

# Sales Development Team

## Career & Competency Frameworks

### Update History

Version	Date	Updated by	Remarks
1.0	19 October 2023	Nivedita Bakshi	Framework created & published
1.1	4 April 2024	Nivedita Bakshi	Updated R&R and Descriptive Titles

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 SD 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
- **How to read it?**
  - **Level** - example : E1
  - **Title** - example : Sales Development Representative

## 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 organization.

### 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, while ***Descriptive Titles*** are nomenclatures that describe the role an individual is doing.

## Role & Responsibilities

- **Expectations defined at each level**
- E1 and E2 are IC roles, EL1 - EL4 are People Manager roles
- Each level builds on the expectations from the 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

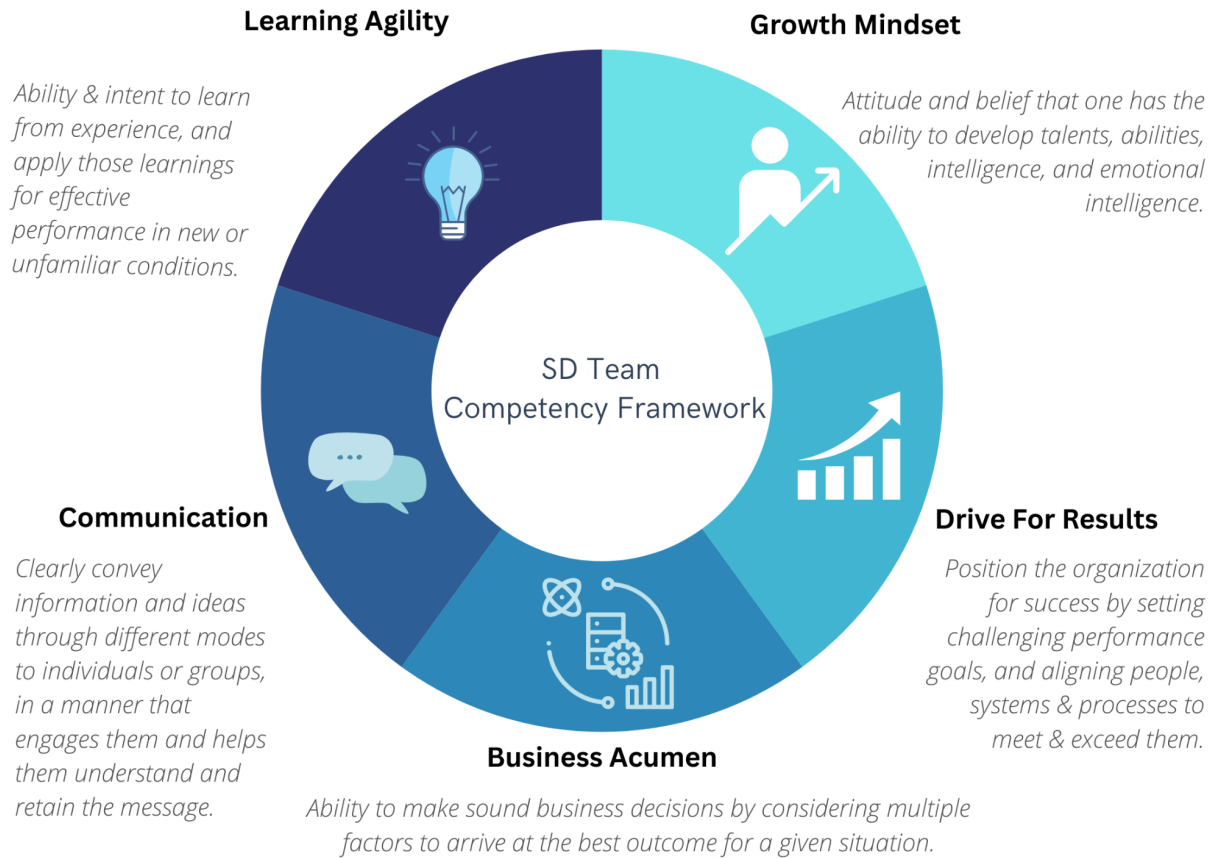
- **Knowledge, skills and attitudes required at each level**
- Required proficiency of each competency increases as one moves up the levels
- Movement to the next level happens only after an individual starts exhibiting behaviours at the next level
- **How to read it?**
  - **Competency** - the required 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.

# Sales Development

## CAREER FRAMEWORK



# COMPETENCY FRAMEWORK



# E1

## Sales Development Representative

<b>Role Summary</b>		Handle inbound leads from SMB prospects for the specified region(s), drive prospect conversation and outbound prospecting to generate SALs.
<b>KRA</b>	<b>Sub-Category</b>	<b>Activities</b>
<b>Follow up</b>	Small and Medium	<ul style="list-style-type: none"> <li>• Work on assigned set of leads to qualify opportunities</li> <li>• Ensure open leads are running in necessary sequences</li> <li>• Prioritize leads based on Lead Source and Campaign</li> <li>• Reach out via calls, voice notes, emails, LinkedIn</li> <li>• Ensure leads are followed up diligently and are run in a customized outreach sequence as per the inbound lead type</li> <li>• Nurture potential conversations till converted into SAL as defined by business requirements</li> </ul>
<b>Lead Reachout Time</b>	Calendarised & Non-Calendarised leads	<ul style="list-style-type: none"> <li>• Ensure leads that have not booked time with us are reached out within 30 minutes of their registration on our website</li> <li>• Leads that have booked time are sent an introductory email clearly stating the agenda of the upcoming discovery call</li> </ul>
<b>Discovery Calls</b>	Small and Medium	<ul style="list-style-type: none"> <li>• Do appropriate research to prepare adequately for the discovery call</li> <li>• Cover all aspects of qualification in the stipulated time with the prospect</li> <li>• Set up correct expectations of upcoming next step</li> <li>• Share the base platform fee as per the agreed <a href="#">ROE</a> with the Sales team</li> </ul>
<b>Research</b>	Leads	<ul style="list-style-type: none"> <li>• Identify the prospect's role in the organization using ZI, LinkedIn and other Generative AI tools</li> <li>• Visit the prospect's engagement history on the website</li> <li>• Gather account-level intel from LinkedIn, Demandbase signals, Google (for example- current tech stack, possible apps for DAP, competitor presence)</li> <li>• Find customer references as per industry and possible use cases that can be profiled during the discovery call</li> </ul>
	Product Knowledge	<ul style="list-style-type: none"> <li>• Constantly keep yourself updated with new releases, updates in Whatfix product</li> <li>• Join product update sessions conducted by the Product Team</li> </ul>
<b>Data &amp; Tool Hygiene</b>	Salesforce	<ul style="list-style-type: none"> <li>• Daily hygiene of managing lead flows - response time for all new leads, update leads' status, adding unqualified reasons and a brief of the conversation</li> <li>• Log all activities on lead level within 24 hours</li> </ul>

		<ul style="list-style-type: none"> <li>• Conversion of lead to opportunity on SF if qualified</li> <li>• Feed Notes, Contact Status, App, Date of Demo, Call Recording on CRM</li> </ul>
	Outreach	<ul style="list-style-type: none"> <li>• Ensure all activities driven through Outreach are logged &amp; synced with Salesforce within 24 hours</li> <li>• Manage Sequences to remove redundancies &amp; repetitive entries</li> <li>• Ensure there are no overdue tasks</li> <li>• Ensure all calls are recorded</li> </ul>
	LinkedIn	<ul style="list-style-type: none"> <li>• Prospect Research Intelligence</li> <li>• Understanding the prospect's employment history (if any)</li> <li>• Leverage the prospect research on persona and activities to personalize conversations and build rapport</li> </ul>
	Miscellaneous	<ul style="list-style-type: none"> <li>• Utilize Pardot engagement activity on all leads to gather intel on a prospect's intent and personalize reachouts</li> <li>• Leverage Zoominfo to gather intel on org structure and tech stack and utilize it on discovery calls to dive deeper into requirements</li> <li>• Leverage Demand Base to gather account-level intel and stay updated on any changes that may occur</li> </ul>
<b>Collaboration</b>	External teams	<ul style="list-style-type: none"> <li>• Collaborate with SMB Sales team on the new assigned opportunities</li> <li>• Share feedback with Performance Marketing team on the lead quality</li> <li>• Collaborate with SE Team on Technical Qualifications/ Mobile &amp; Desktop</li> <li>• Collaborate with Sales Enablement to meet self-enablement goals and activities</li> <li>• As per the business requirement, join the sales/marketing teams in external events</li> </ul>
	Internal Team	<ul style="list-style-type: none"> <li>• Sharing constant best practices, new findings and ideas to help team experiment and experience success</li> <li>• Contribute by conducting mock calls for new joiners in the SD team</li> </ul>
<b>Key Metrics</b>		<ul style="list-style-type: none"> <li>• Category-wise Lead to Opportunity Conversion (Small : 0-50/50-100/100-200 and, Medium) (min 80% target attainment)</li> <li>• Opportunity creation to acceptance should be above 85%</li> <li>• UserGem Demos SAL.</li> </ul>

## E1 Competencies

Competency	Behavioural Indicators
Communication	<p><b>Written, Verbal &amp; Non-Verbal</b></p> <ul style="list-style-type: none"> <li>• I write clearly and speak fluently in the language of business.</li> <li>• My email communication is well-crafted, succinct and well-understood by the recipients.</li> <li>• I demonstrate complete presence during calls and discussions.</li> <li>• I share relevant information with prospects that may be helpful in making decisions. I provide them with an honest picture of who we are &amp; how we can help them.</li> <li>• I maintain <u>video conferencing hygiene</u> during all virtual connects.</li> </ul> <p><b>Formal Presentation</b></p> <ul style="list-style-type: none"> <li>• I present ideas effectively to individuals or groups by delivering presentations suited to the situation and the needs of the audience.</li> <li>• My presentation follows a logical sequence, and I successfully present facts and evidence supporting my main ideas.</li> <li>• I command attention and can manage group processes during the presentation.</li> </ul> <p><b>Listening &amp; Probing Skills</b></p> <ul style="list-style-type: none"> <li>• I listen patiently &amp; attentively to understand others, ask clarifying questions, and recall important information when needed.</li> <li>• I take into account personal / environmental biases and cultural contexts while receiving messages.</li> </ul>
Learning Agility	<ul style="list-style-type: none"> <li>• I follow a systematic approach towards learning on the job.</li> <li>• I have strong intellectual curiosity and ask relevant questions to gain a better understanding and deeper comprehension.</li> <li>• I constantly seek feedback from others and work on it to improve my performance and capabilities.</li> </ul>
Drive for Results	<ul style="list-style-type: none"> <li>• I demonstrate honesty, keep commitments and behave in a consistent manner.</li> <li>• I consistently meet the quality and performance standards set for me.</li> <li>• I plan my day, prioritize my meetings, and ensure that my outreach activities are in line with the goals.</li> <li>• I am not deterred by failures and keep myself motivated to work towards meeting my objectives.</li> </ul>



<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>• I deep dive to understand prospect goals, short/long-term roadmap and how Whatfix can meet their requirements and create value.</li> <li>• I am keen to know more about Whatfix products and their new features, and actively take refresher product training courses to stay updated.</li> <li>• I am passionate about building my understanding &amp; knowledge of client applications and tools.</li> </ul>
<b>Growth Mindset</b>	<ul style="list-style-type: none"> <li>• I take steps and measures every day to progress towards meeting my objectives.</li> <li>• I step out of my comfort zone to take on new challenges and explore new opportunities.</li> <li>• I constantly seek novel ways to address challenges and revise my approach.</li> </ul>

## E2

### Enterprise Sales Development Representative

<b>Role Summary</b>		Handle inbound leads from E/ LE/ Medium market segments (as per business requirements) in specified regions, and drive prospect conversations to generate SALs. Drive leads generated via different sources to SAL conversation.
<b>KRA</b>	<b>Sub-Category</b>	<b>Activities</b>
<b>Follow up</b>	E/LE	<ul style="list-style-type: none"> <li>• Work on the assigned set of leads to qualify for opportunities</li> <li>• Ensure leads at stage 1,2,3,5 are running in necessary customized sequences</li> <li>• Prioritize leads based on Lead Source and Campaign</li> <li>• Reach out via calls, voice notes, emails, LI</li> <li>• Ensure leads are followed up diligently and are run in a customized outreach sequence as per the form filled (Demo, Trial, Quote, Chat, Email)</li> <li>• Nurture potential conversations till converted into SAL as defined by business requirements</li> </ul>
<b>Lead Reachout Time</b>	Calendarised & Non-Calendarised leads	<ul style="list-style-type: none"> <li>• Ensure leads that have not booked time with us are reached out within 30 minutes of their registration on our website</li> <li>• Leads that have booked time are sent an introductory email clearly stating the agenda of the upcoming qualification call</li> </ul>
<b>Qualification and Discovery Calls</b>	E/LE	<ul style="list-style-type: none"> <li>• Conduct appropriate research to prepare adequately for the qualification call</li> <li>• Cover all aspects of qualification in the stipulated time with the prospect</li> <li>• Set up correct expectations of upcoming next step</li> <li>• Set up the pre-discovery huddle to prep for the upcoming discovery call</li> </ul>

		<ul style="list-style-type: none"> <li>Participate in the 1-hour discovery call and ask relevant questions to unearth crucial information</li> </ul>
<b>Research</b>	Lead	<ul style="list-style-type: none"> <li>Identify the prospect's role in the organization using ZI, LI</li> <li>Visit prospect's engagement history on the website</li> <li>Gather account-level intel from LinkedIn, Demandbase signals, Google (for example- current techstack, possible apps for DAP, competitor presence)</li> <li>Find customer references as per industry and possible use cases that can be profiled during the discovery call</li> </ul>
	Product Knowledge	<ul style="list-style-type: none"> <li>Constantly keeping yourself updated with new releases, updates in Whatfix product</li> <li>Attending product update sessions conducted by the Product Team and educating / conducting an internal quiz within the team.</li> </ul>
<b>Collaboration</b>	External Teams	<p><b>In addition to E1 responsibilities:</b></p> <ul style="list-style-type: none"> <li>Collaborate with AEs to prepare for a 60-minute discovery call</li> <li>Conduct group demos for leads coming from Small categories and non-performing blog pages</li> </ul>
	Internal Teams	<p><b>In addition to E1 responsibilities:</b></p> <ul style="list-style-type: none"> <li>Take on responsibility for E1 members to aid / mentor them with their Ramp Up &amp; smooth integration with the SD function</li> <li>Share best practices with the team - helping to improve prospect qualification and disqualification.</li> <li>Find solutions to roadblocks pertaining to hitting the targets and goals on individual as well as team levels.</li> </ul>
<b>Key Metrics</b>		<ul style="list-style-type: none"> <li>Category-wise Lead to Opportunity Conversion (Enterprise and Large Enterprise (min 80% target attainment)</li> <li>Opportunity creation to acceptance should be above 80%</li> <li>UserGems SALs Contributed</li> </ul>

## E2 Competencies

Competency	Behavioural Indicators
Communication	<p><b>Verbal &amp; Non-verbal</b></p> <ul style="list-style-type: none"> <li>• I always exhibit a highly professional demeanour in both verbal and non-verbal communication with internal &amp; external stakeholders.</li> <li>• I successfully represent Whatfix to external stakeholders to create the right impact.</li> <li>• I anchor, sustain and close long-looped conversations for high-profile opportunities.</li> <li>• I can recognize discrepancies between the speaker's verbal and non-verbal communication and modify the messaging accordingly.</li> <li>• I convey complex ideas at a level appropriate to the audience using ideas/terminology they understand.</li> </ul> <p><b>Formal Presentation</b></p> <ul style="list-style-type: none"> <li>• I effectively use non-verbal communication to convey the right message during my presentation.</li> <li>• I am effective in a variety of formal presentation settings: one-on-one, small and large groups, with peers, juniors and leaders.</li> <li>• I am very comfortable with addressing all lines of questioning during/after my presentation, thus meeting the objectives of my presentation at all times.</li> <li>• I focus on prospects' needs while addressing the questions instead of only focusing on the set agenda to be discussed.</li> </ul> <p><b>Listening &amp; Probing Skills</b></p> <ul style="list-style-type: none"> <li>• I practice active listening to understand others' thoughts / emotions and affirm my understanding by paraphrasing what was heard.</li> <li>• I listen, observe and probe closely to identify the expressed and unexpressed sentiments</li> </ul>
Learning Agility	<ul style="list-style-type: none"> <li>• I have a high speed of learning and grasp things quickly.</li> <li>• I seek new, more effective ways to address problem statements.</li> <li>• I have a deep comprehension of concepts and their application and help others build the same.</li> <li>• I enjoy complex problems and challenges associated with new experiences.</li> </ul>

<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>• I go above &amp; beyond to ensure that my efforts result in the desired outcomes.</li> <li>• I actively engage with passive/dormant prospects to reinitiate the relationship and create opportunities.</li> <li>• I effectively inform and mobilise resources (people, knowledge, data, etc.) to meet the prospect's objectives and expectations.</li> <li>• I contribute to improving work practices, outcomes and team performance.</li> <li>• I make efforts to optimise process workflows by using different tools &amp; technologies.</li> <li>• I successfully steer inter-departmental work sprints to achieve desired outcomes.</li> </ul>
<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>• I am proficient in connecting the dots between the right product feature and prospect needs and focus.</li> <li>• I look for ways to add value beyond prospects' immediate use cases.</li> <li>• I anticipate prospects' upcoming needs and concerns based on my knowledge, expertise and research on the organisation and industry landscape.</li> </ul>
<b>Growth Mindset</b>	<ul style="list-style-type: none"> <li>• I give equal attention and effort to improving my weaknesses as I do playing by my strengths.</li> <li>• I have high resilience and maintain consistency in the face of failures.</li> <li>• I am comfortable with change and work towards taking it in my stride as opposed to being resistant to it.</li> </ul>

## EL1

### Team Lead - Sales Development

<b>Role Summary</b>		Drive a high-performing team of SDRs(IC) to meet lead-to-opp conversion and SAL targets.
<b>KRA</b>	<b>Sub-Category</b>	<b>Activities</b>
<b>Driving High Performing Teams</b>	Functional Coaching	<ul style="list-style-type: none"> <li>• Coach SDRs on calling and communication - weekly reviews, insights and share feedback from calls with the SDRs</li> <li>• Connect 1:1 with the team to guide them on different lead and campaign sources</li> <li>• Help the team ideate on reach-out methodologies</li> <li>• Listen to recorded calls, shadow live calls weekly &amp; provide actionable feedback</li> <li>• Enable E2 to mentor new SDRs in their initial stages and, plan &amp; conduct mock calls.</li> <li>• Devise an onboarding plan, internal go-live checklist for new joiners on</li> </ul>

		the team. Shadow new joiners on their initial calls, help them create their initial sequences, VM scripts, LI messaging etc.
	Increasing Team Efficiency	<ul style="list-style-type: none"> <li>• Drive each SDR to attain 90% of the conversion target QoQ</li> <li>• Ensure the team creates opp pipeline for the next quarter from current quarter's leads</li> <li>• Analyze data and metrics to identify areas for improvement, optimize processes, and make data-driven decisions to enhance the team's performance.</li> <li>• Align the SDRs to clear goals and behavioral expectations</li> </ul>
	Team Management	<ul style="list-style-type: none"> <li>• Build foundational capabilities within the SD function by setting individual development goals and providing learning opportunities in partnership with the enablement team</li> <li>• Have timely career conversations with each eligible team member</li> <li>• Identify weak links and ensure the right guidance/enablement opportunities are provided to them.</li> <li>• Build a healthy and transparent work culture within the team.</li> </ul>
<b>Functional Excellence</b>		<ul style="list-style-type: none"> <li>• Brainstorm on campaigns / content / communication / messaging based on biz and customer landscape to maximize success ratio</li> <li>• Join weekly/monthly/quarterly connects for the assigned region for the latest updates and share data &amp; insights from ongoing activities</li> <li>• Set clear expectations and guidelines for process changes and foster team-level adherence</li> <li>• Ideate and execute innovative ideas to ensure maximum efficiency (SPIFFs)</li> <li>• Join the customer conversations when necessary</li> </ul>
<b>Cross-Functional Collaboration</b>		<ul style="list-style-type: none"> <li>• Identify opportunities to collaborate within and outside the Marketing team</li> <li>• Have weekly connects with Performance Marketing and Marketing Automation team</li> <li>• Have Quarterly connects with Sales Managers to discuss the status of opps passed</li> </ul>
<b>Data &amp; Tool Hygiene</b>		<ul style="list-style-type: none"> <li>• Manage the tool efficiency at an SDR level.</li> <li>• Track usage and effectiveness of each tool used by the team and function and share insights on their relevance with the management.</li> <li>• Collaborate with Marketing Ops and Sales Ops to align all team-specific reports w.r.t leads, opps for each company category.</li> <li>• Generate &amp; share monthly, quarterly target vs. attainment reports.</li> <li>• Track overall team and activity goals and remedial actions wherever necessary.</li> </ul>

<b>Key Metrics</b>	<p><b>For all TL roles:</b></p> <ul style="list-style-type: none"> <li>• IC quota as per business requirement. Lead to Opp conversion based on defined company category slab.</li> <li>• Aggregated team SALs</li> <li>• Lead to Opp conversion</li> <li>• Independently generate SALs via different sources as required</li> </ul>
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## EL1 Competencies

Competency	Behavioural Indicators
<b>Communication</b>	<p><b>Verbal &amp; Non-verbal Communication</b></p> <ul style="list-style-type: none"> <li>• I guide the team on communicating persuasively, handling objections proactively, and identifying what will convince the other party of their point of view.</li> <li>• I successfully drive critical conversations for my/team's high-value prospects.</li> <li>• I communicate effectively to establish a strong connect with the prospects.</li> <li>• I actively build trust with internal &amp; external stakeholders by demonstrating my understanding through open discussions.</li> </ul> <p><b>Formal Presentation</b></p> <ul style="list-style-type: none"> <li>• I convey the message convincingly both inside and outside the organization, on both cool (data) and hot (controversial) topics.</li> <li>• I seamlessly change tactics midstream when something isn't working.</li> <li>• I am comfortable factually debating on objections and respectfully agreeing to disagree on topics if needed.</li> </ul> <p><b>Listening &amp; Probing Skills</b></p> <ul style="list-style-type: none"> <li>• I seek out and incorporate others' ideas to arrive at the best possible solutions.</li> </ul>
<b>Learning Agility - Coaching Others</b>	<ul style="list-style-type: none"> <li>• I identify skill areas to be developed in my team members and provide the required learning impetus.</li> <li>• I guide my team to learn from their mistakes.</li> <li>• I invest time and resources to help my team learn, grow and develop.</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>• I set realistic targets for myself and the team; ensure the availability of resources and support the SD team in achieving results.</li> <li>• I monitor progress and performance; evaluate achievements and integrate lessons learned into future plans of action.</li> <li>• I help my team generate breakthrough ideas, fresh perspectives and new approaches to meet prospect needs.</li> </ul>

<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>• I bring a clear understanding of prospect applications, business &amp; industry trends and relevant use cases that will help them make decisions, and guide my team to build this skill.</li> <li>• I have strategic discovery conversations to identify the latent needs of the prospects.</li> <li>• I monitor, evaluate and, if needed, modify the team’s approach towards engaging different accounts.</li> <li>• I proactively strategise with the team to find new ways to engage with past and current opportunities.</li> </ul>
<b>Growth Mindset</b>	<ul style="list-style-type: none"> <li>• I guide my team to have positive self-talk when faced with challenges.</li> <li>• I have retrospective conversations (<i>what was done &amp; what was learned</i>) with my team to help them reflect and grow without fearing failure.</li> <li>• I build and invest in relationships to earn the team’s trust.</li> </ul>

## EL2

### Lead - Sales Development

<b>Role Summary</b>	Drive high-performing teams of ICs and People Managers in assigned regions to meet SAL and conversion targets
<b>KRA</b>	<b>Activities</b>
<b>Drive High Performing Teams</b>	<ul style="list-style-type: none"> <li>• Translate the overall targets to region-specific goals for each quarter, and strategize on meeting set objectives</li> <li>• Identify &amp; suggest performance-centric IC goals.</li> <li>• Coach and guide Team Leads to develop and hone their managerial skills.</li> <li>• Monitor the performance of all team members, provide early feedback, raise red flags where required and keep the performance levels high. <ul style="list-style-type: none"> <li>○ Prepare and revise performance plans for the team members as needed.</li> <li>○ Conduct quarterly reviews for the team and plan ahead.</li> <li>○ Collaborate with TLs to create IC-specific plans.</li> <li>○ Create TL success metrics and TL-specific IDPs.</li> </ul> </li> <li>• Identify motivational team-specific reward milestones.</li> <li>• Ensure development focus within the team via individual development plans, learning plans and LinkedIn Learning paths.</li> <li>• Ensure all eligible employees undergo at least 1 career conversation in a year.</li> </ul>

<b>Functional Excellence</b>	<b>In addition to EL1 responsibilities:</b> <ul style="list-style-type: none"> <li>● Review &amp; revise strategies quarter-on-quarter based on performance and progress.</li> <li>● Research on competitor campaigns and identify the ones that can be experimented by us</li> <li>● Build processes to attain efficiency and excellence, and make them repeatable.</li> <li>● Set guidelines for different processes and drive compliance within the team.</li> <li>● Periodically work on process enhancement initiatives.</li> <li>● Resolve cross-functional conflicts smoothly and mitigate risks to productivity.</li> <li>● Work with the Sales/Enablement/Performance Marketing leadership on identifying the goals, short and long.</li> <li>● Run experiments with the performance marketing team to identify new categories which can be targeted and build an SDR plan.</li> <li>● Handle leads and meetings from Concierge Events.</li> </ul>
<b>Cross-Functional Collaboration</b>	<ul style="list-style-type: none"> <li>● Ensure team performance, plans and stories are transparently presented across stakeholders in a periodic fashion.</li> <li>● Share data-driven feedback to various campaigns, initiative</li> <li>● Collaborate within the marketing function to ensure SLAs are created and adhered to.</li> <li>● Collaborate with the Sales team for appropriate transition and pipeline visibility.</li> </ul>
<b>Key Metrics</b>	<ul style="list-style-type: none"> <li>● Aggregated team-specific SALs</li> <li>● 50% of the team at &gt;100% attainment</li> <li>● 50% of the team at &gt; 80% attainment</li> <li>● Demos created</li> <li>● Lead to Opp conversion (per category per region)</li> <li>● Performance in different functions (Inbound- minimum 75%, LinkedIn - minimum 40%, UserGems- minimum 60%)</li> <li>● Inbound SAL Acceptance rate (ELE - 85%, SMB - 80%)</li> <li>● SAL (30% conversion) from 1:1 meetings from Concierge Events both physical and virtual</li> <li>● Independently generate SALs via different sources as required</li> </ul>



## EL2 Competencies

Competency	Behavioural Indicators
<b>Strategic Communication</b>	<ul style="list-style-type: none"> <li>• I communicate impactfully to cast a good first impression, command attention and respect, showing an air of confidence.</li> <li>• I successfully de-escalate high-pressure situations with important stakeholders through careful, well-crafted verbal and written communication.</li> <li>• I remain open to ideas, listen to others and objectively consider their ideas and opinions even when they conflict with my own.</li> <li>• I role-model openness and transparency in sharing and receiving information to set the right expectations within the team.</li> </ul>
<b>Learning Agility - Coaching Others</b>	<ul style="list-style-type: none"> <li>• I mentor &amp; coach teams to widen their thought process and enable continuous growth &amp; development.</li> <li>• I build cooperation between departments and work groups.</li> <li>• I actively develop rapport with a variety of people and guide my team in building trust &amp; strengthening relationships.</li> <li>• I deal effectively with all races, nationalities, cultures, disabilities, ages, sexes, and life perspectives.</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>• I focus on encouraging more efficient processes thereby promoting faster goal closure.</li> <li>• I set high standards of performance by providing stretch objectives and goals to my team.</li> <li>• I develop team capability by proactively identifying the skill gaps and role requirements.</li> <li>• I ensure adherence to all performance-driven processes and practices.</li> </ul>
<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>• I share trends and transformations in the region / solution area / market segment with the leadership to influence changes in the overall approach and strategy.</li> <li>• I strategically align internal efforts (process, content, offerings, etc.) around the prospect's needs.</li> <li>• I proactively strategize with the team to find new ways to engage with past and current opportunities.</li> <li>• I bring the focus of the team towards new prospects and actively plan to reach out to them.</li> </ul>
<b>Growth Mindset</b>	<ul style="list-style-type: none"> <li>• I encourage and motivate my team by showcasing opportunities in the midst of crises.</li> <li>• I provide clarity to the team on their growth paths to help them envision a future beyond their current goals.</li> <li>• I break silos and drive an inclusive culture within and outside the team.</li> </ul>

# EL3

## Head - Sales Development

<b>Role Summary</b>	Define the functional roadmap and execute it successfully through high-performing teams to meet the targets for the assigned regions.
<b>KRA</b>	<b>Activities</b>
<b>Strategic Leadership</b>	<ul style="list-style-type: none"> <li>• Make strategic plans to meet, beat and exceed SAL and conversion targets.</li> <li>• Workforce planning to ensure target achievement &amp; putting mitigating plans in place wherever required.</li> <li>• Identify new avenues, improvise on existing SOPs and drive key initiatives.</li> <li>• Future proofing the function by planning in advance be it capacity, market, process, etc.</li> <li>• Drive cross-functional collaboration, planning and management on projects (within and outside Marketing BU).</li> <li>• Responsible for the cost and efficiency metrics for the assigned regions.</li> </ul>
<b>Drive High Performing Teams</b>	<ul style="list-style-type: none"> <li>• Build a motivated team, and create &amp; sustain a healthy work environment.</li> <li>• Guardian of Whatfix Principles and cultural codes.</li> <li>• Ensure healthy retention of employees in the function.</li> <li>• Ensure the right career growth path and growth stories.</li> <li>• Build clarity on team vision &amp; mission, goals and roadmap, accountability and decision-making flows across the team.</li> <li>• Encourage delegation for the managers to build a more coaching/strategic perspective and for the team members to take on new initiatives.</li> <li>• Prioritise team morale and productivity, and celebrate their successes.</li> <li>• Drive innovation within the team through process enhancements, adopting industry best practices, planning new initiatives</li> </ul>
<b>Key Metrics</b>	<ul style="list-style-type: none"> <li>• Region-specific SALs, NBMs and conversion targets (EMEA, NA - Inbound SMB/ ELE, Per event opp conversion, UserGems, LinkedIn, 1:1 meetings)</li> <li>• 80% Forecast accuracy</li> <li>• Funnel conversion % (Opps created to SAL)</li> <li>• SAL to POC conversion %</li> <li>• Cost &amp; Efficiency as defined for the assigned region</li> <li>• Pool of ramped SDRs at any given point in time</li> <li>• Region-specific pipeline target</li> <li>• Contribution of all channels towards pipe gen</li> <li>• Independently generate SALs via different sources as required</li> </ul>

## EL3 Competencies

Competency	Behavioural Indicators
<b>Strategic Communication</b>	<ul style="list-style-type: none"> <li>● I successfully hold executive-level conversations to build trust and commitment.</li> <li>● I participate in confidential &amp; critical business meetings or discussions.</li> <li>● I demonstrate a strong ability to challenge assumptions.</li> <li>● I can successfully probe to identify gaps missed by my teams to have an insightful discovery process.</li> </ul>
<b>Learning Agility - Coaching Others</b>	<ul style="list-style-type: none"> <li>● I accurately assess the potential barriers and resources for change initiatives and guide the team to success.</li> <li>● I envision and articulate the intended result of the change process in a manner the team understands.</li> <li>● I promptly switch strategies or tactics if the current ones are not working.</li> <li>● I provide mentoring / guidance and share relevant opportunities to build managerial capabilities within the SD team.</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>● I inspire the team to be result-driven and motivate them to go over &amp; beyond.</li> <li>● I set high standards of performance by providing stretch objectives and goals to my team.</li> <li>● I invest time and effort in providing objective feedback and reflecting on the learnings to set new process standards and ways of working.</li> <li>● I build &amp; define broad frameworks / models to drive SD objectives within the team or organization.</li> <li>● I have a strong bias for action &amp; promote it in the team as well.</li> </ul>
<b>Growth Mindset</b>	<ul style="list-style-type: none"> <li>● I actively build a culture where the team takes risks, innovates and expresses their ideas.</li> <li>● I have strong situational awareness - can see around &amp; beyond the targeted area. I keep my vision circular rather than linear.</li> <li>● I set high people and process standards to remove mediocrity and complacency.</li> </ul>

# EL4

## Global Head - Business Development

<b>Role Summary</b>	Define and lead the Whatfix Business Development strategy to meet Whatfix ARR and Pipeline targets
<b>KRA</b>	<b>Activities</b>
<b>Strategic Leadership</b>	<ul style="list-style-type: none"> <li>• Build the business development strategy to meet the short-to-medium-term organizational objectives through balanced growth from all teams and sales strategies.</li> <li>• Define and drive the NBM, SAL &amp; Pipeline generation targets/OKRs/KPIs for BD &amp; SD teams.</li> <li>• Build &amp; sustain high-performing teams with the required capabilities to meet monthly / quarterly / annual goals and targets.</li> <li>• Create a roadmap for higher growth and new opportunities in targeted areas.</li> <li>• Set and achieve the function cost &amp; efficiency metrics for all regions, sales motions and industry verticals.</li> <li>• Ensure that the BD &amp; SD teams have enough resources ramped up in each team to achieve the required target</li> <li>• Ensure a career growth plan for all team members to make Whatfix a go-to place for Sales &amp; Business Development.</li> <li>• Develop plans and strategies to offset external/macro/micro-economic changes.</li> <li>• Stay connected with the ground reality and employee pulse, and ensure the problems at the bottom are communicated to team leads and managers.</li> </ul>
<b>Drive High Performing Teams</b>	<ul style="list-style-type: none"> <li>• Build a motivated team, and create &amp; sustain a healthy work environment.</li> <li>• Ensure operational efficiencies across teams, regions and industry verticals.</li> <li>• Role model Whatfix Principles and actively promote a team culture that builds capabilities for tomorrow.</li> <li>• Bring in, drive and manage organizational and functional-level change.</li> <li>• Regularly present the team's performance and success stories to different GTM teams.</li> <li>• Responsible for succession planning to meet objectives &amp; projections - build the future leadership layer within the team</li> </ul>
<b>Key Metrics</b>	<ul style="list-style-type: none"> <li>• OKRs &amp; KPIs for BD &amp; SD teams</li> <li>• SAL</li> <li>• Pipeline</li> <li>• E/LE Logos</li> <li>• Hiring and Retention</li> <li>• Enablement and Certifications</li> <li>• All sales motions contributing towards the pipeline</li> </ul>

- Cost & Efficiency as per company standards

## EL4 Competencies

Competency	Behavioural Indicators
<b>Strategic Communication</b>	<ul style="list-style-type: none"> <li>• I remain open to ideas, listen to others and objectively consider their ideas and opinions even when they conflict with my own.</li> <li>• I bring all stakeholders together by influencing and articulating the big picture to them in a manner that they best understand.</li> <li>• I successfully represent Whatfix to external stakeholders to create the right impact in cross-cultural contexts.</li> <li>• I listen with accuracy to discriminate facts from opinions, analyse facts to understand messages and remember significant details from conversations.</li> <li>• I leverage multiple forums and platforms to communicate, engage the team, and understand their pulse and sentiments.</li> </ul>
<b>Learning Agility - Coaching Others</b>	<ul style="list-style-type: none"> <li>• I provide mentoring / guidance and share relevant opportunities to build leadership capabilities within the BD &amp; SD team.</li> <li>• I drive continuous focus on development and coaching to ensure capability improvement at all levels of the team hierarchy.</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>• I focus on aligning the BD &amp; SD team's focus to Whatfix objectives and key results.</li> <li>• I actively share the roadmap with the team and invite thoughts and participation in formulating the strategies for the future.</li> <li>• I actively work with the leadership and HR partners to build a high-performing team and create a productive work culture.</li> <li>• I establish decision-making processes and drive their understanding and compliance.</li> </ul>
<b>Growth Mindset</b>	<ul style="list-style-type: none"> <li>• I drive growth beyond revenue targets by focusing on people and helping them grow.</li> <li>• I embrace uncertainty and ambiguity to find new opportunities</li> </ul>

# 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 career role / Business Unit?**

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 move to 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 this framework has 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 give additional responsibilities, Level up happens only after additional responsibilities are already handled. It is not mandatory that each & every behaviour is exhibited but one 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 impact expected.

**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 the HR team, 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? For eg. I am Team Lead, so will it be EL1 or EL2?**

The new level (which can be higher as well as lower) will be governed by the competency framework defined above and further depend on the assessment conducted by Marketing Leadership. The manager will communicate the new level to the employee and HR 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 am not in agreement 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. We will reassess your case internally and let you know the final decision.