



# Customer Solutions Team

## Career & Competency Frameworks

V1.0 - November 2022

# AGENDA

- Objective
- Career Framework
- Role Summaries
- Role Profiles
- Competency Framework
- FAQ

## OBJECTIVE

- Whatfix is growing and the opportunities for employees to develop and scale with the organization are growing as well.
- We have created Career and Competency Frameworks to clearly outline the role expectations at different levels and the capabilities required to excel in each role.

# Career Framework

- **Defines the career growth path within the Customer Solutions function**
- Movement to the next level happens only after an individual starts to exhibit traits and skills for the next level (and other variables like position vacancy and business needs)
- Flatter structure - levels change only when there is a significant increase in scope and impact, not based on tenure
- 2 Career Tracks identified for employee growth:
  - Individual Contributor (IC)
  - People Manager

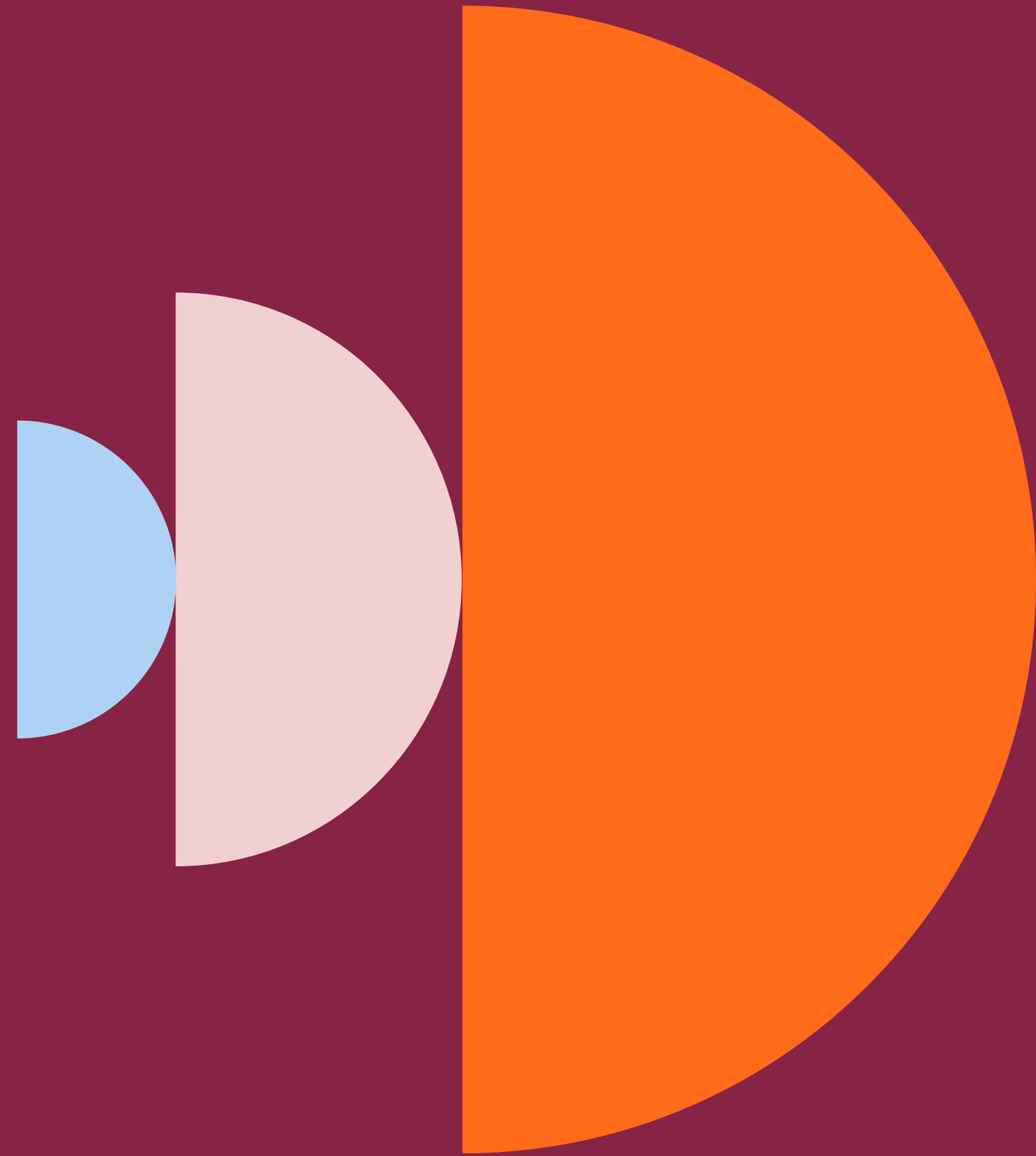
# Roles Profiles

- **Expectations defined at each level**
- Each level builds on the expectations from previous level
- Example : EL2 responsibilities include EL1 role + additional expectations
- All people managers should also shoulder some IC / independent functional goals apart from managing people and teams
- Movement to the next level happens only after an individual starts performing at the next level
- Role expectations will evolve as the business context changes

# Competency Framework

- **Knowledge, skills and attitudes required at each level**
- Required proficiency of each competency increases as one moves up the levels
- Movement to the next level happens only after an individual starts exhibiting behaviours at the next level
- Competency framework to be referred to at the time of hiring, developing IDPs, performance assessment, and movement from one level to another
- Competencies and required proficiency levels will evolve as the business context changes

# CAREER FRAMEWORK

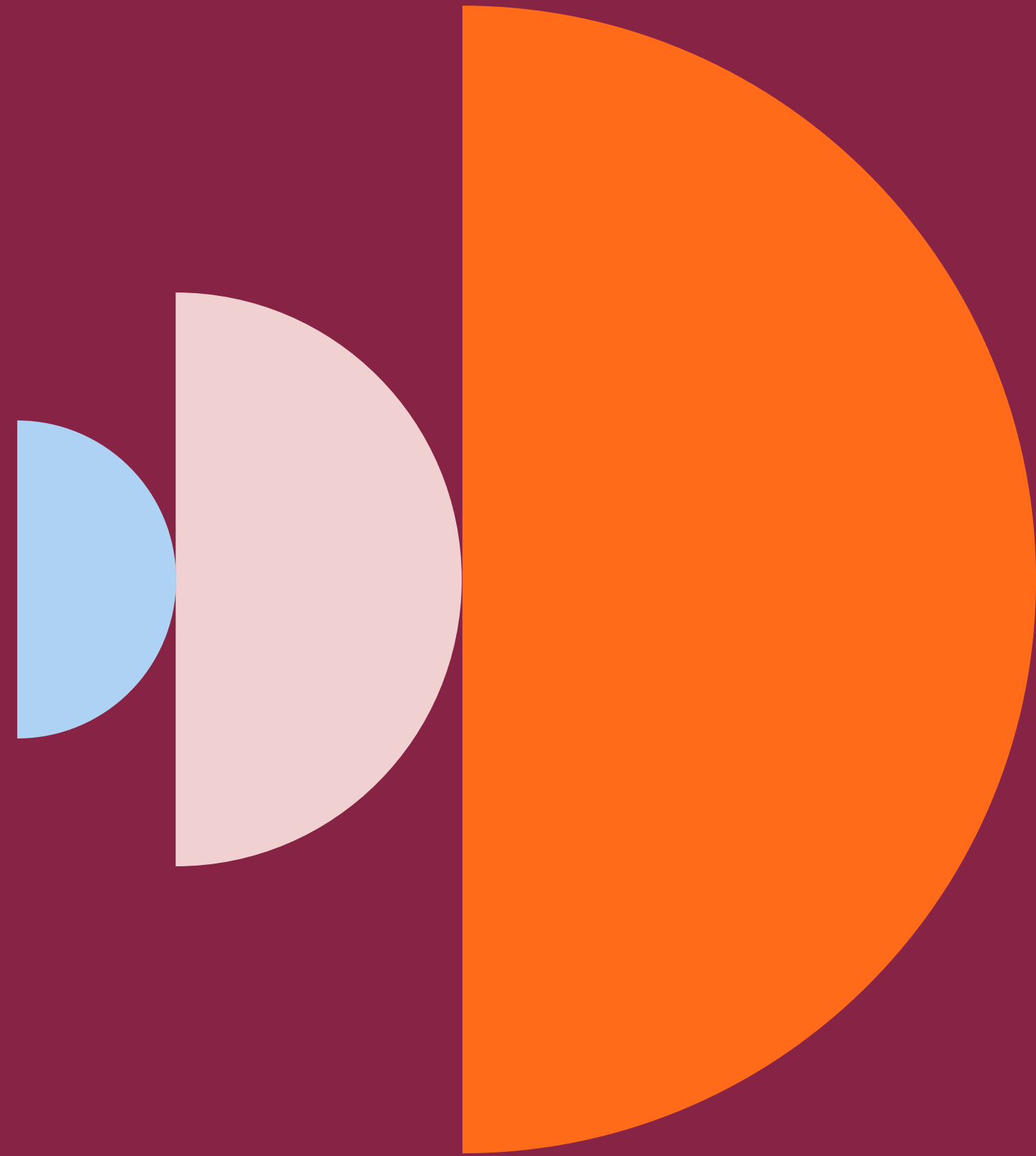


# Career Framework

Level	IC Track	Level	Manager Track
P0	Solutions Engineer - Intern		
P1	Solutions Engineer		
P2	Senior Solutions Engineer		
P3	Lead - Solutions Engineer		
P4	Principal Solutions Engineer	M2	Manager - Customer Solutions
		M3	Senior Manager - Customer Solutions
		M3A	Associate Director - Customer Solutions
P5	Functional Consultant	M4	Director - Customer Solutions
		M5	Senior Director - Customer Solutions



# ROLE SUMMARIES



# P1 - Solutions Engineer

You deliver value to customers by addressing technical challenges and constraints, and helping the customer realize value of Whatfix service offerings within their ecosystem. You leverage your Whatfix product knowledge to provide superior implementation experience to customers across applications and interfaces.

## 01 Problem Solving

- Address issues for customers, Digital Adoptions Specialists, Customer Success Managers
- Empower customer to maximize Whatfix potential by acting as a Digital Adoption Specialist

## 02 Solutioning

- Configure and implement all the features of Whatfix applications
- Leverage product expertise to define the blueprint for Whatfix implementation for customers

## P2 - Senior Solutions Engineer

You are a strategic partner to the Project Managers, Digital Adoption Specialists and Customer Success Managers. You provide technical solutioning for complex use cases to meet customer objectives. You assume ownership for assigned product features and drive excellence in customer onboarding experience.

### 01 Problem Solving

- Address issues for customers, Digital Adoptions Specialists, Customer Success Managers
- Empower customer to maximize Whatfix potential by acting as a Digital Adoption Specialist

### 02 Solutioning

- Configure and implement all the features of Whatfix applications
- Leverage product expertise to define the blueprint for Whatfix implementation for customers

### 03 Onboarding

- Understand customer requirements to configure customer apps and onboard them onto Whatfix
- Collaborate with PMs & CSMs to build for customer use cases & meet their business objectives

### 04 Product Ownership

- Act as the product owner with assigned product features for accounts
- Influence the overall product development roadmap

# P3 - Lead - Solutions Engineer

You possess expertise in onboarding customer applications & platforms, technical solutioning for complex use cases, and addressing issues with satisfactory resolution. You understand the customer's business & IT landscape to hyper-customize the solutions and build their trust in Whatfix support team to meet their needs.

## 01 Solutioning

- Configure and implement all the features of Whatfix applications
- Leverage product expertise to define the blueprint for Whatfix implementation for customers

## 02 Onboarding

- Understand customer requirements to configure customer apps & onboard them onto Whatfix
- Collaborate with PMs & CSMs to build for customer use cases & meet their business objectives

## 03 Product Ownership

- Act as the product owner with assigned product features for accounts
- Influence the overall product development roadmap

## 04 Technical A/C Management

- Take technical account ownership for defined/assigned accounts
- Understand customer biz landscape to strengthen & expand their association with Whatfix

# P4 - Principal Solutions Engineer

You are a subject matter expert in certain solution areas / industry verticals / regions of operation. You leverage your in-depth product knowledge & a wide base of solution engineering experience to address crisis situations, address technical complexities in red accounts, & develop the team to build their solutioning skill-set. You are a consultant in your domain of expertise, providing insights & inputs to pan-Whatfix teams working in that domain.

## 01 Product Ownership

- Act as the product owner with assigned product features for accounts
- Influence the overall product development roadmap

## 02 Technical A/C Management

- Take technical account ownership for defined/assigned accounts
- Understand customer biz landscape to strengthen & expand their association with Whatfix

## 03 Functional Consulting

- Understand customer domain as an expert to consult & provide solutions to maximize engagement
- Provide expert insights on how Whatfix can address customer pain points & challenges

## 04 Delivery Management

- Manage cross-functional deliveries
- Work on important POCs in pre-sales stage as needed

# M2 - Manager - Customer Solutions

You possess expertise in solutioning for assigned product features and take ownership for technical implementation/ roadmap for assigned accounts. You display managerial excellence by not only driving all employee process for your reports, but also supporting their growth and development within and outside the team.

## 01 Product Ownership

- Act as the product owner with assigned product features for accounts
- Influence the overall product development roadmap

## 02 Technical A/C Management

- Take technical account ownership for defined/ assigned accounts
- Understand customer biz landscape to strengthen & expand their association with Whatfix

## 03 People Management

- Lead the Solution POD area to successfully meet BU & Org objectives
- Drive excellence through all employee processes  
Develop the team's capabilities to help them grow

## 04 Delivery Management

- Manage cross-functional deliveries for programs

# M3 - Senior Manager - Customer Solutions

You are a seasoned people manager with deep insights on customer solutioning across industries within Whatfix. You leverage your knowledge & expertise to formulate and implement short term strategies for the Customer Solutions function, and enable your team to implement the same.

## 01 Product Ownership

- Act as the product owner with assigned product features for accounts
- Influence the overall product development roadmap

## 02 Technical A/C Management

- Take technical account ownership for defined/assigned accounts
- Understand customer biz landscape to strengthen & expand their association with Whatfix

## 03 People Management

- Manage a Solution POD area
- Implement short-term strategies for the function
- Drive excellence through all employee processes
- Develop the team's capabilities to help them grow

## 04 Delivery Management

- Manage cross-functional deliveries for programs

# M3A - Associate Director - Customer Solutions

You are a leader for assigned sub-teams / industry verticals / solutions areas / region of operation, and you leverage your expertise to influence the product roadmap your domain(s). You provide reliable and repeatable solutions to the customers/ cases you manage. You drive your managers to build high-performance teams to meet the current & future business needs of Whatfix. You also role model the leadership behaviours you wish to build within your team(s).

## 01 Product Ownership

- Act as the product owner with assigned product features for accounts
- Influence the overall product development roadmap

## 02 Solutioning

- Configure and implement all the features of Whatfix applications
- Leverage product expertise to define the blueprint for Whatfix implementation for customers

## 03 People Management

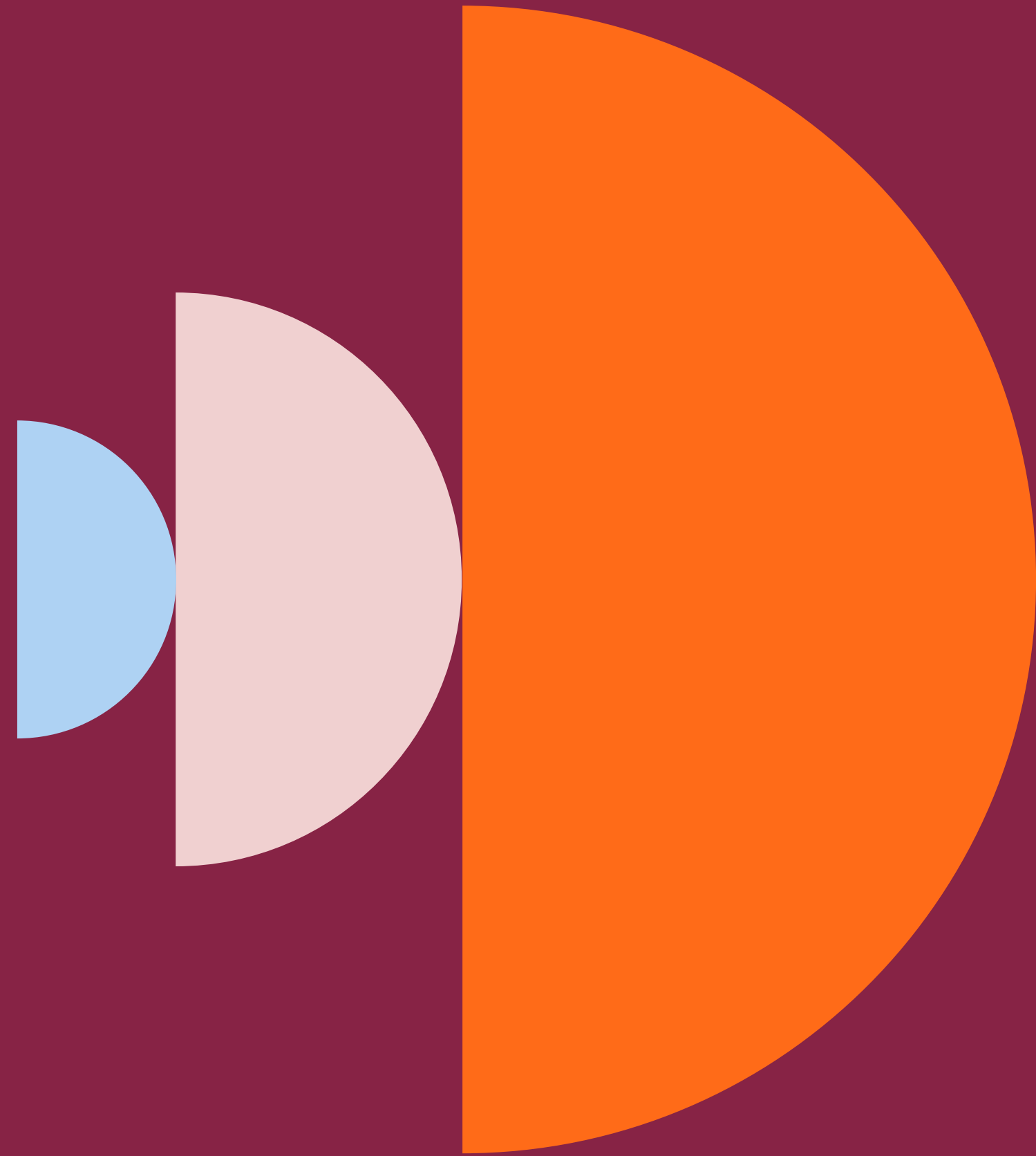
- Lead the team to successfully meet BU & Org objectives
- Drive excellence through all employee processes
- Develop the team's capabilities to help them grow further

## 04 Delivery Management

- Manage cross-functional delivery programs
- Own coordination & triage with Product & Engg teams
- Share sales/pre-sales engg gaps with the delivery teams



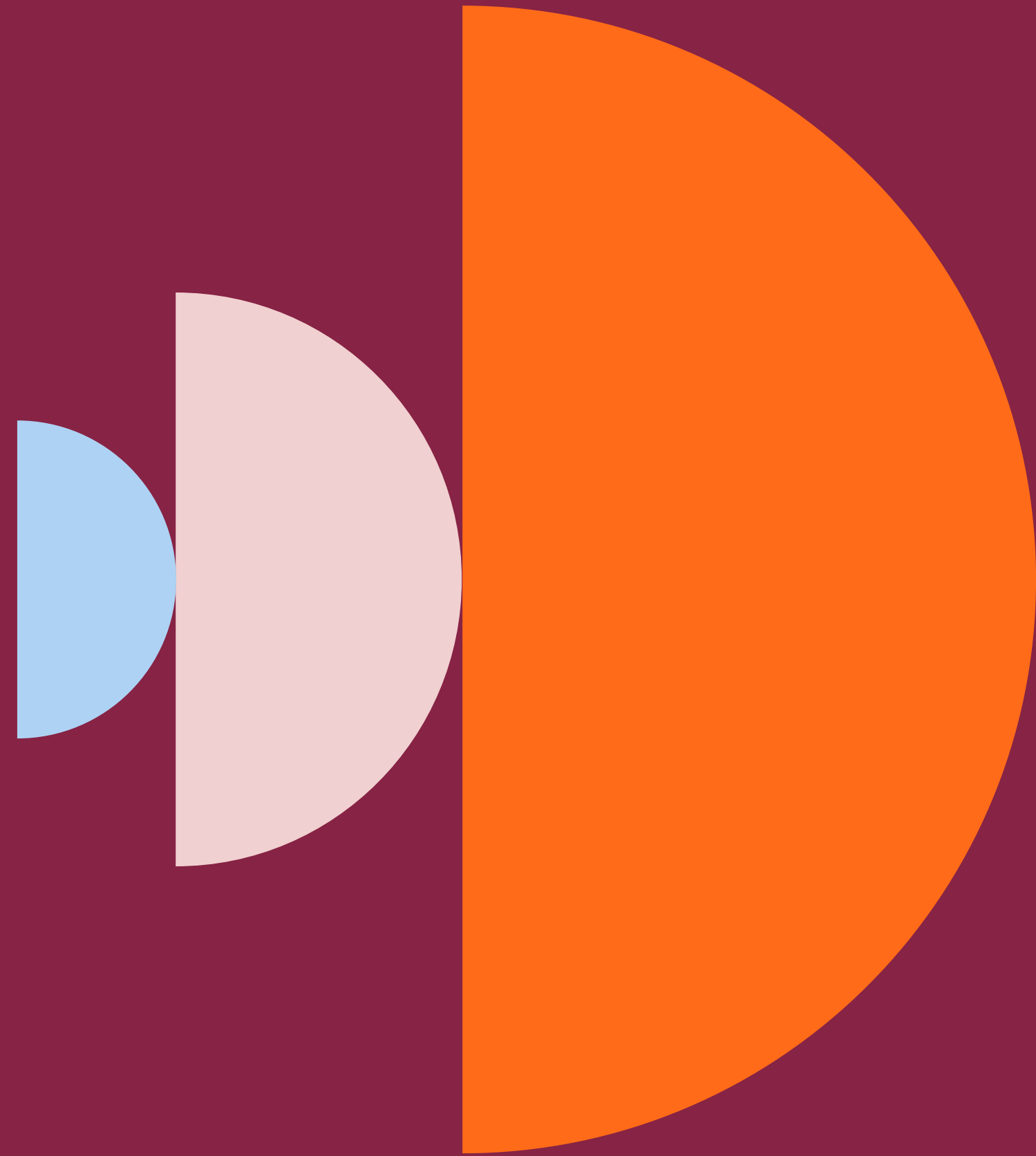
# ROLE PROFILES





**[Click Here](#)** to access the  
detailed Role Profiles

# COMPETENCY FRAMEWORK



# Competency Framework

## COMPETENCIES

### What They Are

**Knowledge, Skills and Attitudes** required to do a job well - we have identified competencies required at different levels within the Customer Solutions team

## FRAMEWORK

### How it is structured

Segmented into **Beginner >> Intermediate >> Advance** proficiency levels, the framework outlines the competencies required for both IC and People Manager tracks

## BEHAVIOURS

### Indicators of Competencies

The framework defines the competencies as behavioural indicators - '**how will I know whether I possess a competency**'

# Customer Solutions Competency Framework

## Customer Centricity

Driven with high focus on managing customers and their needs, as well as developing and sustaining productive customer relationships

## Problem Solving

Employ an analytical and creative approach to address problems, while drawing on individual & collective skills, knowledge & experience



## Drive For Results

Strive for success by establishing challenging yet achievable performance goals, aligning systems & processes to deliver superior customer experience

## Collaboration

Collaborate with colleagues to achieve results in alignment with the overall business objective

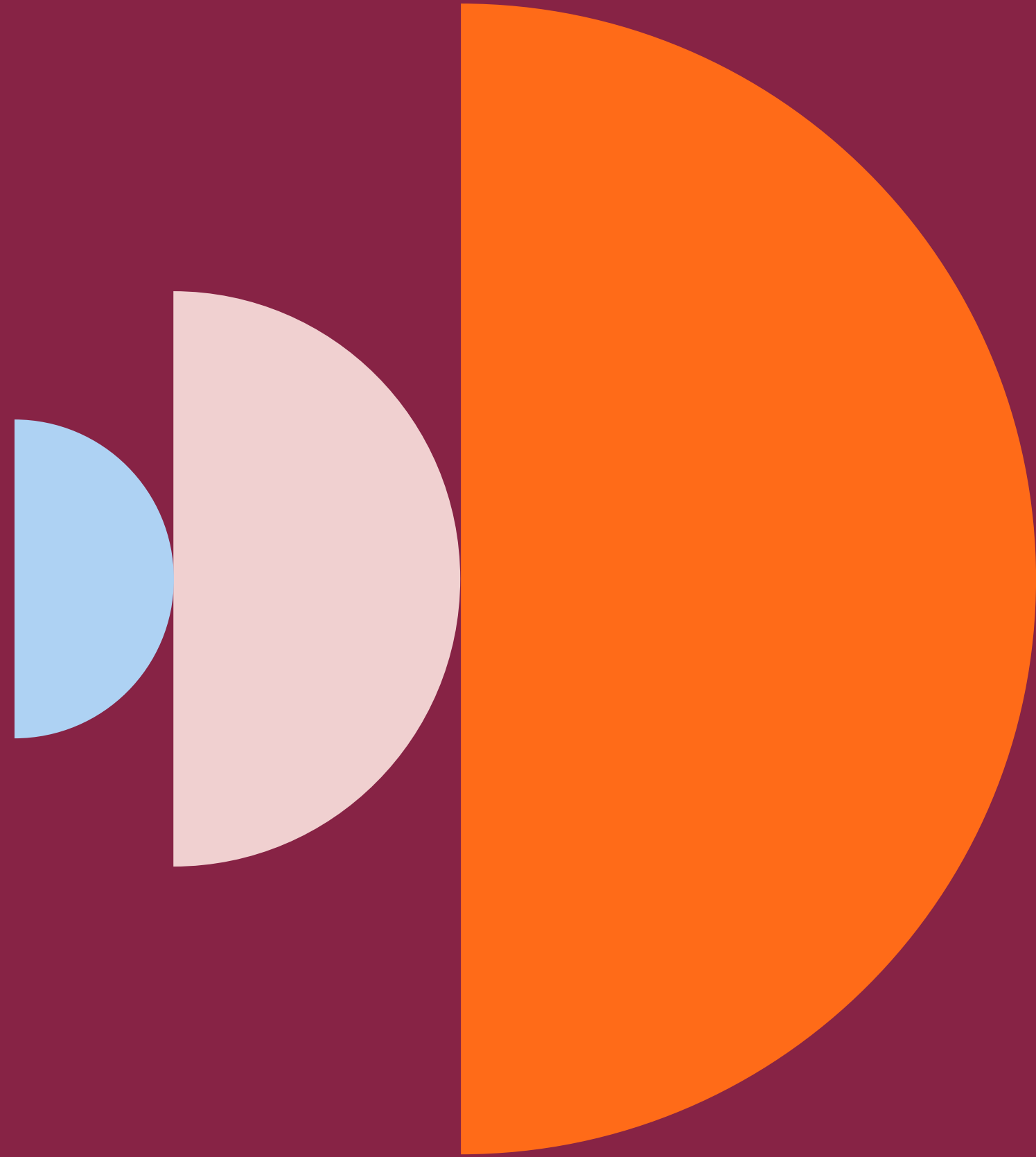
## Strategic Communication

Clearly convey information & ideas through different modes to individuals or groups, in a manner that engages & helps them understand & retain the message



**Click Here** to access the  
detailed Competency  
Framework

FAQ



# FAQ - Career & Competency Framework

## **How should I interpret the career framework?**

Career Framework gives an outline of overall progression of different roles, to build a team that can meet organizational requirements few years from today. To start with, the framework will guide hiring decisions - what skills are hired at what levels. Along with performance & competency framework, it would later also guide the employee progression & development decisions.

## **How should I interpret the competency framework?**

The framework outlines different behaviours an individual needs to exhibit at different levels and in different roles in the Customer Solutions team. The framework will guide which behaviours an individual must possess to get hired for a particular role, must exhibit to do their job well, must develop to grow to the next level.



## FAQ - Role Profiles

**My current job role has more/less responsibilities than what is mentioned in the role profile. So what does that mean for my role?**

Role Profiles mention an overview of role & responsibilities. There might be some activities - tactical tasks / region or domain-specific tasks / special projects or interventions - that won't be mentioned here.

There might be some activities that are currently not a part of your role but will become eventually as you grow within the same role, and as the business grows. Have a role-specific discussion with your manager for details and clarification on the expectations from your role right now & in the future.

Thank you!

