing accounts a lot of the time. When operating out of a client’s account we want to add [alerts@RubicoTech.in](mailto:alerts@RubicoTech.in) as an alerting email address in the event of anything unexpected. The corresponding phone number is +91-7078707722 which is an HR phone in the HDR office. Below are the following accounts we would ask to be added to and the steps to do it.

##### **AWS**

In order to achieve this the Rubico alerting address (alerts@rubicotech.in) needs to be added to the security contact section under account in AWS. Follow the below steps to complete this.

* [Update the alternative contact in AWS](https://docs.aws.amazon.com/accounts/latest/reference/manage-acct-update-contact-alternate.html#:~:text=From%20AWS%20accounts%2C%20select%20the,an%20existing%20contact%20select%20Edit)

##### **Google Cloud**

* [Managing contacts for notifications](https://cloud.google.com/resource-manager/docs/managing-notification-contacts#essential-contacts-list-console)

##### **Digital Ocean**

* [How to create alerts](https://docs.digitalocean.com/products/uptime/how-to/create-alerts/#:~:text=Select%20where%20you%20want%20to,and%20hit%20Enter%20for%20each.)

##### **GitHub**

For Rubico’s interaction with clients GitHub accounts we want to be informed of any changes relating to the repositories that we are responsible for. In order to achieve this we must add the Rubico alerting email address ([alerts@rubicotech.in](mailto:alerts@rubicotech.in)) as the email notifier for the repo. Follow the steps below to complete this.

* [Adding an email for notifications on pushes to your repository](https://docs.github.com/en/repositories/managing-your-repositorys-settings-and-features/managing-repository-settings/about-email-notifications-for-pushes-to-your-repository)

In the event that Rubico is responsible for several repositories it may be easier to add the alerting email address ([alerts@rubicotech.in](mailto:alerts@rubicotech.in)) as a second account email. Follow the below steps to complete this.

* [Adding an email address to your GitHub account](https://docs.github.com/en/account-and-profile/setting-up-and-managing-your-personal-account-on-github/managing-email-preferences/adding-an-email-address-to-your-github-account)

Once active work on the project is done, we need to ask the client if he wants our email to remain in his account or not.

### Rubico Hosting WPEngine

Rubico has an account with WPEngine hosting server. We use WPEngine hosting to host WordPress websites. WPEngine provides managed hosting and provides us regular alerts in case a plugin has vulnerability issues.

* Rubico manages minor updates to website plugins as part of managed hosting.

### Rubico Hosting AWS

Rubico has 2 type of accounts for hosting websites (web applications) on AWS account and here are the main differences:

| Types of Server | Standard AWS hosting | Performance AWS hosting |
| --- | --- | --- |
| Database | MySQL on Ubuntu 22.04 LTS  AWS MySQL RDS Database | Amazon EC2 Instance  Aurora RDS DB |
| Security Services | Sucuri | Armor security ([www.armor.com](http://www.armor.com))  Sucuri |

The Rubico team takes care of software updates on our AWS servers on a regular basis.

**Note**: We do not encourage Clients to host with us. We host websites to support our development work. So in case a Client needs hosting, Rubico can help them. The cost of both servers varies; you can ask your SA to share details with you.

### Server Maintenance Communication Protocols

| Type of Maintenance | Development Team | SA/RM | Client |
| --- | --- | --- | --- |
| Gitea |  |  |  |
| Club |  |  |  |
| TimeSheet |  |  |  |
| Handshake |  |  |  |
| Server Maintenance |  |  |  |

Server Scheduled maintenance requires clear and prompt communication with Clients.

Once the PC receives the notification from the Network/Server Team that a Server is going into maintenance.

An email should be sent by the PC cc’ing: RM/SA [within the same day the PC is notified] to the Clients impacted by these updates/reboots to inform them that there may be a small amount of downtime due to routine server maintenance [[Sample Emails](https://docs.google.com/document/d/1HAUOvFj0e2cAiSx_3myJnH-3tyiNZ7H9yJCFhUrWD4g/edit#heading=h.xd6lflksilb4)].

## Login/Password Management

#### **Password Management**

1. Never write the word “password” but use abbreviations like “PW”, and use “UN” for username. Malware searches for the word “password” and “Username” so it can steal them.
2. Use [strong passwords](https://support.google.com/accounts/answer/32040)

#### **Where do I store the login Credentials?**

Rubico stores all credentials for applications, admin panels, plugins, builders, etc. required for the project in our Password Vault called [**Handshake App**](https://handshake.rubico.tech/pc/) and provides access to the specific email addresses that the user specifies (for Rubico team their official Rubicotech email id should be used). This application encrypts your username and password using a key that is unique to the user.

Follow the instructions on How to use it?

* For [PC](https://www.youtube.com/watch?v=WuIk5niTInY)
* For [Client](https://www.youtube.com/watch?v=AbTPU6f6e_w&feature=youtu.be)

### Don’t Share Logins (unless you have to!)

If the website or the third party account has the user management available, always use the user management to manage user logins with correct permissions for them.

For example, for the following use a different login than the one used by the Client (either have the Client create a fresh one for Rubico, or just create it by yourself if you have the necessary permissions):

* CMS (WordPress, Drupal, Joomla, Magento, etc)
* 3rd Party accounts
  + Domain registrar
  + Hosting
  + Plugins

There are cases where access can be delegated to our team members, PC should request the Client to delegate admin access to the official RubicoTech.in email addresses.

**PC/Tech Point/Developer:**

Email services, API Account access and any other third party application required in the development process.

**Network/Server Team/PC\*:**

DNS, Hosting and Email Services access

\*For Network/Server Team, the PC should always request delegation of admin access for two (2) team members.

#### **Shared Logins**

If you have to share a login then put it on one of the following:

* Project specific related:
  + Share the credentials using [Handshake App](https://handshake.rubico.tech/pc/)
* If not project specific related:
  + [Rubico Account info sheet](https://docs.google.com/spreadsheets/d/1KXAzTsgxieNcp60yy1DTJsmYHisu_RRVDlX3Z5IFQtI/edit#gid=0) (if it needs to be shared with other PCs)
  + [Rubico Test Account info sheet](https://docs.google.com/spreadsheets/d/1_aXPerBI4he1xckQxRSLGKNlWcbi31Lqc5-_zxJMS-8/edit#gid=259436681) (if it needs to be shared with anyone within Rubico)
  + [Internet Marketing Google Analytics, Webmaster & Gmail Sheet](https://docs.google.com/a/rubicoit.com/spreadsheets/d/1C9SSs8XDaRknrjw0lSC2tzcDAL1x7EUtqee5TzLSy_I/edit?usp=sharing_eixpa_np&ts=58241af7) (if it needs to be shared with IM Team)
  + [Domain Admin](https://docs.google.com/spreadsheets/d/19mlTurAcHf0m2ChxDbVN79_iK_xYt4EhkTcKS1w5nKQ/edit#gid=10) (if it needs to be shared with the Server team. This contains secure account information)

### Passwords and Email Account

You should never ask for another person’s password for their email account. If for some reason you require access to a particular domain’s email account, request that a new email account is created. We should not know the password for any email account that is not a ‘general’ account created for a specific purpose.

### Admin Logins and Rights

CMS (like WordPress, Drupal, Joomla) have the ability to create Users including Admin Users. We should NOT share our admin login/password with the Client but instead create another user account with their email address.

## Storing Information

Our office computers are not backed up individually. Information which we create and use must be stored somewhere other than just our computers. There are broadly two places we typically store information: Git and Google Drive.

### Git

Software that is under development should be stored in Git. Please refer to the [Purple book](https://docs.google.com/document/d/1P_HDHwH5jFwf1-Oqv_q1So33LpBv8uUYt-Y6hBRSSN0/edit?ts=598d7dbf#heading=h.ihi7zq4yzk0) for information on using Git.

### Google Drive

Documents and other files that are important should be stored in Google Drive. Storing non-Google docs/sheets/slides in Google Drive takes up space, so try to keep your files in the native Google docs/sheets/slides format whenever possible.

### Exceptionally Large Files

For storing very large files, each office also has a Network Attached Storage device (NAS). Please contact the [network team](mailto:network@RubicoTech.in) if you need to store large files.

## Code Management

**How to manage code when the repository belongs to the Client?**

In case the repository has been provided by the Client, PC should create a repository internally and make sure we are having the code pushed first to the Rubico’s repository and then to the Client’s repository.

**Should we give access to Rubico’s repository to the Client?**

If the Client asks for access to our gitea repository, the PC should first check with the RM and get approval.

**When to share the code with the Client?**  
The right time to share the code with the Client is usually at the end of the completion of the project phase.

PC should always consult with the RM once before providing access to the code to the Client. It is then the RM’s responsibility to review the invoices and then to convey to the Client and PC both about the status of code sharing and mention blockers if any.

## Device Management

#### **HDR**

Each device will have a device holder ([desk stand](https://www.amazon.in/ELV-PS2-Mobile-Stand-Black/dp/B0762JYGDP/ref=sr_1_6?dchild=1&keywords=tablet+phone+desk+stand&qid=1613561445&sr=8-6)), and charger, and together these items are assigned to a responsible person who will keep the devices on their desk. The device holder should be permanently placed on the device station and labeled with the exact name of the device. Also, each device holder has a PVC card fixed on it which is used by the team to write their name.

Whenever a resource requires a device from the device station, that resource has to update his/her name (e.g. **ARLAN** ) on the PVC card before taking the device, and use the marker pen which is always present near the device station to write the name. if a marker pen is not present then the person taking the device can connect to the [Office Assistant](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit) and ask for the marker pen. DO NOT USE a permanent marker. Once the task is done the resource has to erase his/her name from the PVC card and put back the device and connect it to the charger.

**Take Device at Home**

If someone needs devices for home (testing/development purpose), they need to send an email to the PC of the project, a member of the network team and Kevin/Paul (admin). The email must include the device name, and the project name, and number of days if more than 1 day is required. After informing the team resource has to write his/her name on the PVC card (e.g **ARLAN - Home**).

Further, the resource must send an email upon the device’s return on the day of submission of the device to the office. And then the resource has to erase his/her name from the PVC card, put back the device and connect it to the charger.

#### **DDN**

All the devices are kept on the charging station and labels are there on the charging station for each device. Each device should be placed in its specific place as per the label on the charging station. The charging cables for the devices are well installed behind the charging station with proper power supply. Team members are advised not to remove the cables from the charging station. We also have separate individual cables for both Android and IOS, which can be used by the team members whenever they require them for debugging purposes on mobile devices.

If any team member requires any of the devices, they simply have to mention their name on the charging station on the specific position of the device as per the label on the charging station. Once their work is complete with the device the team members have to put the device on the charging station on the position as per the label of the device. Also they have to put the device on charging whenever they put back the device on the charging station after completing their task.

If any of the team members requires cable for debugging purposes they should reach out to the responsible person of the cables and ask for the cable and register their name in the register created specifically for this purpose. Whenever they return the cable they can strike out their name from the register.

**Take Device Home**If someone needs devices for home (testing/development purpose), they need to send an email to the PC of the project, a member of the network team and Saahil Joshua/Seth Simarpreet (admin). The email must include the device name and the project name and number of days if more than 1 day is required.

Further, the resource must send an email upon the device’s return on the day of submission of the device to the office.

## File Backups

### UI UX Team files

A complete guide to the design process and asset management for all design files can be found [here](https://docs.google.com/document/d/1GAYlKWQQ8-A8IoOAWa84BbJs0bOqX2c1Ip3KNuiOLKI/edit#heading=h.8fwitslgl1k2).

## Accounts Receivable

* The RM is responsible for Accounts Receivable.
* The RM will communicate with PC and Client in case the project needs to be put on hold due to lack of payment.
* The PC has no responsibility in collections.

There might be many reasons when the Client delays or stops the payments. Here are some of the steps we can take to manage this scenario:

1. We can take additional deposits from the Client
2. Collect an estimated one month worth of billing as a refundable deposit.
   1. To understand how it works go to the [Managing the Deposit](#_w0ztzqwgt1sy) section.

## Compliance

### Compliance Point Person

Steve Surya is the point person for Rubico that should be brought into the project when a Client requires any Compliance. Surya will:

* Consult with team and Client
* Define what Rubico will and will not do.
* Recommend 3rd parties to be hired when relevant.
* Audit
* etc...

### GDPR

**General Data Protection Regulation**

* GDPR is a regulation that requires businesses to protect the personal data and privacy of EU citizens.
* Does GDPR apply to my business?
  + If you are a U.S. based company:
    - Doing business and marketing in the U.S. only – it means nothing.
    - Do business in the EU or collect data from residents of the EU, you are subject to these regulations. Any third party services you use to collect and store data are also subject to these regulations.
* If the GDPR applies to your business, make sure you:
  + Have accessible **privacy policy** that informs users how collected data will be stored and used
  + Have a **means for users to request access and view the data** you have collected on them
  + **Provide users with a way to withdraw consent** and purge personal data collected on them

How to Implement

* Review the [Purple book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.4ygwjmgrfpf3) for more information on how to implement GDPR compliances

### ADA

**Americans with Disabilities Act**

* ADA sets the standard for accessibility, which defines all electronic and IT including websites must be easily accessible to the people with disabilities

When is ADA compliance required?

* ADA compliance is required for the website if the website is to be accessible by people with disabilities.
* Most state governments and some private organizations may ask their website to be accessible for people with disabilities.
* Rubico asks the Client during startup meetings (or other ways) if they need help with ADA. Based on the Client’s requirement, Rubico team may implement the ADA compliance with the website.

How does Rubico comply with the ADA?

* Follow the [Purple Book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.pj27dnyf31wg) for more details on how Rubico comply with ADA

### PCI

**Payment Card Industry**

* Provides a set of security guidelines to protect customers credit card and payment information. **Rubico does not store or transmit any credit/debit card data on our servers** so we should never fall under this compliance.

If a Client asks for managing payment transactions, there are ways to manage it without storing or transmitting data from our hosting accounts. See the [Purple book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.xhybxsodp10x) for more details about these mechanisms.

We also have a test credit card found in the [Test Credit Card - Google Sheet](https://docs.google.com/spreadsheets/d/1KtE1Wd03kFb0QzaHINzxKrGOUnGS0aqks7N7042Hr-M/edit#gid=0) which PCs have access to and can be used to test transactions on a payment gateway implementation.

### HIPAA

**Health Insurance Portability and Accountability Act**

* HIPAA sets the standard for sensitive patient data protection
* Any company which deals with storing or accessing the (medical) patient information comes under HIPAA compliance.
  + Anyone who has access to patient information and provides support in treatment, payment, or operations

How does Rubico support HIPAA?

1. Rubico DOES NOT PROVIDE HIPAA COMPLIANT HOSTING
2. Rubico can help developing a website which needs HIPAA Compliance
   1. We can follow best practices to set the standards for HIPAA Compliance
   2. These standards include working on the application side as well as on the server side
      1. Rubico takes the lead on managing compliance on application side
      2. The hosting provider needs to set standards to be HIPAA compliant
   3. Follow the [Purple Book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.4ygwjmgrfpf3) to know more about HIPAA development standards

### COPPA

**Children’s Online Privacy Protection Act**

* When it comes to the collection of personal information from children under 13, this act puts parents in control.
* COPPA defines guidelines on how to protect children's information while collecting data on any online service including websites, mobile apps etc.
* The following information is considered as ‘Personal Information’ under COPPA:
  + Email address
  + First and last names
  + Screen names
  + Geolocation
  + Instant message details
  + Physical address
  + Telephone number
  + Hobbies/interests
  + Photographs
  + Video and audio files

How does Rubico supports COPPA?

* Review the [Purple book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.4ygwjmgrfpf3) to see how Rubico complies with COPPA implementation

### FERPA

**Family Educational Rights and Privacy Act (FERPA)**

* This act contains a set of standards in place to help protect the personal information of students and their families. It applies mainly to educational organizations that receive certain kinds of funding from the U.S. Department of Education.

How does Rubico support FERPA?

* Review the [Purple book](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.4ygwjmgrfpf3) to see how does Rubico comply with FERPA implementation

## Data Privacy and Security

### Data Security

Rubico agrees to abide by and maintain adequate data security measures, consistent with industry standards and technology best practices, to protect data from unauthorized disclosure or acquisition by an unauthorized person.

### Data Breach

If any employee reasonably suspects and/or becomes aware of a disclosure or security breach concerning any Data it must immediately be reported to OPPM, the RM and the [Finance Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.swpv01j8jesm). It is important that any data privacy concerns be addressed as quickly as possible.

## Software Development

### Tech Point’s Responsibilities

Project Ownership

* **Equally cheers the project success with the PC as well as being responsible for the failure**
* Tech Point, along with the PC and Tester, gather the requirements and **stages the project**
* In the absence of a PC, the Tech Point handles the project and **keeps hold of the project until the PC is back**

Technical Leadership

* Responsible for **understanding the project technically**
* **Explains the technical aspects to the team** and makes sure the development team understands the expectations
* Responsible for creating, updating the technical aspects of the **Project SpecDoc and other relevant documents** along with the PC
* Identifies the technical limitations, hurdles and **proactively communicate** them to the PC and Client and troubleshoot issues with the team
* Provides **solutions** to technical issues
* Reviews **Version Control- Git/SVN** and keep the team accountable to update/commit their files
* Manages **CMS upgrades** of relevant current or old projects

Client Interaction

* Discusses **technical questions** with Client during meetings
* Provides **demonstration** to Client in delivery meetings and deliver tasks to Client effectively
* Handles full project **communication** in the absence of PC

Consulting

* **Consults with PC and team** about all the aspects of the project
* Offers **technical solutions effectively to the team,** discuss them in a team meeting
* Consults with PC about the project requirement challenge/concern
* **Encourages other team members** to ask questions to the Client

### Understanding Client’s Perspective - a Key to Success

#### How Projects should NEVER Go…

[Check out this link and learn!](#_2q05x3brtbjh)

#### Quotes and Reflections from actual Western Clients working with Indian Software Companies

**Quality Control/Testing**

* “They invested more time in trying to reproduce the problem than in ‘just fixing it’.”
* “It appears testing is non-existent.”
* “The team came back to me three times telling me it was fixed, and it wasn't fixed. Then finally they did fix it. Frustrating minor things like this happen all the time.”
* “John worked all weekend combing over the site and still found 300 items that needed fixed and most of them should have been caught in a routine quality control check”
* “Code from India can be truly awful if you work with most companies. A lot of them treat programming as a task to be completed with numbers and fire those that can't work fast enough, rather than a task requiring quality where people are educated to avoid mistakes and fired only as a last resort.”

**Communication**

* “She tried explaining multiple times in multiple ways and finally gave up.”
* "It would be too painful babysitting and repeatedly explaining and correcting...we decided to do it in-house."
* “Of course it is impossible to fully stereotype 1.2 billion people, but many Indian people do not write much down. This leads you to constantly revisit the same issues. You may get frustrated repeating the same thing again and again. Couple this with the time difference and right there you have a major challenge on your hands.”
* “Mix working remotely with time zone differences, add some cultural differences and you can see how outsourcing can go from helping your business to eating up all of your available time, energy and maybe even money.”

**Ownership**

* “I would like to see the team take some initiative and ownership of the product.”
* “I would think they consider me as a Client and not the quality check person.”
* “Please do not ask for permission to fix this issue that I just reported to you. When you know there is a problem--just fix it, don’t wait to ask me if you should fix it or not!”
* Kathy expected the Indian team to be more consultative rather than expecting her to do the required research herself. “I’m hiring you to save me time!”
* “Indian developers seem content in what most here would consider a chaotic, stagnant project. This may be due to the fact that they are under 28 and barely comprehend the big picture of what is happening. They have no clue what the big picture goal is. It is not easy to be motivated when you do not really comprehend why you are doing something. You will have to constantly monitor/manage your project to avoid having your project become another casualty.”

### Scrum the Rubico Way

The [Scrum Process](https://docs.google.com/a/ithands.com/document/d/1qqHhpPWRZjQFaxs5oXIV_fpjN5ieO-nF-RlmhwlPo40/edit) document is the default way that Rubico does Sprints. [Project Scrum Template](https://docs.google.com/spreadsheets/d/1PHIz74Nx0Kvdv2lFUAsquijDMdnPjSHcUdsH4EdlXKM/edit#gid=774014737) for creating User Stories and managing Sprints.

### Issues and Bug Management

Rubico protocols, procedures and assumptions when dealing with issues and quality assurance is found in this document: [Issues and Bug Management](https://docs.google.com/a/ithands.com/document/d/15NPrTC4I8v8-8u4vuH7K0HliIDVVwI2tpORtTd3Qy3A/edit#heading=h.px3nsyoqfv1m). This doc can be shared with the Client when appropriate.

## Digital Marketing

The [Bronze Book](https://docs.google.com/document/d/1Q7M_Ixrz_pZrj6aSIc5FGcL15IyoM4lgBPvLLF9Caxw/edit) explains our Digital Marketing process. PCs should review the [Bronze Book](https://docs.google.com/document/d/1Q7M_Ixrz_pZrj6aSIc5FGcL15IyoM4lgBPvLLF9Caxw/edit) and learn the basics of Digital Marketing so they can do the following:

* Upsell Digital Marketing services to the Client - Observe needs that the Client may have and offer our team to work with them.
* Get SEO technically done correctly - Include Digital Marketing Specialists into your projects when relevant

### Roles and Responsibilities: PC and MPC

As always, there will always only be one Project Coordinator assigned to a single client. If there is development work then the PC is in India. If there is no development work then the PC is in the USA and referred to as the Marketing PC.

| **Project Coordinator (PC in India)**  Main point of contact (for both marketing and development communications) when engaging in development work at all with client. | OR | **Marketing Project Coordinator (MPC in USA)**  Main point of contact when engaging in ONLY marketing work with clients.   * Can relay tasks to PC in India if development implementation is needed for marketing work. |
| --- | --- | --- |

If regular development work begins at any time, the MPC must relinquish all PC responsibilities to the PC in India. This means…

* The new PC will create a new Master Doc (with a link to old Master Doc so it is easy to find it).
* The PC in India will chair the weekly meeting with the Client.
* Any direct communication to/from the MPC and Client must be visible to the PC in India.

## Information Flow in the Organization:



[Flowchart Edit](https://app.diagrams.net/?libs=general;basic;arrows&mode=google#G1HkkYedtMVbtuQa3h12kbCmBSVGM7HAox#%7B%22pageId%22%3A%22WSqEHWaILiA_bik7SnXd%22%7D)

For more information, please refer to this document - [Rubico - Data uniformity](https://docs.google.com/document/d/1VoYCRGlEXLQsOfbBgRlbGEaNbRi8OuuQx7o6x8KZ8yA/edit#)

# Workforce Management

## Allocated Resources (AR) and FTE

**Staff Augmentation** is the strategy of allocating full time (or half time) dedicated technical resources as development extensions of a Client’s in-house team on a monthly fixed cost.

**Allocated Resources** (AR) are those provided to a Client needing staff augmentation. ARs are dedicated, committed resources to a particular Client. The Client manages the allocated employees and is responsible for providing them proper workload (either full-time or half-time), training, mentoring, etc just as they would a regular in-house employee.

**FTE** (Full Time Equivalents) refers to a bucket of hours (80, 160, 240, or 360 hours per month) a Client is agreeing to pay for particular skill sets to be available to them in real-time. The Client is not so particular in the person(s) who are working on their project as much as the tasks to be completed properly and efficiently.

|  | **Allocated Resources (AR)** | **FTE** |
| --- | --- | --- |
| **Team members** | Fixed  (individual persons are allocated 4 hours or 8 hours per day) | Changes  (team members may change depending on the skill set required to do the tasks) |
| **Engagement with Client** | Treated like an in-house employee | Treated as an independent contractor |
| **Management** | Client assigns tasks to individuals | Rubico assigns tasks to individuals |
| **Continued Training of the Employee** | Client’s responsibility | Rubico responsibility |
| **Typical Project Types** | Large complex projects | Smaller projects but in larger quantity |
| **Billing** | Billed per person  (each person is full time or half time) | Billed per hour  (with a minimum amount of hours of 80, 160, 240, or 360 per month)c |

### Allocated Resources (AR) FAQs

**How do we bill ARs?**

* **Basis:** We bill for ARs by day (full or half).
* **Leave:** Billing is not reduced for planned leave (up to 2 days/month).

**Do we reduce billing when an AR is on leave?**

* **Coverage:** Substitute AR, additional output (testing, design, etc.), or work catch-up next month.
* **Planned Leave:** Ensure pending work is explained to another team member for smooth workflow.
* **Unplanned Leave:** Don't bill for substitute time (testing, project management, etc.).

**Is an AR ever expected to work on Saturdays and join Rubico events?**

* **Saturdays:** ARs may work Saturdays to meet deadlines or attend mandatory Rubico events (CMS updates, project estimations, etc.).
* **Benefits:** Participation in Rubico events fosters growth and ultimately benefits clients.
* **Client Communication:** ARs should inform clients about Rubico events and their value for the project.

**How to manage expectations on previous projects an AR was involved in and work keeps coming?**

* **Small Tasks:** ARs can handle small requests from past clients, potentially requiring weekend/extended hours.
* **Large Tasks:** ARs should perform knowledge transfer and act as a mentor/consultant to a new resource.

**Does my scope of learning get limited if I am an AR, as my scope is limited to one Client, project and framework?**

* **Personal Development:** ARs are encouraged to dedicate time (a few hours/week) to learn new technologies.
* **Client Consulting:** ARs can recommend new technologies to improve project efficiency, but discussions with PC and team are required before client interaction.
* **Variety:** ARs seeking exposure to different technologies/clients can request a half-time AR role (discuss with PC & RM).

**How can an AR justify 8 hours of productivity, when the actual productive hours are around 6-7 hours in a day?**

* **Expectation:** ARs are expected to deliver full-time equivalent output.
* **Individual Efficiency:** Some ARs deliver full output in 6-7 hours due to experience, while others may require 10+ hours.
* **Deliverables:** **Accepting and meeting deadlines for assigned tasks is crucial; work the necessary hours to deliver on time.**

### AR FAQs (Extended Version)

* How do we bill ARs?
  1. We bill on days basis for each AR, you could have Full Day or Half a Day
* Do we reduce billing when an AR is on leave?
  1. No. The AR on average should be providing 160 hours per month of output which is approximately 20 working days. In the average month there are 22 working days, if an AR is not able to provide ~160 hours of output then the following strategy can be done to fill in the gap:
     1. Provide a similarly competent and capable **substitute** to do the ARs work in their absence
     2. Fill in the missing output by providing **other output** (like testing, graphic design, IM, etc)
* What happens when an AR is on Leave for more than 2 days per month?
  1. The AR can make up for missing output the next month.

or

* 1. **Provide a substitute person**: The PC needs to ensure that any pending work is explained to some other team member, before the person goes on a planned leave. This way we can ensure the workflow is not hampered and pending work does not pile up.

or

* 1. **Provide other Output**: Don’t bill for other’s time (like Tester’s, project management, UI UX, etc)
  2. Credit the day(s) the
* Is an AR ever expected to work on Saturdays?
  1. Yes, like all Rubico employees, an AR is expected to work on Saturdays when required to meet project deadlines and attend Rubico events.
* Are the ARs expected to participate in Rubico events like: CMS update/upgrade, Git review, SpecDoc, project estimations, company meetings, etc.?
  1. ARs like all Rubico employees are expected to participate in all mandatory Rubico events as they are important for a person’s growth and professional development. What helps a Rubico employee will help the Clients in the long run.
  2. The AR should inform the Client when a Rubico event is scheduled and let the Client know how it will help the person grow and therefore the Client is benefited.
* How to manage expectations on previous projects an AR was involved in and work keeps coming?
  1. Sometimes tasks do come in from Clients we have worked with. There are 2 ways to handle the situation:
     1. **Approach 1 if tasks are less** - The AR can spare some time and get the tasks done. In certain cases it may require the AR to work on Saturday or stay late/come in early.
     2. **Approach 2 if tasks are more** - The AR will do Knowledge Transfer (KT) to another person and the AR acts as a consultant/guide/mentor to the new resource.
* Does my scope of learning get limited if I am an AR, as my scope is limited to one Client, project and framework?
  1. Team members should devote some time to learning and set aside a few hours of the week to learn a new technology or advancements in the same domain. This will keep them abreast with the changing technology world. Being an AR actually helps to carve time out for real learning and implement the same in projects for betterment, taking into confidence the Client.
  2. ARs are expected to be consulting the Client and others in areas that can be improved by applying new technology and methods to achieve better effectiveness and efficiency.
     1. Note: Discuss your consultation first with the PC and team, before discussing with Client directly.
  3. If an AR is getting bored and desires to get exposure to a different type of technology or Client, then a request can be made to be changed to a half time AR to the PC and RM.
* How can an AR justify 8 hours of productivity, when the actual productive hours are around 6-7 hours in a day?
  1. An AR is expected to give output equal to a full time person. Some people are able to give full time output within 6-7 hours because they are experienced and work very fast. Others have to work 10+ hours per day in order to provide full time output because they lack experience and skill.
  2. Throughout the project ARs are accepting tasks and making commitments on when they will deliver the tasks completed. It is important that ARs keep their commitments and work however many hours are necessary to deliver their tasks on time.

## USA Team Management

If a project requires a USA team member to be engaged (Marketing, Product Manager, etc.) the Project coordinator should request the creation of a project on Club under the name [Client Name] - [Project Name] - US, this is where the USA Team member will log their hours.

Hours logged by anyone in the US will be logged in a separate Club project than the hours logged by anyone in India, for billing purposes. The current PC will be in charge of monitoring and submitting those hours every month for both US and India.

If one-time work is required by a USA employee, the rate difference will be communicated by the RM to the Client (either by MSA, email) and the current PC must create a separate Club project for any US hours to be billed.

## Knowledge Transfer (KT)

During the life cycle of a project or the relationship with a Client, there might be a need to transfer knowledge of existing roles and responsibilities. Here are the protocols that you should consider:

* When the person is leaving Rubico use the following template:
  + [Employee Knowledge Transfer (KT) TEMPLATE](https://docs.google.com/document/d/1XgyHhIpTOAY2oeksNZgabkTt4x0VtBXyEE_sC-vjzVY/edit)

### Knowledge Transfer between Project Coordinators

Use this [document](https://docs.google.com/document/d/14s9cxEjF18iOYK9Gw6VchCDInI2Go4K7Iccpa1QCVTw/edit)

* **The new PC should update the Master Doc for any Client (Active or Inactive):**
  + **The new PC should create a new Master Doc and rename the old Master Doc by adding [As of “DATE” ]**
  + **Link this old Master Doc at the end of the newly created Master Doc**

Changing a PC on a project very much creates a risk to the project, especially when there is a change of Project Coordinator. Changes to a Project Coordinator can happen for several reasons including:

* PC is no longer available to work on the project.
* Project has reached a milestone and is going into maintenance mode where a different PC can take over the project.
* Client has requested a change in the PC.

A key task for doing a successful transition is to transfer all knowledge to the new PC. The [KT: Project Template](https://docs.google.com/document/d/14s9cxEjF18iOYK9Gw6VchCDInI2Go4K7Iccpa1QCVTw/edit#) is used to help in a smooth transition.

### Knowledge Transfer between Software Engineers

This knowledge transfer document has to be created and used whenever any employee is leaving the company. This document will be created by the Project Coordinator/HR. This is the template: [**Master KT: Employee**](https://docs.google.com/a/ithands.com/document/d/1XgyHhIpTOAY2oeksNZgabkTt4x0VtBXyEE_sC-vjzVY/edit#)

## Identify/Communicate HR Need

Any time an HR need is identified by the PC, it should be communicated to the OPPM. Some possible conditions where a need may arise include (but not limited to):

* Projects are in the pipeline and we don’t have the team for it
* A PC identifies the current resources are not enough for a running project
* The Client is asking to add resources to speed up the work on the project
* Rubico wants to increase competency in our team

Any team member who identifies a vacant job position should complete a [New Employee Request Form (NERF)](https://docs.google.com/a/ithands.com/spreadsheet/viewform?formkey=dHViRVJpZVo4bjF1YlE4RlB2aS1iY1E6MQ#gid=0). The NERF is then processed and approved by

* [**HR**](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.ostoumaic29a)**/OPPM** *(analyze work)*
* [**Office Admin**](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.swpv01j8jesm) *(analyze space)*
* [**System Admin**](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.tnook9irtg0c)*(analyze Hardware and Software)*
* **Director** *(analyze budget)*

A NERF should be completed a minimum of 40 days before the expected joining.

New job vacancy will be discussed by Huddle team members. Both meeting and NERF should address issues including, but not limited to:

* Area of working
* Number of vacancies
* Job details and department
* Skill set
* Required Experience
* Time of joining and involved deadlines
* Part time or full time employee required
* Office timings (dependent on current projects)
* Minimum job requirements:
* WPM minimum 25 for any candidate
* WPM minimum 30 for PC/TP/PM
* Technical skills according to job requirements
* Demonstrated communications skills
* Demonstrated learning ability
* Demonstrated problem solving ability/disposition

## Strategy for Expanding Capacity

### Additional Projects

Software engineers are all busy, but another project comes in. Here are the possible solutions in order of priority:

* Ask for a time extension from the Client
* Request a team member to take on as an “additional project”
* Hire a vendor
* Reject the project and refer Client to another IT company

**Policy for assigning additional projects**

* Eligibility
  + Currently only applies to Software Engineers
  + The person must meet or exceed their billable hours (or be close) in the previous week to be eligible for extra work
* Employees can work from the office or from home
* Employees should work during regular office timing when they are available (but only the time spent working outside of regular office hours should be logged on the [Extra Project Timesheet](https://docs.google.com/spreadsheets/d/1ISdh3IR8urftmE1B1noAotjZnbGGmXMIUAWn25m_psY/edit#gid=363507542)).
* Employees should not log the hours in the extra project timesheet if the person works on the same project on Super Saturday and added hours in the Super Saturday document.
* Employees must record their hours in the provided [Extra Project Timesheet](https://docs.google.com/spreadsheets/d/1ISdh3IR8urftmE1B1noAotjZnbGGmXMIUAWn25m_psY/edit#gid=363507542) and Club on the same day.
* These hours are also billable to the Client with the other project hours.
* Remuneration
  + Payment will be determined by the given formula:

Compensation = [(Monthly Salary / 30 Days) / 8] X Billable hours X 1.5

* + This extra pay will be credited to the employee’s salary account on the regular salary cycle
  + Release of payment is subject to OPPM review and approval
* Decisions regarding who is eligible for to take on extra work are made collectively by the:
  + OPPM
  + Director

## Vendor Management

### Definitions

* **Vendor** is a company hired to provide a specific service.
* **Contractor** is an individual who is hired to provide a specific service.

### Vendor Process

See [Vendor Management](https://docs.google.com/document/d/1a0MgocXh1ZUvWFPsBJn4r0w4JT7UCrIdkXSyPX-kqY8/edit#)

# Google Docs Index

\* The Responsible Person is expected to:

* Update, upgrade and improve the doc (and get others to help them improve it)
* Educate the team on how to use the doc
* Keep team accountable to use it

| **Google Doc** | **Description** | **Responsible Person\*** |
| --- | --- | --- |

## Questionnaires & Sales Collateral (Shared with BD Team)

| [Get to Know You Questionnaire](https://docs.google.com/a/ithands.com/document/d/15M5MWkdD2JMSz2rrFszzqzKKhhdSZvNus90YuX_mpmk/edit)  (For Ad Agencies/IT Companies) | This is an extensive questionnaire for Ad Agencies or IT companies to complete in order for Rubico to get to know them and their style of working. | Sarah Aanchal |
| --- | --- | --- |
| [Web Application Questionnaire](https://docs.google.com/document/d/1Re2-KJhpt3ylgH5Hx_ca6DNJJhswpkxQGsIZosmxLe4/edit) | This questionnaire is created for the Clients who are in need of getting a web application developed. The document will need to be filled by the Clients (or prospects) in order to provide initial details to Rubico. Rubico team will define next steps based on the information provided using this questionnaire. | Sarah Aanchal |
| [WSQ (Website Support Questionnaire)](https://docs.google.com/document/d/1wen1BaoFjR0dOA2Fz3lqR30K0hxRwEArXkqWDF_H_9I/edit#) | In order to provide proactive support to the Client whom Rubico is providing managed hosting services, this questionnaire is crucial to set expectations for both Rubico and the Client. | Sarah Aanchal |
| [WDQ (Web Design Questionnaire)](https://docs.google.com/a/ithands.com/document/d/1iq5TtDZNUptD0gJhqnzwfioPuNCWbRpuUpBFgh-UWSo/edit)  (For Direct Clients) | Clients are required to complete this in order for Rubico to provide them an estimate (proposal) for doing a web project.  This is a worksheet which enables the Client to communicate basic information about their needs to the team. It gives the Client an opportunity to brief the purpose, objective and what services (IM, Hosting, Domain, etc...) they would like to opt as a part of the project. | Sarah Aanchal |
| [DMQ (Digital Questionnaire)](https://docs.google.com/a/ithands.com/document/d/1Xw_qyFVQ7euUC8S-5BOpEBAzRRCJoZCNH68_vQkqGVg/edit) | The Business Development Team uses the DMQ for getting requirements from a prospect. The purpose of this questionnaire is to get a better understanding of the prospect’s business, target audience, market, and operational goals. The information that we receive will help us tailor a custom solution for the Client’s organization and determine the strategy needed for development, optimization, and marketing. | Sarah Aanchal |
| [MAQ Mobile App Questionnaire](https://docs.google.com/a/ithands.com/document/d/1zzQJliGxcoZrl328za_el9sDE94emHlJ72TrLC2x2Tk/edit) | This questionnaire acts as a guide in reviewing other Mobile apps that are either their competitors or that are in a similar industry. The idea behind this exercise is that our Clients get a clear picture of what others are doing, what they want from their app, and what can make them stand out. | Sarah Aanchal |

## Digital Marketing Docs (Shared with PCs)

| [Digital Marketing Sheet](https://docs.google.com/spreadsheets/d/1mQmBo3QFj3Am0Mm9slYLNzpKTslQZ2cANCUfnGJbUK4/edit?usp=sharing) | This is a template linked off of the Project Master Doc.  The Digital Marketing Sheet has templates to help plan site architecture, url structure, metadata (meta descriptions, title tags, alt tags, etc.), data and analytics tracking, keywords, and url redirections. This sheet contains all the information that is involved with basic SEO, plus extra templates in case the client wants more advanced Digital Marketing services. This information is important because the search engines (like Google) see this information and use it to properly rank each page on the site and present information on search results. It is important that the language and words used in the site are correct. The Client should review the words, phrases, and general language on the document and make corrections as needed. After the information is approved, we will use this info in building the site. | Jacob Clayton |
| --- | --- | --- |

## Project Staging Docs (Shared with PCs, RMs)

| [Project Kickoff Meeting](https://docs.google.com/a/ithands.com/document/d/1T1yXxIT90DzUX-JzQPmnUU0SQYZMkc1fcBxcbl0oMB0/edit#heading=h.nna47l7q9e21) | The purpose of this document is to plan and conduct the Kickoff meeting effectively. The project team will get introduced to RM, then the RM will transfer all their knowledge about the Client, his business, and the project to the team. For more info refer to [Step 2: Project Kickoff Meeting](#_md77d9q4eyb8) | William Harsh/Chloe Sonakshi |
| --- | --- | --- |
| [Project Startup Meeting](https://docs.google.com/a/ithands.com/document/d/1FTC3K5WqsnSMH6nbJbjYZBgtwpSm_ILRee4hsQ_ihNU/edit#) | The purpose of this document is to plan and conduct the Startup meeting effectively. The project’s team will get introduced to Client, and Client is expected to introduce his business and project to the team. For more info refer to [Step 4: Project Startup meeting](#_c8fnxob88vgn) | William Harsh/Chloe Sonakshi |
| [Project SpecDoc](https://docs.google.com/document/d/1NZEqAL19shShtNmWG1PlgCpjWAuG0w4_U1axS5Xc3gA/edit) | The SpecDoc is created before development begins and the intended audience of the SpecDoc is the client. The SpecDoc helps to get the Client and team all on the same page. This is a techno-functional document so Tech Point and Tester are both responsible to complete this. The Tester should add the functional details about the module/task/form and Tech Point should add all the technical details including DB/Services etc. Both should review each other's work and finalize it together. The PC should review it before sharing it with the Client. |  |
| [Project Checklist Master TEMPLATE](https://docs.google.com/spreadsheets/d/1LwrNpOSwcEwPVZECR-wssNgToA71fZPFIHIZ7Psqsg0/edit?gid=132934918#gid=132934918) | The purpose of this document is to keep track of all the tasks and goals by individual team members that are necessary to complete the project. | / Calvin Anshul |
| [Project Code Review Doc](https://docs.google.com/document/d/1ii0dkImKRcVG1qg55gLyEGaPfQu8DQuCLFMx3iS_AEo/edit#) | The purpose of this document is to ensure that a proper code audit is done in the relevant phases of the project and to verify that proper coding standards are followed. This helps to identify bugs and coding errors before the product goes to the next step and ensures great quality. | Arthur Atul/Edwin Chandra |
| [Scrum Process](https://docs.google.com/a/ithands.com/document/d/1qqHhpPWRZjQFaxs5oXIV_fpjN5ieO-nF-RlmhwlPo40/edit) | The purpose of the document is to give our team and Clients an introduction to Agile and help them understand the Scrum process. | Stan Gutwein |
| [Project Estimation Template](https://docs.google.com/spreadsheets/d/15QFr_g2XrZi_red6oLyvAH3kkfrkGyQ7yJi5yBMVSaU/edit#gid=1905458561) | The purpose of this template is to provide a standard way to all the people who are doing estimations, so that they are not missing anything. | Steve Surya |
| [WordPress Performance Audit Template](https://docs.google.com/document/d/1vsC9rXzOYoplVdcPWNzaUdeTtXhMSb2CblUeoN_SqSo/edit#heading=h.i39v8x2ujouz) | The purpose of this template is to help the team with generic performance recommendations. This document can be used for projects where we need to improve the performance of the website as well as for new WordPress projects. | Steve Surya |

## Project Release Docs (Shared with Everyone)

| [Project Checklist](https://docs.google.com/spreadsheets/d/1HX9y1Sk1YJA1wpXZFqB1ilb4MCaRrQAaqaLNaofd3Fs/edit?gid=1558734776#gid=1558734776) | This checksheet assists in quality control of every project. The Project Coordinator is responsible for managing this checklist and assuring its completion at the proper time. However, every tab has the responsible person assigned. | Jason Harsh / Chloe Sonakshi |
| --- | --- | --- |
| [App Publishing Information](https://docs.google.com/document/d/1ZNjG2AFcmb5G1jQPjPnODGPHVAWsB9F8Hewg0l067t8/edit#heading=h.68aiuc1rdy1d) | This document will be used only on mobile projects and all the PC’s should send this document to Client after they approve the app and are ready to submit it to the app store. This document will collect all the information which is related to the submission on App Store and Play Store. | Jason Harsh / Chloe Sonakshi |
| [Project User Acceptance Testing UAT Sheet](https://docs.google.com/spreadsheets/d/1FknRI9kW83jtMpiqZ3gdIAbtXGJn_b_7FLEnUwZazKs/edit#gid=14161040) | The UAT Sheet is a guide to help Clients do proper testing for their project. The Client understands their business and users deeply, therefore they are ultimately responsible to verify that all functionality, layout, etc. is working according to the user’s expectations and ensure all the information submitted on forms is getting delivered properly. | Kevin Kundan |

## Project Management Docs (Shared with Everyone)

| [Mother Doc](https://docs.google.com/a/ithands.com/document/d/1iOE-M9AmrQkf7qLjjr4HwYH9SMDS2ijAxQ10_XWxRGg/edit#heading=h.psg7svlocsko) | This Doc is used to keep track of Clients that have multiple projects. The Master docs are “children” to this doc. | Stan Gutwein |
| --- | --- | --- |
| [Master Project Template](https://docs.google.com/a/ithands.com/document/d/1XTB6WkLER7Li_mgeqyL3Oe0bhoJToJgdD4DBszH2oJ0/edit#heading=h.lnn39b22xquo) | Master Project doc’s primary purpose is to collaborate with the Client. The primary audience of this document is the Client. Care should be taken not to put “internal” information on the Master doc that is not relevant to the Client. It contains information and links to other Google docs that we are collaborating on in reference to the current project and other docs that are for reference purposes. This doc will also serve as an index to make all the project related information accessible from one central place. | Jason Harsh / Chloe Sonakshi |
| [OPPM](https://docs.google.com/spreadsheets/d/1kBb5EbvCSWjRLcDLu3R0-oOgxbowTaEEg0BBijEIteI/edit#gid=1368702071) | This is a document that is used to express essential project details, tracking progress, risks if any, and communicating those details to upper management. | Jason Harsh /  Alan Anil |
| [Dashboard](https://docs.google.com/spreadsheets/d/1fK8RMZikVAovPXggs-SW1YlumpWXmndx-OCrfAPmCUw/edit#gid=2045635690) | OPPM and BD view this regularly for planning purposes. | Luke Lokesh /  Alan Anil |
| [All Projects Info](https://docs.google.com/spreadsheets/d/1QbcsF4LkDxtqoLqcKMkM2k49jm4eZtmksZU9P_o-Tws/edit#gid=889245517) | This sheet contains all info about sites we have worked on. The following details can be used time to time via this sheet:   * CMS version update/upgrade * Forms security (defines which are secure form on site) * Payment gateway details (defines which sites has payment forms) * Etc. | Jason Harsh / Chloe Sonakshi |
| [Project Review Report](https://docs.google.com/document/d/1JzfhZHlnJLjhMVv_t2pBlIPxJ82vW3-Yn326SUqe2UU/edit) | This is the final document produced for the project or when a particular phase or milestone has been reached. It is a worksheet used by the team to assess the success of the project, identify best practices for future projects, resolve all open issues, and formally close the project. | Jason Harsh / Chloe Sonakshi |
| [KT: Project Template](https://docs.google.com/a/ithands.com/document/d/1eelmnf6OxbGqahw7sBChLqBwlqE65fw3mIzgR8MElTc/edit#) | The Knowledge Transfer Document is the final internal document produced for the KT of a project when we reach a point needing to transfer the project to a different Project Coordinator. | Kevin Kundan /  Saahil Joshua |
| [Client Questionnaires](https://drive.google.com/drive/#folders/0B6uDncT0R_3Fc2tBVi01ZlpfeEU) | The PC’s use these questionnaires with the Client after a project is started:   * [Proposal as a Service Questionnaire](https://drive.google.com/open?id=1oTQbD29SrHtEyDBegrhVJml5OqhGssj7me2Ut_I2WWA&authuser=0) * [CAQ Competitive Analysis Questionnaire](https://drive.google.com/open?id=11mXeSInFm3oZSsPTeeq9BhfOOsirOnv2NX8XN_mN0RU&authuser=0) | Jason Harsh / Chloe Sonakshi |
| [CAQ (Competitive Analysis Questionnaire)](https://docs.google.com/a/ithands.com/document/d/11mXeSInFm3oZSsPTeeq9BhfOOsirOnv2NX8XN_mN0RU/edit) | This is a worksheet that guides Clients in reviewing other websites that are either their competitors or sites that are in a similar industry. The outcome of this exercise is that the Client will form a much clearer idea of what they want their site to be and thus articulate that clearly to the team. | Jason Harsh / Chloe Sonakshi |
| [Rubico SLA Service Level Agreement](https://docs.google.com/document/d/1ODvn3X_3FS8v7uhswk2hOnZY-BzVGvgK1Y1MXR2a1_o/edit#heading=h.tgebv2czy36z) | The purpose of the document is to convey a clear message to our Clients about support engagement levels, issue prioritization, and relevant contact person information during project lifecycle and ad-hoc emergencies. | Stan Gutwein |
| [How Rubico does Estimates](https://docs.google.com/document/d/1dpRKL3ZtC-_cAJRx_ERiJ8AgqqvRf_sncx86_y7Zi0E/edit) | This document is shared with Clients to help them better understand how RUBICO does estimates. | Stan Gutwein |
| [RUBICO Support Contacts](https://docs.google.com/document/d/1IqKg14HBCKIaa88_EYiOHfz9NECIdLu0rB3ki6vWyEo/edit#) | This document lists out the support contact info. This document can be used by the Clients if they need support from the RUBICO Team (Hosting etc.) | Kevin Kundan |

## Technology [copied from Green Book]

(Shared with the Network team and people who require access to credentials on a need basis PC’s, Stan, Kundan, Surya)

| **Responsibility Matrix** | | |
| --- | --- | --- |
| [Roles and responsibilities](https://docs.google.com/spreadsheets/d/10-r74WvwIvRPWeHb1OUZ7jporbR7QunPIk1Wttoi0tg/edit#gid=0) | This document highlights the responsibility of network/server team based on their priorities | Surya |
| **Domain/Hosting/FTP** | | |
| [ITH Hosted Accounts Configurations](https://docs.google.com/spreadsheets/d/1nekiuUzvJe0lnB3iB_A9S7tYZ_59ojYgn2BoOi7ROWc/edit#gid=0)  [Rubico Hosted Accounts Configurations](https://docs.google.com/spreadsheets/d/1nekiuUzvJe0lnB3iB_A9S7tYZ_59ojYgn2BoOi7ROWc/edit#gid=0) | This sheet contains info about all the hosting servers we have including:   * Web servers (Standard, Performance, Lightsail etc.) * Team servers (VPN, Jenkins, GIT etc.) * RDS (RD databases) | Surya |
| [Domain Hosting Requests](https://docs.google.com/a/ithands.com/spreadsheets/d/12cGuBEudukdwdrmm9EqhJtAVgHQTXOaLG9pTmgVXRTA/edit#gid=1709429414) | This sheet has 2 purposes:   1. Contains the request made by Team to create new hosting accounts (LIVE, Staging) and Git Repo 2. Contains all hosting account details hosted on our AWS servers | Surya |
| [Domain Admin Secure Info](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AvKmXnsuu-OrdEJ5SGhzb2ZlTmtEeHhrb1Q2N3Z3VVE#gid=0) | [This sheet contains very very secure information e.g. admin credentials for our servers.](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AvKmXnsuu-OrdEJ5SGhzb2ZlTmtEeHhrb1Q2N3Z3VVE#gid=0) | [Surya](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AvKmXnsuu-OrdEJ5SGhzb2ZlTmtEeHhrb1Q2N3Z3VVE#gid=0) |
| Database [Info](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AquDncT0R_3FdE9YSVpyUUdwdDN3MENIYy12R2VTRUE#gid=0) | [This sheet contains very secure information like Database credentials (AWS).](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AquDncT0R_3FdE9YSVpyUUdwdDN3MENIYy12R2VTRUE#gid=0) | Surya |
| [Server outage Report](https://docs.google.com/spreadsheets/d/1srpX-BBiU7ZcHyb_qLYFq6pA8TsloVCBqbR6M8MO5Hk/edit#gid=0) | Server outage details | Surya |
| [SSL Info](https://docs.google.com/spreadsheets/d/1Aa6JRBoeVkxy3tP5RD6PqkVoxOmVfw15OIhlQEFCcQs/edit#gid=454095263) | This document includes information about all the SSL configured and their renewal | [Server Admin](https://docs.google.com/document/d/1DVDyufrFlFtdlspaqPOFkU_FWgRHFUNLh5NYgiQBSXs/edit#heading=h.jhy2kq62msj1) |
| **Hardware/Network/Local Servers** | | |
| [WAN Architecture HDR-DDN](https://docs.google.com/drawings/d/13MnKNMPHqNxIS4Phqh4ygg-k4rqnXb3FEHXtftDieBw/edit) | This Architecture lists out all the networking critical components available within the Haridwar office. It will help to plan out the changes/improvements and fix any issues by looking at the diagram at a glance. | Surya |
| [Rubico IP Addresses](https://docs.google.com/document/d/1IqEfbSnzALHxeOSBr8pJHMVTQJhduUGK6TE-BYJRTeQ) | This document lists the IP addresses that Clients would need to whitelist if they want to give us access to their services by IP address | Surya |
| [Hardware Software](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AvKmXnsuu-OrdFBTZ3dlZXNTeURzWkFac1lQaWRoN3c#gid=1) | This sheet contains all the hardware and software information that we have in our Haridwar and Dehradun office. For example, available machines, printers, routers, software licenses and their usage etc. | Surya |
| [New computer requirement](https://docs.google.com/spreadsheets/d/125wb0QAsVJBaKXFY-InrggVy412QoUIpxNz_ifTaZYc/edit#gid=1606485096) | This doc is used to define what needs to be purchased. Related people will get notification once something needs to be ordered. | Surya |
| **Software/Accounts** | | |
| [RUBICO Account Info](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AquDncT0R_3FdElabnloT0RlX0UwVFJLTVZxTmVzU3c#gid=0) | This sheet contains the login information of all the important Rubico Accounts. | Stan |
| [RUBICO Test Accounts](https://docs.google.com/spreadsheets/d/1_aXPerBI4he1xckQxRSLGKNlWcbi31Lqc5-_zxJMS-8/edit#gid=259436681) | This sheet contains the login information of all testing accounts and testing emails. | Surya |
| [Basic Software Checksheet](https://docs.google.com/a/ithands.com/document/d/1J1eLncsmpSPIMWRlG3FwJmLuLQCRYTpUPxOR-D1ZWj0/edit#heading=h.56eh8ltyqmqx) | This sheet contains list of basic software for users | Surya |
| [Code Editors (IDE) used](https://docs.google.com/spreadsheets/d/1EW-eFa5PA54x5YYfMpuqgjbHplFu13t6cypiw871Jmc/edit?ts=5cc190d4#gid=0) | This sheet lists all developers and the IDE used by them to code | Surya |
| [System health check](https://docs.google.com/spreadsheets/d/1VNBSRwlcpwlIpdWGBatb2os6aYYQh3oH-ZrKWcKwX8w) | Periodic maintenance checklist |  |
| **Google Apps/Emails** | | |
| [Client Friendly Name List](https://docs.google.com/spreadsheets/d/1w8vr7RxxuUCTjf9KQqEHLlhuk3fLSwv-beD8H_71GIg/edit#gid=1383602835) | This sheet contains a Client Friendly name list | Natasha Neha (HDR), Alexis Anikita (DDN) |
| [Google Apps Email Hosting](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0Ai6dL7icDb7PdHlYeUMzMUhOTm1HZk92Tks0UkhsZEE&usp=drive_web#gid=3) | This sheet contains list of Clients emails we are hosting with google apps reseller account | Stan |
| **Internet** | | |
| [Internet Plans Downtime Records](https://docs.google.com/a/ithands.com/spreadsheets/d/1I8j4LGC4JzD89HdVdbLU5jA2K6IcdqBgndc82E-EDRs/edit#gid=0) | Internet plans management doc is used to manage all ISP’s available within the Rubico HDR and DDN office. This document will have updated information about the downtime of any ISP we have.  This document will be used to recalculate the payment for the ISP based on the downtime. | Surya |
| [Wifi Access Management](https://docs.google.com/document/d/1toiQeDUbf9Xbv-3grUjzPRNTHHkd0gf2gLfUjIuMX3Q/edit#) | This doc defined the Wifi access within the Rubico HDR and DDN office. This is a living doc to manage wifi connection naming conventions and ISP associated with a specific Wifi. | Surya |
| **Router configurations** | | |
| HDR |  |  |
| Ubiquity Main and Backup Router | Here is the [link](https://drive.google.com/open?id=18RP0KzoXW7oDx9pfOtkPmLsVu6NcfCs_9yGshoU8uak) | Arlan Aadarsh |

## Support/Maintenance

| Support Form (Maintenance) [HDR](https://trello.com/b/KZQkPaGF/rubico-hdr-office), [DDN](https://trello.com/b/bcN3M8pA/rubcio-ddn-office) | Trello Board for Admin Rubico team members if any team member faces any maintenance issue related to the office. | Kevin Kundan |
| --- | --- | --- |

## Quality Development (Shared with Everyone)

| [Test Plan](https://docs.google.com/document/d/1neUl94Ls8euXOA0oP3tH5h_vNhQgDqPnIknvHaGQTjU/edit#heading=h.5wotl6c2dg3) | This document defines the testing strategy of a project. In this document we cover things which are related to quality and plan how we will be performing the testing and what all our testing will cover. |  |
| --- | --- | --- |

## Huddle Docs (Shared with Huddle Team)

| Huddle Meeting Agenda  [ask Stan for link] | This is a document that is used to plan and document the Monthly Huddle meeting agenda items. It lists all items that Huddle team members would like to discuss in the meeting. | Huddle Coordinator |
| --- | --- | --- |
| Huddle Meeting Notes  [ask Stan for link] | This is a document which is used every month to maintain the three areas for each Huddle member:   1. Mentoring 2. Improvements 3. Challenges/Obstacles | Huddle Coordinator |
| [Dev Day Agendas](https://docs.google.com/spreadsheets/d/1JcsLBtjXoifEwaRIk0cFFVUiRYbuhamMX5hQk5zMe10/edit#gid=551749221) | This is a document that is used to plan and document the Dev Day agenda items. It lists all items for who presents what on a particular Dev Day. | Kevin Kundan in HDR  Saahil Joshua in DDN |

## Profitability and Billing

| [Master Domain](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AlmZH9Bryx3KdGRFUDdUa29tMjJZUEFKQmsyd3BYb0E#gid=0) [and Monthly Billing](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0ArKb7n33MpEKdHNEbHp6cl9HemlGZWhFbmxNUDBXcEE#gid=4)  [ask Stan for link] | This is a document that is used to record and track all the recurring billing details for Clients (hosting, Google Workspace, FTE, etc). Brandon is responsible for managing this. | Brandon |
| --- | --- | --- |
| [timesheet.rubico.tech](http://timesheet.rubico.tech) | This is the system that is used to record and present the billable information of all project related work and make it accessible to Brandon. | Alan Anil/Steve Surya |
| [Master Proposal Billing and Vendor Payments](https://docs.google.com/spreadsheets/d/1hrcXJg3J1nOhDVlTrV9zabD5xsdHJwrmZ1dsep4AoRI/edit#gid=5) | SA updates this doc with all pricing info relating to an accepted MSA while also tracking all the billing details for Vendors. Brandon uses this sheet in order to bill Clients and to pay Vendors. | Brandon |

## Vendor’s Task and Timesheet (Shared with PC, Stan, Matt)

| [Vendor Teams Directory](https://docs.google.com/a/ithands.com/spreadsheet/ccc?key=0AlCaKz-vNDwbdGI2R0o2UF9yR1F5YXlxTThEeURfS0E&usp=drive_web#gid=0) | List of Vendors who are or may be good people to work on Rubico Inc projects with Rubico IT Private Limited. | Stan |
| --- | --- | --- |

## Books

| [Orange Book MASTER](https://docs.google.com/document/d/1XeArVH8bfTgGJ70wd5RiSqQycxzjW2202MHswlXxGmg/edit#)  [Team Version](https://docs.google.com/document/d/1J66UPR8WpjzTwiTNIU1CXUUzIDELeRs6p9hwF75FBXk/edit) | Operations Policy | HDR: Jason Harsh  DDN: |
| --- | --- | --- |
| [Red Book MASTER](https://docs.google.com/a/ithands.com/document/d/1iwtWNOZ4rxKAftuPiAJC5A2wr7cPP_UqBG9vcDii0DU/edit)  [Team Version](https://docs.google.com/document/u/0/d/19u6bLSHgCx4dKBMkIBXt2-lIAEUrHUq-IZPQxDDOytY/edit) [link changes] | Office Policy | HDR Kevin Kundan DDN: Saahil Joshua |
| Blue Book  [ask Stan for link] | Admin Policy | Clint Krishna (Stan) |
| Pink Book  [ask Kundan or Saahil for link] | HR Policy | HDR Kevin Kundan DDN: Saahil Joshua |
| Gold Book  [ask Stan for link] | Business Development Practice and Policy | Stan |
| [Violet Book](https://docs.google.com/document/d/1ZKR984u7Fdu1Fv2qb_T3M5iebJkPmjE2ZcVfXDcWyik/edit) | Recruitment Process | Alexis Ankita (Claire Kanika) |
| [Green Book](https://docs.google.com/document/d/1oS5rtjnvynWrqPDTRm9hNE51t3AWJyhv-zBFKkMRYAU/edit#heading=h.vq4epddp2gxy) | Network Management Protocols | Brandon George |
| [Silver Book](https://docs.google.com/document/d/1vt36HoR5xvXlB_ip-8k_nBgBA7wCWDH3Jt_2yV-9JWk/edit) | Cloud Server Management Protocols | Brandon George |
| [Purple Book Master](https://docs.google.com/document/d/1XCTI1YFMBlghJF2aTnR_U1wl_zjMn8aS_rzCiCKGfp0/edit#heading=h.273ve7orwn0c)  [Team Version](https://docs.google.com/document/d/1km8Lvwmj2u3E6pqTnMpYIhISjgQ4rc2P9iLmx27aq6o/edit#heading=h.4ygwjmgrfpf3) [link changes] | Software Development Practices & Protocols | HDR: Arthur Atul  DDN: Edwin Chandra |
| [White Book Master](https://docs.google.com/document/d/1RPqLX38D8pcbPSATzhGydV0IL38Y4cOW-JyrI82HCTA/edit#)  [Team Version](https://docs.google.com/document/d/1pp1l4YwHVIIZYSqe31kpp55Uz2qbZeqo5oHrpuRuggc/edit#heading=h.j8uwb8t4fbdr) | Quality Assurance Policy | HDR: Aaron Amit  DDN: Asher Ashutosh |
| [Bronze Book](https://docs.google.com/document/d/1Q7M_Ixrz_pZrj6aSIc5FGcL15IyoM4lgBPvLLF9Caxw/edit#heading=h.5ez4y2eq9nzt) | Marketing Process | Chirstopher Haylett |

## Other Docs

| [Rubico DDN Guest Room Info](https://docs.google.com/a/ithands.com/document/d/1p9itrYdh7tJy9bm9mNgh0Da-4dR6UjILpFKkuOGG7nI/edit#) | This document has all the helpful information that the team may need for DDN Guest House. | Saahil Joshua |
| --- | --- | --- |
| [Sample Emails](https://docs.google.com/a/ithands.com/document/d/1HAUOvFj0e2cAiSx_3myJnH-3tyiNZ7H9yJCFhUrWD4g/edit#) | This doc contains tips and templates of emails. Also included are real life example emails sent from Google, Apple, Rackspace, etc. These are useful to use for inspiration when you need to communicate difficult challenges to the Client. | Stan Gutwein |

# Acceptance of this Policy

As an employee or trainee, I understand that this policy is being updated and new versions of this are released regularly. I have read, understood, and agreed to abide by it completely, unless I have written permission from the Director. If for some reason I am not able to follow any part of it, I will immediately discuss it with the Director.