

Analyst Relations

Career & Competency Frameworks

Update History

Version	Date	Updated by	Remarks
1.0	29 April 2024	Tathagata Das Sarma	Frameworks created and published
1.1			

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 Analyst Relations Team**
- **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

Descriptive Titles

Why is Whatfix adopting a new nomenclature philosophy?

- We don't want titles to be the anchors of growth. We want to enable a mindset shift, wherein the employee moves away from *focus on titles* to *focus on impact & scope*
- In other words, growth from 1 level to another should mean increased scope / responsibilities / larger impact on the team or the org, and not simply a title change
- Whatfix wants to build a performance-driven culture where capable people can continuously grow by taking up bigger roles vs based on seniority/tenure
- In Whatfix's growth journey, this is the right stage to make this shift, which will not only provide role clarity to the employees but also highlight the correct measures of growth and success within the org

What is the new approach?

- To adopt the Descriptive Titles structure of Whatfix, moving away from standard corporate titles
- Corporate Titles are traditionally used nomenclature like Manager, Director, Executive, etc.
- Descriptive Titles are nomenclature that describe the role an individual is doing
- **How to read it?**
 - **Level** - example: A1
 - **Title** - example: Analyst Relations Specialist

Role & Responsibilities

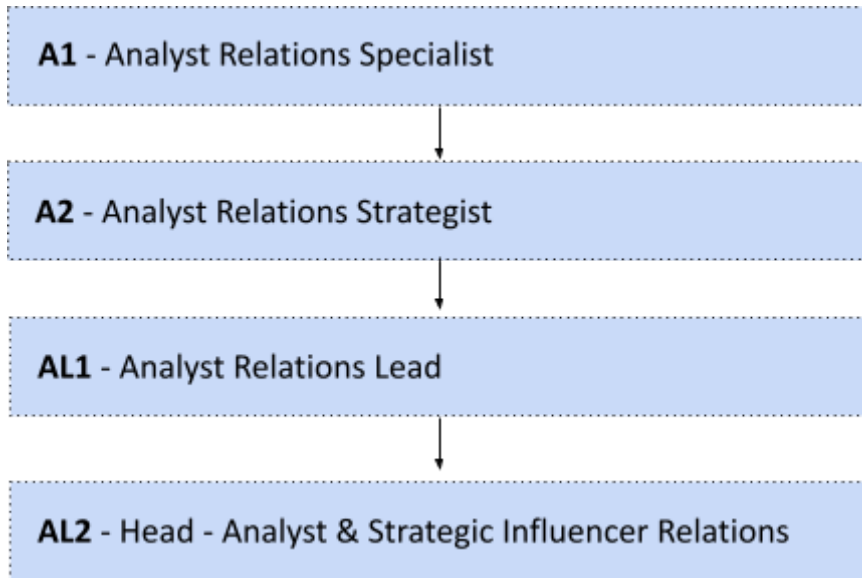
- **Expectations defined at each level**
- Each level builds on the expectations from the previous level
 - Example : A2 responsibilities include A1 role + additional expectations
- **All people managers should be hands-on - i.e. proficient in the core IC work of their domain**
- Movement to the next 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
- **How to read it?**
 - **Competency** - the required knowledge/skill/attitude (example: communication)
 - **Behavioural Indicators** - evidence of proficiency (example: making impactful presentations and addressing audience queries successfully)
- 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.

Analyst Relations

CAREER FRAMEWORK



COMPETENCY FRAMEWORK



A1

Analyst Relations Specialist

Role Summary	You are responsible for foundational tasks within the function, primarily focused on executing tactical activities to support AR initiatives.
KRA	Activities
Operations	<ul style="list-style-type: none"> ● Maintain and Update AR Documentation: <ul style="list-style-type: none"> ○ Keep analyst profiles and competitive landscape information up-to-date. ○ Ensure accurate and relevant data is available for briefings and interactions. ● Assist & support senior AR team members by preparing briefings, and presentations, and responding to analyst inquiries. ● Monitor and Analyze Analyst Reports: <ul style="list-style-type: none"> ○ Stay informed about industry trends by analyzing reports and publications from analysts. ○ Extract insights relevant to the company's positioning and strategy. ● Contribute to AR Databases and Resources: <ul style="list-style-type: none"> ○ Help build and maintain databases containing information about industry analysts. ○ Ensure data accuracy and completeness. ● Research and Track Key Industry Analysts: <ul style="list-style-type: none"> ○ Track relevant analysts and their activities. ○ Understand their focus areas and preferences. ● Assist in organizing and participating in Industry Analyst Events such as briefings, conferences, and webinars. ● Collaborate with wider marketing teams to align AR efforts with overall Marketing Campaigns. ● Maintain Analyst Knowledge Repository - Curate and organize relevant information in tools like Highspot, Slack, and Google Drive.
Measurement & Reporting	<ul style="list-style-type: none"> ● Utilize ARInsights Software - Manage interactions, tiering, and projects using ARInsights, a third-party analyst-tracking tool.
Measures of Success for the Role	<ul style="list-style-type: none"> ● Feedback scores from internal and external stakeholders on communication effectiveness. ● Accuracy in maintaining analyst databases and tracking interactions measured by the percentage of up-to-date records and the number of errors found in tracked interactions and reports. ● Timely completion of tasks and adherence to deadlines.

A1 Competencies

Competency	Behavioural Indicators
Industry Knowledge	<ul style="list-style-type: none"> ● Basic understanding of the industry and competitive landscape
Analyst Relations Knowledge	<ul style="list-style-type: none"> ● Basic understanding of AR principles, practices, and best practices
Communication (written & verbal)	<ul style="list-style-type: none"> ● Ability to communicate clearly and concisely ● Active listening skills.
Relationship Management	<ul style="list-style-type: none"> ● Ability to build rapport and maintain positive relationships
Research & Analysis	<ul style="list-style-type: none"> ● Proficient in basic research techniques
Project Management	<ul style="list-style-type: none"> ● Ability to manage basic tasks and deadlines
Organization Skills	<ul style="list-style-type: none"> ● Efficiently manage time and prioritize tasks ● Attention to detail and accuracy in work ● Ability to multitask and meet deadlines

A2

Analyst Relations Strategist

Role Summary	You are responsible for executing the Strategic ARs plan. You collaborate closely with the Analyst Relations Leader and Product Marketing and Product Management to ensure the Whatfix brand is represented fairly in all relevant research reports.
KRA	Activities
Strategy & Operations	<p>In addition to A1 responsibilities,</p> <ul style="list-style-type: none"> ● Support the analyst relations strategy and a variety of research and independent analyst relationships that influence Whatfix's success ● Execute analyst relations projects and create, maintain and influence analyst relationships that contribute to the overall success of the team ● Deliver ongoing AR program activities such as analyst briefings, analyst inquiries, reporting and other core program tactics ● Schedule and prepare Whatfix spokespeople for analyst inquiry and briefings

	<ul style="list-style-type: none"> ● Plan and lead effective strategy sessions (e.g., SAS days) with select analysts ● Proactively and simultaneously manage multiple vendor ratings in key reports such as Gartner Market Guides, Forrester Waves, Everest PEAK Matrix and IDC MarketScapes ● Prioritize and manage incoming requests for information, research review, and customer references ● Respond to, serve, and manage internal requests for industry analyst publications, research, and event support ● Produce and/or edit AR content including presentations, research notes, and other related materials ● Provide constructive guidance on briefing decks, questionnaires, and analyst Q&A to Whatfix spokespeople
Measurement & Reporting	<p>In addition to A1 responsibilities,</p> <ul style="list-style-type: none"> ● Execute AR reporting and measurement programs ● Track and report analyst interactions, coverage, and progress ● Develop and manage an internal analyst relations newsletter ● Read, distribute and provide insight on relevant published research to teams across Whatfix
Measures of Success for the Role	<ul style="list-style-type: none"> ● Development and implementation of strategic AR plans that align with organizational objectives. ● Number of analyst briefings and meetings held, especially with Tier 1s ● Number of positive analyst mentions, frequency of favourable analyst commentary ● Analyst sentiment analysis: Track the overall tone of analyst reports and mentions (positive, neutral, or negative). Look for an upward trend in positive sentiment over time. ● Improvement in analyst ratings/dot placement in competitive reports

A2 Competencies

Competency	Behavioural Indicators
Industry Knowledge	<ul style="list-style-type: none"> ● Strong understanding of the industry and competitive landscape
Analyst Relations Knowledge	<ul style="list-style-type: none"> ● Proficient understanding of AR principles, practices, and best practices
Communication (written & verbal)	<ul style="list-style-type: none"> ● Ability to craft compelling written and verbal communication for diverse audiences ● Exceptional interpersonal, verbal, and written communication skills with the
Relationship Management	<ul style="list-style-type: none"> ● Ability to build strong, trust-based relationships with analysts and influencers ● Ability to build confidence across multiple functions and levels of the organization

Research & Analysis	<ul style="list-style-type: none"> ● Ability to conduct in-depth research and analyze data to identify insights
Project Management	<ul style="list-style-type: none"> ● Ability to plan, execute, and manage multiple projects with competing priorities ● Strong organizational and project management skills, excellent attention to detail, and an ability to handle numerous fast-paced projects simultaneously
Leadership Skills	<ul style="list-style-type: none"> ● Ability to mentor and motivate junior team members

AL1

Analyst Relations Lead

Role Summary	You are responsible for the strategy and implementation of the industry analyst relations program, cultivating strategic relationships and creating mindshare with key analysts through education, customer references, and two-way communication around key product updates.
KRA	Activities
Functional Leadership	<ul style="list-style-type: none"> ● Play a critical role in Whatfix achieving its long-term growth vision by helping shape analyst perceptions of the outcomes we enable customers to achieve and how we serve customers in ways other companies can't. ● Collaborate closely with Product Marketing, Product Management, and key executives to meet organizational objectives.
Strategy	<p>In addition to A2 responsibilities,</p> <ul style="list-style-type: none"> ● Develop, execute, and manage the company's industry analyst relations strategy and plan to support measurable business objectives. ● Establish key KPIs, strategy, and industry benchmarks to position Whatfix as a leader across markets and in industry analyst reports, hype cycles and through inbound inquiries. ● Drive alignment with sales, marketing, and product teams to maximize program impact. ● Create and nurture strong, positive and collaborative relationships with industry analysts, technology influencers, and thought leaders, serving as a key, centralized contact point. ● Establish and maintain regular communication with analysts and influencers via multiple channels, which you will develop, to engage and educate these audiences on Whatfix's strategy, roadmap, and product updates.
Operations	<p>In addition to A2 responsibilities,</p> <ul style="list-style-type: none"> ● Manage all AR operations, including rationalizing agreements and budgets to support consistent analyst strategy days, quarterly briefings, inbound and outbound inquiries, and research requests. Ensure that contracted services are fully utilized.

	<ul style="list-style-type: none"> Plan, schedule, and manage analyst program activities such as participation in analyst research, conferences, advisory events, demos, briefings, inquiries, and reporting. Prioritize and manage incoming analyst requests for information, research support, research reviews, customer references, and event speakers. Respond to, serve, and manage internal requests for industry analyst interactions, publications, research, events support and other requests. Monitor competitive coverage by industry analysts to support product and product marketing leaders' refinement of product and market positioning, and educate internal audiences on the evolving technology landscape. Ensure analyst advice is communicated to key internal stakeholders and that assets mentioning Whatfix are leveraged appropriately to help build market awareness, drive demand, and enable the selling process.
Team Management	<ul style="list-style-type: none"> As a player-coach, mentor team members on the job, help resolve their challenges & address queries Support onboarding and ramp-up of new hires Share knowledge and AR best practices with the team members to support their functional enablement
Measures of Success for the Role	<p>In addition to A2 measures of success</p> <ul style="list-style-type: none"> Engagement and Relationship Quality: Number of meetings, briefings, and interactions with analysts and influencers per quarter (e.g., 10 interactions per quarter) and average feedback score on the quality of these relationships (e.g., 4.5 out of 5). Impact Assessment: Number of organizational objectives positively influenced by AR initiatives (e.g., 5 key objectives supported annually). Collaboration Index: Number of joint projects or initiatives with cross-functional teams

AL1 Competencies

Competency	Behavioural Indicators
Industry Knowledge	<ul style="list-style-type: none"> Deep understanding of the industry and competitive landscape, including emerging trends
Analyst Relations Knowledge	<ul style="list-style-type: none"> Expert understanding of AR principles, practices, best practices, and measurement methodologies
Communication (written & verbal)	<ul style="list-style-type: none"> Ability to tailor communication to specific audiences and effectively deliver presentations

Relationship Management	<ul style="list-style-type: none"> ● Ability to mentor and coach junior team members in building relationships
Research & Analysis	<ul style="list-style-type: none"> ● Ability to translate research findings into actionable recommendations
Project Management	<ul style="list-style-type: none"> ● Ability to delegate tasks effectively and monitor team progress
Leadership Skills	<ul style="list-style-type: none"> ● Ability to provide strategic direction, and mentor junior team members to achieve program goals

AL2

Head - Analyst & Strategic Influencer Relations

Role Summary	You are a strategist and an orchestrator, ensuring that all relevant internal (executives, stakeholders and so on) and external (industry analysts) collaborate on and execute in alignment with the analyst relations strategy, as well as internal and external initiatives, as appropriate.
KRA	Activities
Functional Leadership	<ul style="list-style-type: none"> ● Build and oversee the end-to-end execution of the analyst relations strategy, and corresponding programs and initiatives. ● Serve as the liaison between industry analysts and the company while maintaining professional decorum, attention to detail, timeliness, and mutually and strategically beneficial engagements. ● Assume the role of spokesperson and evangelist on the company's/product's/service's behalf. ● Foster and strengthen relationships with primary, secondary and tertiary analysts to ensure well-rounded engagement, feedback and, ultimately, well-rounded outcomes. ● Champion the vision for the future of analyst relations and its strategic impact on the business, and the market in which it serves.
Strategy	<ul style="list-style-type: none"> ● Develop and deploy analyst relations best practices for program elements, such as inquiry, briefing, events and evaluations, and sharing insights, trends and research. ● Set expectations — based on executive, stakeholder and corporate goals — on what analyst relations can achieve with the resources at hand. ● Identify and develop spokespeople, including executives and subject matter experts, to ensure fluid and deliberate messages are shared and best practices are deployed. ● Collaborate cross-functionally with internal teams to drive outbound engagement and inbound insights in alignment with corporate and analyst relations objectives. ● Illuminate areas of opportunity where analyst relations can provide a competitive advantage.

Operations	<ul style="list-style-type: none"> ● Manage analyst relations operations — specifically, third-party resources such as budget, contracts and tools, in addition to defining, measuring and reporting on metrics/outcomes. ● Define a communications cadence and feedback loop to ensure that the dissemination of analyst insight from engagements and research is shared with the right stakeholders at the right time. ● Orchestrate and execute a best-in-class analyst roundtable/event/summit.
Team Management	<ul style="list-style-type: none"> ● Manage the performance of the analyst relations team, programs and collaboration with other stakeholders.
Measures of Success for the Role	<ul style="list-style-type: none"> ● Performance measures for an analyst relations leader should fall into two categories that impact the business: quantitative and qualitative. ● The quantitative metrics help to measure the analyst relations leader’s impact on the business specific to influencing: <ul style="list-style-type: none"> ○ Pipeline contribution ○ Shortening of sales cycles ○ Increase in win rates ○ Budget management ● The qualitative metrics help validate and illuminate the analyst relations leader’s impact on the business specific to: <ul style="list-style-type: none"> ○ Positive sentiment and/or placement in analyst evaluations ○ Increase in neutral to positive inclusion in analyst reports ○ Incorporation of analyst feedback expertise in internal initiatives, such as product and/or service ideation, message creation, mergers and acquisitions, pricing and packaging, etc.

AL2 Competencies

Competency	Behavioural Indicators
Industry Knowledge	<ul style="list-style-type: none"> ● Extensive understanding of the industry and competitive landscape, including a global perspective
Analyst Relations Knowledge	<ul style="list-style-type: none"> ● Visionary understanding of AR trends, influencer relations, and their application to business goals
Strategic Communication	<ul style="list-style-type: none"> ● Excellent executive-level communications to ensure a focused and valuable interaction with clear next steps. ● Listen keenly to both validate existing hypotheses and uncover new insights. ● Determine when to probe for additional information. ● Deliver clear, compelling and articulate written and verbal communications.

	<ul style="list-style-type: none"> ● Command and sustain attention, and be, ideally, a natural, and an authentic storyteller.
Relationship Management	<ul style="list-style-type: none"> ● Ability to build and manage strategic relationships with key industry influencers beyond analysts
Research & Analysis	<ul style="list-style-type: none"> ● Ability to identify emerging trends and assess their potential impact on the AR program
Project Management	<ul style="list-style-type: none"> ● Strategic prioritization, including project and resource planning and management. ● Ability to develop and manage the AR budget
Leadership Skills	<ul style="list-style-type: none"> ● Ability to inspire and influence senior leadership to adopt AR recommendations ● Consensus builder ● Decisive decision maker ● Persuasive influencer, with the ability to build enthusiasm for new plans ● Self-motivated with the ability to inspire others

Frequently Asked Questions (FAQs)

1) **What should I do next?**

Have a conversation with your manager on role expectations and required competencies, and your development plan to improve and eventually take on more responsibilities as you grow.

2) **How will we map employees in case they want to move to a different Role / Business Unit?**

Employees can transition to other roles within the PMM team if they are interested, the opportunity exists, and there is an employee skill + job requirement match. All such movements will be driven by hiring requirements and individuals' fit into the aspired role. The hiring manager will evaluate, review & decide on the new level.

3) **How often do we revisit the criteria of levels?**

The document is dynamic & all of us are expected to comment/recommend changes to it.

4) **How do we manage career growth expectations for People Managers (TL/Manager/AD etc.) as we are bringing the new framework? Many titles may go off, such as Manager.**

The intent of bringing this framework is to clearly outline the role expectations at different levels and the capabilities required to excel in each role. In this transition, there could be a possibility of roles with overlapping responsibilities getting merged into one or new unique roles getting created. We expect managers to understand the rationale behind the changes and then further communicate to team members.

5) **Will my time to grow to the next level be longer as you have fewer career levels?**

Level-up happens only after an employee can prove that they have already operated at the new scope & demonstrated the impact expected. Level-up does not add additional responsibilities, Level up happens only after additional responsibilities are already handled. It is not mandatory that each & every behaviour is exhibited but needs to prove that all categories (Role summary, KRA, Competencies etc.) are covered.

6) What will be the new level for an individual where already an incumbent exists?

Level-up may still happen, irrespective of the existing incumbents, if the employee has already operated at the new scope & demonstrated the expected impact.

7) How does this help in building my profile/ career? What will be my LinkedIn designation?

The framework aims at charting out clearer expectations from each level and provides visibility to an employee on how they can grow within Whatfix. Once your new role gets communicated to you by your HRBP, you can update your LinkedIn designation accordingly.

8) What will be my mapping as per the new Career Framework? Will I be mapped to a higher level or a lower level?

This is a calibration to a new framework, and no up/down movement is a promotion/demotion - we are simply moving to a new way of structuring the team and role expectations. The new level (can be higher or lower) will be governed by the career & competency frameworks defined above, and further depend on the assessment conducted by HR Leadership. The manager will communicate the new level to the employee and your HRBP will also release a formal letter communicating the changes once the overall exercise is completed.

9) Am I eligible to apply for an IJP for a higher or lower-level position in another BU?

Yes, you will continue to be eligible for IJP subject to meeting the IJP eligibility criteria.

10) If I do not agree with the proposed level / designation, what should I do next?

You can assess yourself against the aspired role and provide details to your HRBP & manager as to why you should be mapped to another (higher/lower) role. They will reassess your case internally and let you know the final decision.