

# ICONIQ

*Board Reporting Guide - Engineering*

*April 2021*

# ICONIQ Capital, LLC

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# Engineering Metrics and OKRs

	Key Metrics	Actuals	FY21 Targets
R&D Spend	 % and \$ Spend on Tools & Technology		
	 % and \$ Spend on Headcount		
People	 Engineering Headcount		
	 Attrition Rate		
Efficiency	 Lead Time for Changes		
	 # of Updates / Releases		
	 Developer Satisfaction		
Code Quality	 Cost of Poor Quality (COPQ)		
	 # Critical Defects		
	 Service Uptime		

*Placeholder for Annual Engineering OKRs*

# **Engineering Allocation**

Hiring Update

Engineering Efficiency

# Engineering Allocation

Last Quarter

Current Quarter

Next Quarter

Next 2-3 Quarters

## New Capabilities

*Examples: Adding a new product, adding a new feature or sub-feature, supporting a new platform or partner application*

## Quality Improvements

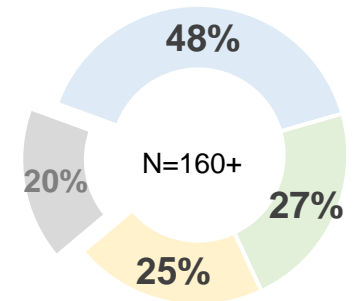
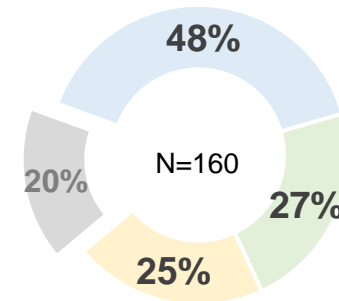
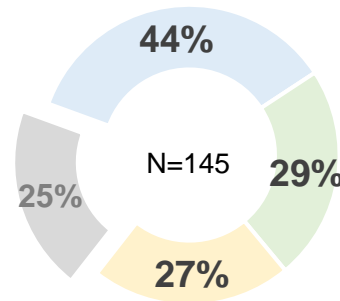
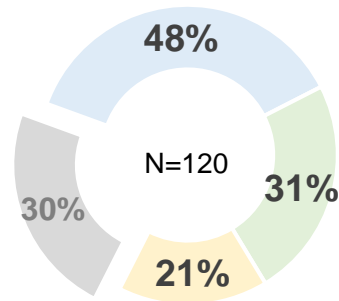
*Examples: Customer requested improvements, better performance and resource utilization, iterations to improve adoption, increased product reliability, improved security*

## Internal Productivity

*Examples: Better developer tooling, testing automation, code restructuring, framework upgrades, work to reduce size of KTLO bucket in the future*

## Engineer Allocations

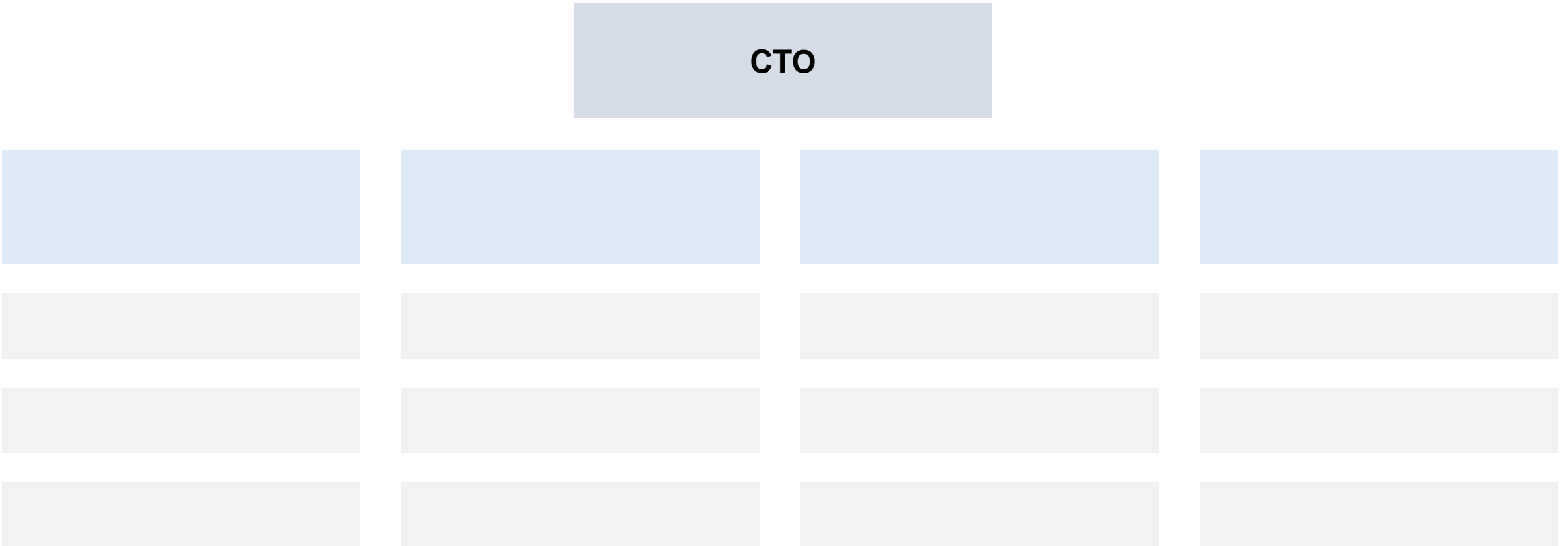
■ Keep the lights on (KTLO)



Engineering Allocation  
**Hiring Update**  
Engineering Efficiency

# 12-Month Forward Org Chart

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# Open Leadership Positions and Key Expertise Gaps

## Open Positions (Director and above)

	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Position A				
Position B				
Position C				
Position D				



## Key Expertise Gaps

- Testing
- Machine learning
- Native client engineers



# Recent Hiring Wins

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**Name**

*Role*

*Prior Experience*



**Name**

*Role*

*Prior Experience*



**Name**

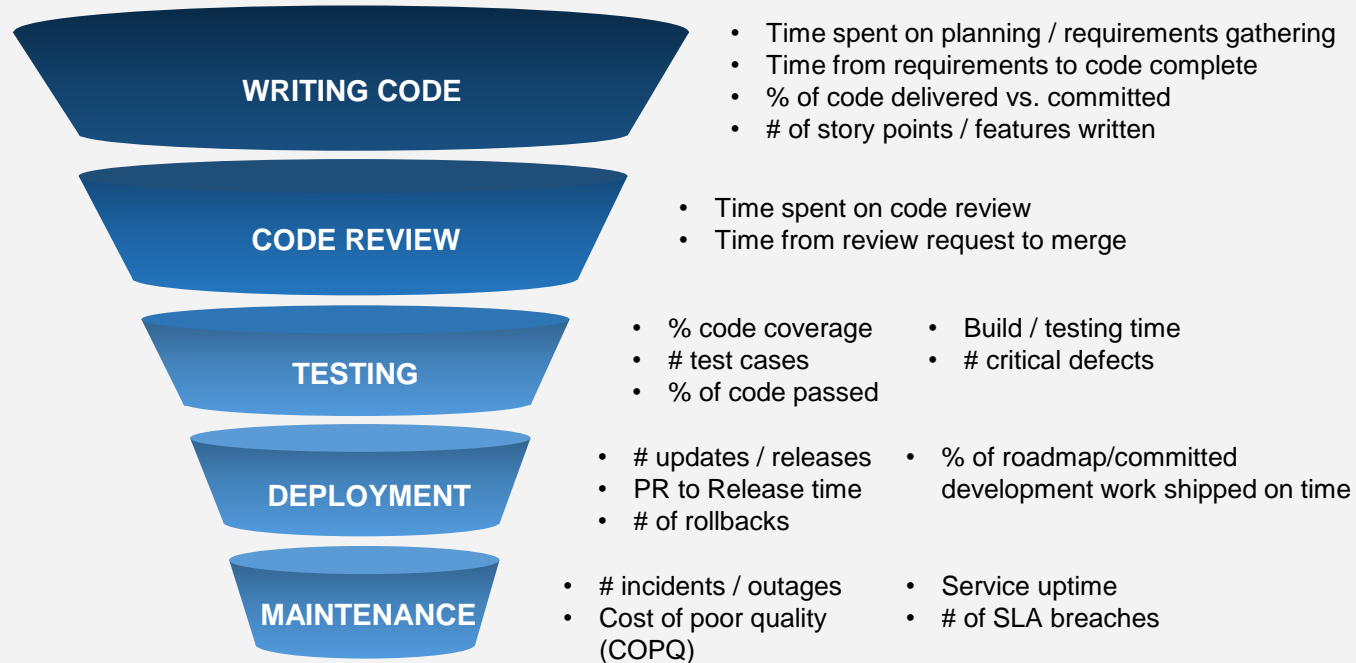
*Role*

*Prior Experience*

Engineering Allocation  
Hiring Update  
**Engineering Efficiency**

# Developer Productivity

## EXAMPLE DEVELOPER PRODUCTIVITY METRICS



## BEST PRACTICES

- Developer efficiency can be viewed similar to a sales funnel, with key **metrics that can be tracked at each stage**
- Start by **picking 3 metrics** that are most relevant and critical for your teams
- Rather than tracking every single metric, it's most important to start **building the muscle of reporting and improving on these metrics over time**
- **All metrics listed here are suggestions;** please let us know if you have different metrics you like to track and report on

# Developer Satisfaction

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Metrics	Actuals	Trending (→ ↗ ↘)	Notes
<b>Developer Satisfaction</b> <i>e.g., I have the tools and processes to get my job done, I see myself working here in 6 months</i>			
<b>Attrition Rate</b>			

[Sample Developer Satisfaction Survey](#)

# Developer Productivity – Other Metrics

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Metrics	Actuals	Trending (→ ↗ ↘)	Notes
R&D as % of Revenue			
Revenue / Infrastructure Cost			
Revenue / # Engineers			

# Development Bottlenecks / Challenges

	<i>Bottlenecks</i>	<i>Remediations</i>	<i>Timing</i>
1	ML Training Time	Move to TPUs	Q1
2	Slow Experiment Tracking	Move from spreadsheets	Q1
3	Builds Taking a Long Time	Delete misfiring tests	Q1
4	Onboarding New Engineers	Write more documentation	Q2