Orcasound Onboarding Project Brief

Started on: 04/11/2023
Last updated on: 7/17/2023

Background
Describe what the project is about, the context and background.
Describe why it's being carried out. If it's a part of a wider customer journey, link it here.

In the past, onboarding of new volunteers was facilitated by one person and all information was provided in text documentation. A new volunteer's experience of onboarding was varied depending on when they joined and who facilitated it.

Step 1: Register on DemocracyLab
Step 2: Receive a personal greeting from the UX Team leader.
Step 3: Team leader would provide documentation for the volunteer to read and links to the tools used to participate.
Step 4: After reading the documentation and joining the relevant tools the volunteer would decide what projects to join and start attending meetings.

Objective
Describe what is the ideal future you want to have once this project is finished.
What is the outcome you're looking to get out of this?
How does this fit into your team's and/or company's wider goals? (Link them here.)
What is the benefit for the business? What is the benefit for the user?

Objective 1
To provide a website that all new volunteers can use to facilitate onboarding, where current volunteers can access information, and a place for volunteer feedback to live and access.

Objective 2
Automation of the onboarding process

Alternative solutions to automation:
●   Members of the onboarding team process the induction of new volunteers, either in rotation or assigning specific duties to team members (welcome email, etc.)
●   Open to suggestions

Key results & Success criteria
How will you know the project was successful once it's finished?
Think KPIs, OKRs, UX metrics, benchmarks, company targets (whatever your company is using).

Feedback from volunteers and organization will determine if the project is successful and what changes need to be made in the future.

Target audience
Describe the target audience for this project. You can link to your personas.
●   New UX volunteers
●   Current UX volunteers

The team and stakeholder map
Define team roles and responsibilities.
List stakeholders and describe what level of involvement is needed/expected.
Who is the decision-maker (sign off)?
[Note: One way of doing this can be a RACI matrix]

Stakeholders:

- **Main Orcasound Stakeholder:** Can provide background on who, what, where, why, and how for project requirements, including technical limitations. Limited, as needed involvement. *Scott Veirs*
- **Principal UX Manager:** Can provide background on who, what, where, why, and how for notification system, including technical limitations, but will refer to Main Orcasound Stakeholder. Involved as needed, is contacted before Main Orcasound Stakeholder, and directs project lead. Signs off on work when requested. *Brendan Thatcher*
- **Product Manager:** Can provide background on who, what, where, why, and how for notification system, including technical limitations, but will refer to Main Orcasound Stakeholder. Involved as needed, is contacted before Main Orcasound Stakeholder, and directs project lead. Signs off on work when requested. Facilitates UX work to production in GitHub. *Brendan Thatcher*
- **UX Managers/Other UX, Dev, or Other Leadership:** Can provide background on who, what, where, why, and how for notification system, including technical limitations, but will refer to Principal UX Manager or Main Orcasound Stakeholder. May not be direct reports but can be as needed. *Various*

UX Team Members

- **Team Lead/Co Lead:** Schedules, leads, and sends reminders for weekly team stand up meetings. Can be an individual contributor (IC) as well. Writes or delegates the writing of user stories in Github when design is sent to production. Reports to Principal UX Manager.
- **UX Researchers (IC):** Plans, conducts, and reports on UX Research for project. Accesses Research Operations program to recruit participants for studies. Reports to Team Lead/Co Lead. *Various*
- **UX Designers (IC):** Designs based on user research as reported by UX Researchers. Reports to Team Lead/Co Lead. *Various*
- **Other UX Roles As Needed (IC):** Content Strategists, UX Writers, and any other UX-oriented roles who contribute their core competencies as needed. Reports to Team Lead/Co Lead. *Various*

Dev Team Members

- **Front End, Back End, Full Stack Devs:** Assigned issues by Team Lead/Co Lead or designate to develop design work. Uses established frameworks that meet the needs of technical specifications.

* Note: Any team member can transfer roles at any time. There is full support for exploring different roles for professional development. Please communicate role changes with teammates and leadership as needed.

Scope
What's in scope
Describe what definitely needs to be worked on and why.

- No code website created in Google sites to facilitate the onboarding process and provide a place to hold information
- Evergreen onboarding information
- Links to project resources in Slack and GitHub

What might be in scope
Often, there are those 'maybe areas and topics' — list them and describe conditions under which they could be included (e.g. if we have time, if we find out enough evidence in user research, etc.)

- Link to register as volunteer
- Onboarding information & documentation
- Provide instructions for the onboarding process
- Current and historical information about the Orcasound organization and its partners
- Links to tools used on the projects and links to create accounts for these tools.
- Description of requirements for Lead & Contributor roles
- Descriptions of all ongoing projects within the Orcasound UX Team
- FAQ for new volunteers
- Job description for all teams within Orcasound (UX/UI, Devs & others)
- Information for all departments within Orcasound
- Community rules/Code of Conduct for working with Orcasound as a volunteer
- Volunteer feedback form for submission
- Link to main Orcasound website and social media links

What's not in scope
Describe what the design team should not challenge (e.g. hard technical constraints, change of CMS, major design overhauls during a platform migration project, etc.)
[Note: I use this one more as a guide to understand which topics will be hard to change, which things shall be taken as project constraints, and what the business values as a status quo. However, in practice, if you make some key discoveries which could significantly help the product and you have a strong rationale for them, everything can be challenged.]

- Current status of projects

Dependencies
Are there any other teams, people, technology, or anything else that the success of this project is dependent on? Describe them.

- Google sites is a no code website builder so the functionalities are limited
- Introductory project info from the Principal UX Manager

Risks
List risks and caveats that need to be considered.
E.g., What are the risks to the success of this project? What would happen if we don't meet the deadline?

The experience of joining Orcasound as a volunteer will continue to vary until the website becomes actively used by volunteers to onboard and access team resources

Deliverables
- Presentation to the UX General Team meeting when complete
- Promotion on the #general Slack channel for all members when complete

Communication
What communication tools will you use and what for? (Email vs Slack vs JIRA vs Zoom, etc.)
Slack channel - #ux-onboarding-site

Slack Channel: [#ux-onboarding-team](#)

Shared data
Where is the project space/folder and all the materials relevant to the project? Does everyone have access? If not, who will make sure everyone has it?
- Project folder: https://drive.google.com/drive/folders/1dsJOwe2sIo0PgwOpv1M2y3jnESILkUNt?usp=drive_link
- GitHub Product Repo: https://github.com/orcasound/product
  - GitHub project: https://github.com/orgs/orcasound/projects/28

Additional notes
If there is something else, specific to this project, state it here.

UX Project Resources: Link to GitHub wiki here