

How to get work done... fast

Why do we need this

(If you want to skip the rationale behind the process, go directly to [Using Jira](#)).

A startup's superpower is its ability to iterate/ execute/ be nimble. Anything that gets in the way of that is a hurdle we should look to avert.

Think back on your day, week or even past roles. What were some execution hurdles (add your own):

Barriers & Hurdles	Possible root cause
Why are we working on this task?	1. Unclear objective
Why is this task <i>still</i> being worked on?	2. Poorly defined
Why is this task <i>not</i> being worked on?	3. Competing tasks from other lists
Hasn't this issue come up before?	4. Issue slipped/ wasn't captured
Everything's marked 'high priority'?	5. Priority rules unclear / not mapped to company objectives (OKRs)
What does this task mean?	6. Too jargony/ technical
Why can't I find more info on this?	7. Historical information not easily available
Is everyone off playing golf?	8. Invisible team output
I need to fill this info out again?	9. Repetitive work
Who is responsible for doing this?	10. Unclear ownership
Why am I in so many meetings?	11. Handoff protocol not established
By ___ did you mean ___ ?	12. Redundant vocabulary
Customer: "When was this fixed?"	13. Fix wasn't communicated back to customer
Why does this partner team not care?	14. Goal misalignment between organizations

Who has figured this out

Luckily we aren't the first distributed and growing team.

- Merci Victoria Grace used a similar pre-mortem when trying to figure out [how to get work done at Slack!](#)
- Zapier, Gitlab, Gumroad and others have led the way and [shared their learnings](#).
- Sports teams and even fast food restaurants provide analogous inspiration of how high performing teams work.

So what can we incorporate from these precedents when designing our own process/ workflow/ system.

- **Only as much process as necessary, as little as possible.**
- **Iterate**

Building blocks

Resolving these root causes needs a few building blocks:

1. **Jira, SFDC:** When tasks are funneled through a single place of truth, in our case Jira or SFDC, root causes 3 and 4 are alleviated.
 - a. **Jira prioritization framework:** FIFO is a prioritization framework in simple queue based workflows (eg: McDonalds). Ours is more complex, we of course don't want to work on something first because it came in before something else. Establishing a prioritization framework will alleviate root causes 1, 2, 5 and 6.
2. **Teams:**
 - a. **Channels vs Chats:** When communication happens via Standard Channels in Teams, root causes 7 and 8 are alleviated. Create new channels if you like for new projects ("Project: [Name of project]") while leaving the setting on "Standard-Accessible to everyone on the team".

Create a channel for "Customer Feedback" team

Channel name
HundredX Causes ✓

Description (optional)
Feedback from our Causes Partners

Privacy
Standard - Accessible to everyone on the team ✓ ⓘ

Standard - Accessible to everyone on the team ✓

Private - Accessible only to a specific group of people within the team

- b. **Notifications:** When apps notify one another, root causes 8 & 9 are alleviated. Push events from apps you use (Jira, SFDC, Github, Sendgrid, etc) to Standard Channels in Teams so the rest of HX is automatically updated without extra work.

3. Outlook:

- a. When setting up meetings:
 - i. Use aliases@ versus individual team members (e.g. eng@, product@, sales@). Resolves root causes 8 & 9.
 - ii. For managers: when new team members come onboard, they will need to manually add all group invites to their own calendar one time. After that, they will automatically be included in *new* invites for the alias.
- b. When emailing
 - i. Consider using a Standard Channel in Teams over email. Resolves root causes 7, 8 & 9.
 - ii. Use aliases@ (as above) when possible versus individual team members.

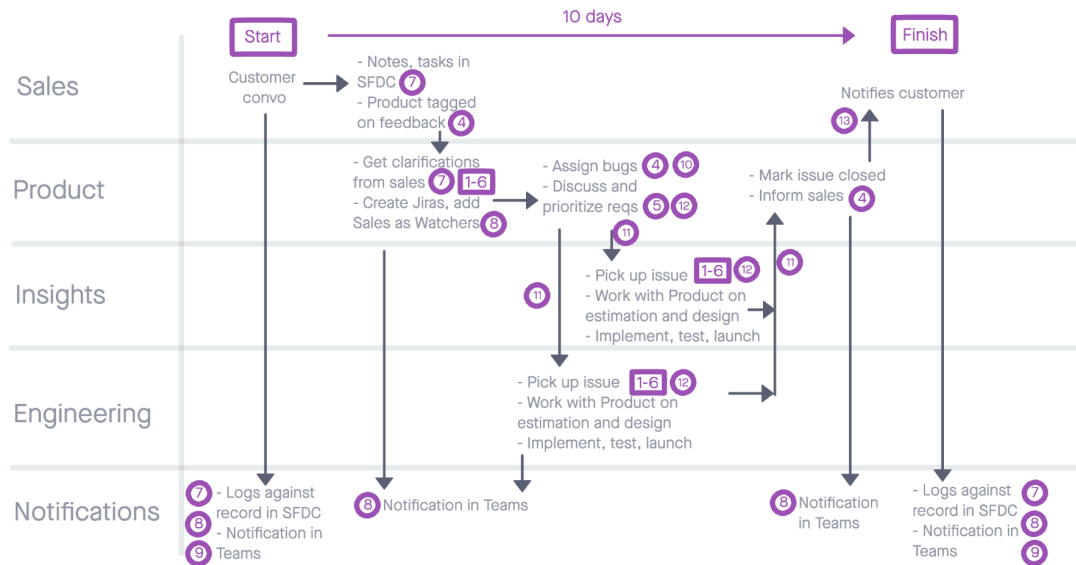
Using Jira

Let's look at a common workflow, HX responding to a customer request, and what that process looks like.

The numbers below map to those in the chart above. They're marked below at points in the process where they're remedied.

For example you see #7 alongside "Logs against record in SFDC" because when that step occurs, it solves hurdle #7 above by making customer feedback information available.

Agile iteration: Jira and SFDC are Single Places of Truth. Teams is like a FB feed of company-wide activity.



([Full Size](#). If prompted, click 'Continue as Guest' in top right corner and enter dummy email).

1. Submitting an issue (story, bug, improvement, task):

This applies to **anyone at HX** and is designed to be lightweight to solve root causes 4 and 9 above.

- In Jira: **hit Create** -> enter as much information as possible at the time (can flesh it out more later) -> **Submit**.

Type	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Update
Issue	LR-20	hi-fi screens	Aditya Sudhakar	Aditya Sudhakar		TO DO	Unresolved	Sep 22, 2021	Sep 22,
Issue	LR-19	put PRD together	Aditya Sudhakar	Aditya Sudhakar		TO DO	Unresolved	Sep 22, 2021	Sep 22,
Issue	LR-18	work with engg on backend data	Aditya Sudhakar	Aditya Sudhakar		DONE	Done	Sep 22, 2021	Sep 22,
Issue	LR-17	work with designer on prototype	Aditya Sudhakar	Aditya Sudhakar		DONE	Done	Sep 22, 2021	Sep 22,
Issue	LR-16	get more info from Tyler on this req	Aditya Sudhakar	Aditya Sudhakar		DONE	Done	Sep 22, 2021	Sep 22,
Issue	LR-15	4- Machine readable data	Unassigned	Aditya Sudhakar		TO DO	Unresolved	Sep 20, 2021	Sep 22,
Issue	LR-14	imp1054	fhpok	yicavi8227		IN PROGRESS	Unresolved	Sep 20, 2021	Sep 22,
Issue	LR-13	competitive intelligence	Aditya Sudhakar	yicavi8227		IN PROGRESS	Unresolved	Sep 20, 2021	Sep 22,
Issue	LR-12	nf1054	Unassigned	yicavi8227		TO DO	Unresolved	Sep 20, 2021	Sep 21,
Issue	LR-11	bug 1048	Unassigned	Aditya Sudhakar		TO DO	Unresolved	Sep 19, 2021	Sep 21,
Issue	LR-10	bug 1037	Unassigned	Aditya Sudhakar		TO DO	Unresolved	Sep 19, 2021	Sep 21,
Issue	LR-9	Imp 1018	Unassigned	fhpok		TO DO	Unresolved	Sep 19, 2021	Sep 21,
Issue	LR-8	bug 1017	Unassigned	fhpok		TO DO	Unresolved	Sep 19, 2021	Sep 21,
Issue	LR-7	NF 1017	Unassigned	fhpok		TO DO	Unresolved	Sep 19, 2021	Sep 21,

- Anywhere else: **Tag (@mention)** business owner from the **Product team** in your Sheet/ Doc/ App/ Email (eg: Salesforce) and they'll add it to Jira.

The screenshot shows a CRM interface for an account named "Bottle Rocket Studios". The top navigation bar includes tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More. The account details section includes fields for Type (Partner), Priority (1), Classification (Nonprofit/501C3), Office Phone ((214) 310-1800), Website (https://www.bottlerocketstudios.com/), and Account Owner (HundredX Admin). Below this is a "Related List Quick Links" section with links to Opportunities (0), Contacts (10+), Contracts (0), Files (0), Notes (1), and Cases (0). The main content area is divided into "Related" and "Details" tabs. The "Details" tab shows fields for Account Name, Type, Website, Description, Account Record Type, Customer, Account Owner, Parent Account, Office Phone, Classification, Priority, and Update. The "Activity" tab on the right shows a "Log a Call" button and a "New Task" button, along with fields for Subject, Due Date, Assigned To, Name, and Related To.

2. Triaging incoming issues:

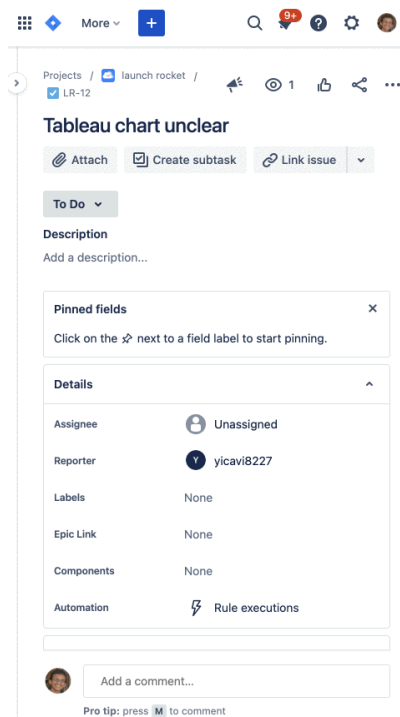
This applies only to the **Product team** and is designed to solve root causes 1, 2, 6, 10, 11 and 12.

- If issue doesn't need discussion: Some issues submitted are straightforward enough (eg: Typo in Tableau) that someone from the **Product team** assigns them to the [Implementation Owner](#) for that Area.

The screenshot shows a Jira issue page titled "Typo in Tableau". The issue is assigned to Aditya Sudhakar and reported by yicavi8227. The description states: "Acme Corp reported typo. See attached." The "Pinned fields" section shows a message: "Click on the x next to a field label to start pinning." The "Details" section shows the Assignee (Aditya Sudhakar), Reporter (yicavi8227), Labels (None), and Automation (Rule executions). The "More fields" section shows the Epic Link (None).

- If issue requires discussion: Some issues submitted require further discussion to understand the issue better. Someone from the **Product team** will **reach out to the Reporter** of the issue

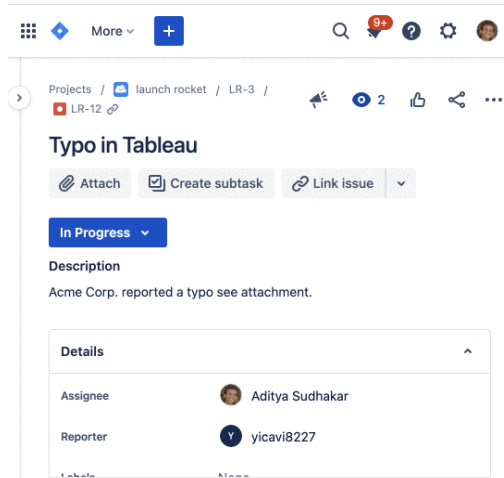
before taking further action, potentially [defining a requirements document](#) and setting up appropriate brainstorming and review sessions (e.g. with [Engineering team](#), [Data Science](#), and [Insights Teams](#)) to scope what is needed.



3. Handing off issues:

This applies to [anyone at HX](#) and is designed to solve root cause 5, 11 above.

- **Change the Assignee** to the [Implementation Owner](#) for that Area. Jira will notify them by email. They will also see the Issue appear in their list in Jira.



4. Working on issues:

This applies to **anyone at HX** and is designed to solve root cause 3, 5, 8 above.

- Issues will typically be marked as a Bug or an Improvement. All else being equal, Bugs are more important than Improvements. Bugs assigned to higher priority Epics are more important than those assigned to lower priority epics.

Eg: In the picture below, the first two issues are more important than the latter two because they're tagged to a #1 priority Epic while the latter two are tagged to #3 and #4 priority Epics. Further, the first issue is more important than the second because the former is a bug while latter is an improvement.

If there are multiple equally important issues, have a discussion with your team lead.

T	Key	Summary	Assignee	Reporter	Status	Created	Updated	Due	Epic Link ↑
	LR-13	competitive intelligence data bug	Aditya Sudhakar	yicavi8227	IN PROGRESS	20/Sep/21	23/Sep/21		1- Tableau workbook
↑	LR-20	hi-fi screens	Aditya Sudhakar	Aditya Sudhakar	TO DO	22/Sep/21	22/Sep/21		1- Tableau workbook
↑	LR-21	Templatize "analyst hours" product	Aditya Sudhakar	Aditya Sudhakar	TO DO	23/Sep/21	23/Sep/21		3- Analyst hours
	LR-22	Data missing	Aditya Sudhakar	Aditya Sudhakar	TO DO	23/Sep/21	23/Sep/21		4- Machine readable data

- When you pick an issue to work on, change the Status to **"In Progress"**.
- Add Tasks to the issue (eg: Send email, set up meeting) both for your own problem solving clarity and broader transparency.

Projects / launch rocket / LR-15 / LR-22

Data missing

Attach Create subtask Link issue

To Do

Description

Add a description...

Details

Assignee: Aditya Sudhakar

Reporter: fhpok

Labels: None

Epic Link: 4- Machine readable data

Components: backend, data science

Automation: Rule executions

More fields

Due date: None

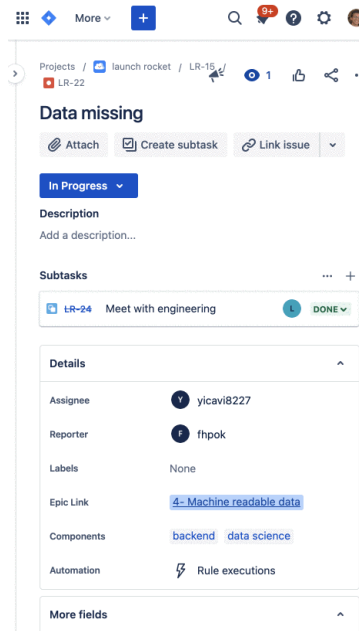
Created 11 hours ago Updated 9 hours ago

Configure

5. Closing out an issue:

This applies to **anyone at HX** and is designed to solve root cause 13 above.

- **Mark the issue Done** and assign to the business area owner from the **Product team**. They will help communicate the resolution to the customer (internal or external).



Resources

1. [PRD -- Sample PRD Document](#)
2. Join the [Planning and Prioritization meeting](#) (Tuesday, 11am PST, 1pm CST). If you'll be joining on an ongoing basis, please chat with **Ryan Morris** or **David Allison**. In this meeting estimates of the cost (of engineering, maintenance, etc) and the benefits (why are we doing this?) of open Jiras will be discussed and a timeline will be defined for when the work will be completed (or it will be "parked" if it is not actionable yet).
3. [Jira prioritization framework](#)
4. [Follow your ticket](#)
5. [Insights Platform Kanban Planning Board](#).
6. How to **ESCALATE!**
7. Appropriate owners

Area	Business Owner	Implementation Owner
HX Insights: Tableau Insights Products	David Allison	Travis Watters
Tableau Custom Solutions	David Allison	Travis Watters

Reporting		
HundredX Causes Tableau Reporting	Ryan Morris	Travis Watters
Custom solutions / System Integrations	Ryan Morris	Michael Wong
Data Warehouse (Analysis Tables, Product Tables, etc)	Ryan Morris	Michael Wong
Data Science Models	David Allison	Stephanie Pereira
APIs and Machine Data	David Allison	Michael Wong
ETL and Data Validation System	David Allison	Eric Rowell

Appendix

Jira jargon (FYI for **anyone at HX** not familiar with Jira):

Types of issues

- Epics: Large bodies of work that can be broken down into a number of smaller Stories. They map to business priorities (eg: Revenue).
- Stories: Short requirements or requests written from the perspective of an end user.
- Bugs: A problem which impairs or prevents the functions of a product
- Improvements: An enhancement to an existing feature in the product
- Tasks: Work that needs to be done to close out a standard issue in Jira (bugs or improvements)
- Subtask: Piece of work that is required to complete a task. Subtasks issues can be used to break down any standard issues in Jira (bugs, improvements or tasks)

Issue Status:

- To Do: Issue has not been started
- In Progress: Issue currently being worked on
- Done: Fix for Issue launched after implementation and testing

Other fields:

- Component: Area (eg: Tableau, frontend, backend, etc)

Issue States

Status	Assignee	Epic, Component	Description	Next steps
To Do	Product team	Blank	Blank/filled	Triage
To Do	Product team	Filled	Blank/filled	None. In backlog
In Progress	Product team	Filled	Blank/filled	PRD
To Do/ In Progress	Anyone at HX	Blank/filled	Blank	Assign to Product team
To Do/ In Progress	Anyone at HX	Filled	Filled	Work on issue

Notes on our technology

1. When using Teams chat:
 - a. For a project, either create a Group Chat named "Project: [Name of project]" with all appropriate team members included
2. When setting up meetings:
 - a. Use **aliases@** versus individual team members (e.g. eng@, product@, sales@)
 - b. For managers: when new team members come onboard, they will need to manually add all group invites to their own calendar one time. After that, they will automatically be included in *new* invites for the alias.
3. When emailing:
 - a. Use **aliases@** (as above) when possible versus individual team members.