

UX Writing Team

Career & Competency Frameworks

Update History

Version	Date	Updated by	Remarks
1.0	20 May 2024	Patrick Ashamalla	Framework created and added
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 UX Writing sub-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
- **Descriptive Titles** - nomenclature that describes the role being done instead of nominal (doing away with typical corporate titles like 'senior', 'director', etc)
- **How to read it?**
 - **Level** - example : W1
 - **Title** - example : UX Writing Contributor
- Senior expert roles (W5X, W6X, W7X) will be defined later on as the team evolves to occupy more roles in the overall framework

Role & Responsibilities

- **Expectations defined at each level**
- **W1 - W4 are IC roles**
- **W5X - W7X are Subject Matter Expert roles**
- **W5L - W8L are People Manager roles; D9 is the BU Head role**
- Each level builds on the expectations from previous level
 - Example : W2 responsibilities include W1 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

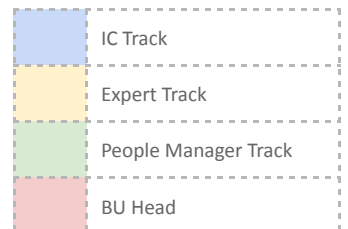
Competency Framework

- **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
- Competencies and required proficiency levels will evolve as the business context changes

UX WRITING

CAREER FRAMEWORK



COMPETENCY FRAMEWORK

Writing Acumen

Functional knowledge, depth of understanding and expertise, leveraged to discern and execute the best possible solutions.

Business Acumen

Ability to make sound decisions by considering multiple factors to arrive at the best outcome for a given situation.



Communication

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

Learning Agility

Ability & intent to learn from experience & apply those learnings for effective performance in new or unfamiliar conditions.

Drive for results

Position the organization for success by setting challenging performance goals, and aligning people, systems & processes to meet & exceed them.

W1

UX Writer - Contributor

Role Summary		Resolve function-level writing problems for the assigned team(s) and create clear, concise, and user-centric content.
KRA	Sub-Category	Activities
Core Writing	Content Strategy	<ul style="list-style-type: none"> Participate and assist in understanding user needs and crafting content strategies that enhance the user experience. Support the creation and maintenance of content guidelines and best practices.
	Content Creation	<ul style="list-style-type: none"> Write, edit, and review clear, concise, and user-friendly copy for various platforms, including web, mobile, and other digital products. Collaborate with designers and product managers to ensure content aligns with user needs and business goals. Conduct A/B testing and analyze user data to refine and improve content effectiveness.

	Content Systems	<ul style="list-style-type: none"> ● Maintain a consistent voice and tone across all user touchpoints. ● Create and manage content templates and reusable content components.
	Discovery Research	<ul style="list-style-type: none"> ● Assist in user interviews and observations to gather insights for improving content and user experience. ● Participate in strategic discussions with the product team to enhance content based on user insights before each sprint. ● Support in-depth research on the current and desired future state of the product to inform content decisions. ● Analyze and synthesize research findings to contribute to content strategy and writing. ● Document and communicate research findings to stakeholders.
Communication & Collaboration	Internal	<ul style="list-style-type: none"> ● Participate in workshops and brainstorming sessions with design and product teams to develop content solutions. ● Share content updates and recommendations with team leadership and peers. ● Provide input and feedback on UX and UI design considerations from a content perspective.
	Cross-Functional	<ul style="list-style-type: none"> ● Collaborate with product managers, designers, engineers, and other stakeholders to ensure cohesive and effective content delivery. ● Join regular sync meetings to showcase progress, exchange notes, and update on key metrics and projects.
	Team Interventions	<ul style="list-style-type: none"> ● Participate in team-level interventions or projects as required, contributing to the overall team goals and initiatives.
Enablement		<ul style="list-style-type: none"> ● Complete assigned learning paths and participate in workshops to gather ideas and feedback. ● Document and update content insights, stakeholder meetings, and project statuses on relevant platforms (e.g., Confluence, Workboard).

W1 Competencies

Competency	Behavioural Indicators
Communication	<p>Written, Verbal & Non-Verbal</p> <ul style="list-style-type: none"> ● I write clearly and concisely, ensuring grammatical accuracy and effective communication. ● I maintain professionalism in video conferencing and proactive communication. ● I develop storytelling skills to effectively convey narratives. <p>Formal Presentation</p> <ul style="list-style-type: none"> ● I present content ideas effectively to individuals or groups, using logical sequences and supporting evidence. ● I tailor presentations to suit the context and needs of the audience.
Learning Agility	<ul style="list-style-type: none"> ● I actively learn and reference industry content patterns and best practices. ● I develop research, content design, and content writing skills. ● I seek feedback to continuously improve content quality and effectiveness.
Drive for Results	<ul style="list-style-type: none"> ● I plan and prioritize tasks to align with goals. ● I focus on customer needs and expectations in content creation. ● I consistently meet quality and performance standards. ● I demonstrate integrity and commitment to delivering high-quality content.
Writing Acumen	<ul style="list-style-type: none"> ● I possess fundamental knowledge of UX writing principles and techniques. ● I am familiar with qualitative research and usability testing tools. ● I understand common content patterns and guidelines. ● I am keen to learn more about the product and actively update my knowledge through training.
Business Acumen	<ul style="list-style-type: none"> ● I develop an understanding of the industry landscape and customer goals. ● I understand how the product meets customer requirements and creates value. ● I actively update my knowledge of product features through training courses.

W2

UX Writer - Specialist

Role Summary		Resolve writing problems in product capabilities, ensuring the creation of user-centric, effective content.
KRA	Sub-Category	Activities

Core Writing	Content Strategy	<ul style="list-style-type: none"> ● Align with PM to prioritize backlog and research/testing activities for their product or project area. ● Participate in and contribute to strategic discussions with the product team on enhancing content based on feedback analysis and user insights before each sprint. ● Work with the Researcher, or independently, to conduct in-depth research on the current and future state of the product with moderate guidance. ● Conduct the analysis and synthesis of research findings and add insights to the content strategy with minimal guidance. ● Prepare, present, and communicate findings to peers and stakeholders with moderate guidance.
	Content Creation	<ul style="list-style-type: none"> ● Write, edit, and review content for various platforms with varying complexity, ensuring it meets user needs and business goals. ● Design unique content models and optimal hierarchical structures to best support information presentation with minimal direction. ● Create solution-specific guidelines and specifications describing user requirements for features in development. ● Conduct A/B tests and analyze results to inform content decisions.
	Content Systems	<ul style="list-style-type: none"> ● Maintain a consistent voice and tone across all user touchpoints. ● Create and manage content templates and reusable components. ● Ensure content meets accessibility, localization, and internationalization standards.
	Discovery Research	<ul style="list-style-type: none"> ● Conduct user interviews and observations to gather insights for improving content and user experience. ● Lead strategic discussions on content improvements based on user insights before each sprint. ● Conduct in-depth research on the current and future states of the product to inform content decisions. ● Analyze and synthesize research findings to contribute to content strategy and writing with minimal guidance. ● Document and communicate research findings to stakeholders.
Communication & Collaboration	Internal	<ul style="list-style-type: none"> ● Contribute to cross-pod collaboration to identify common problems, record patterns, and inform the team. ● Ensure common patterns are implemented across projects and lead discussions to align other designers. ● Collaborate with other designers to ensure alignment across pods, along with PM and EMs. ● Join cross-pod projects to manage the workload as needed.
	Cross-Functional	<ul style="list-style-type: none"> ● Present updates and progress to the larger R&D team. ● Drive engagement activities with internal teams, EMs, and PMs. ● Collaborate with DAA to test content in design.

		<ul style="list-style-type: none"> ● Implement instrumentation to measure the impact of content.
	Team interventions	<ul style="list-style-type: none"> ● Participate in team-level interventions or projects as required, contributing to overall team goals. ● Contribute to the development of content guidelines and best practices.
Enablement	Self & Team	<ul style="list-style-type: none"> ● Evangelize best practices within the team. ● Ensure continuous upskilling through courses and licenses. ● Participate in external talks and seminars to share knowledge.
	Mentoring	<ul style="list-style-type: none"> ● Manage interns, mentoring them on key writing practices, collaboration across pods, seeking information, addressing doubts, and best practices.
Data Hygiene & Documentation		<ul style="list-style-type: none"> ● Ensure all relevant data and metrics are updated across tools and platforms as required.

W2 Competencies

Competency	Behavioural Indicators
Communication	<p>Verbal & Non-Verbal</p> <ul style="list-style-type: none"> ● I exhibit professionalism in all communication with internal and external stakeholders. ● I convey complex ideas appropriately to the audience, using understandable terminology. ● I possess strong storytelling skills to create engaging narratives. ● I practice active listening to understand others' thoughts and emotions, affirming understanding by paraphrasing. <p>Formal Presentation</p> <ul style="list-style-type: none"> ● I independently facilitate workshops and convey the right message to the intended audience. ● I effectively present in various settings: one-on-one, small and large groups, with peers, juniors, and leaders. ● I comfortably address all lines of questioning during/after presentations, meeting objectives consistently.
Learning Agility	<ul style="list-style-type: none"> ● I continuously build product and domain knowledge. ● I understand how different product lines and features fit into organizational goals. ● I enjoy complex problems and new experiences.
Drive for Results	<ul style="list-style-type: none"> ● I go above and beyond to ensure efforts result in desired outcomes. ● I support and contribute to the overall team/pod roadmap. ● I work autonomously with minimal guidance, providing solid solutions to writing problems.

Research Acumen	<ul style="list-style-type: none"> ● I am familiar with industry and enterprise SaaS content patterns, accessibility guidelines, localization, and internationalization best practices. ● I am proficient in various quantitative and qualitative methodologies. ● I am skilled in usability testing methods and content design, working independently in these areas.
Business Acumen	<ul style="list-style-type: none"> ● I use appropriate resources to get things done efficiently. ● I connect the dots between product features and customer needs. ● I look for ways to add value beyond stated customer use cases. ● I anticipate customer needs and concerns based on knowledge, expertise, and research. ● I manage interns, mentoring them on key writing practices, collaboration across pods, seeking information, addressing doubts, and best practices.

W3

UX Writer - Specialist, Scope/Domain

Role Summary		Lead the solution of a product area, connecting it to a broader product vision (e.g., moving content through the draft-ready-production life-cycle).
KRA	Sub-Category	Activities
Core Writing	Content Strategy	<ul style="list-style-type: none"> ● Discover core problems to address in content strategy. ● Connect with customers, design partners, and internal stakeholders to gather data, synthesize findings, and share insights. ● Plan and schedule research activities to align with content strategy goals. ● Assess usability problems caused by implementation errors, customer feedback, and complex workflows within or across products. ● Conduct observational studies and synthesize research for team and stakeholder review. ● Plan and schedule usability studies for complex UI building blocks or novel interaction patterns.
	Content Creation	<ul style="list-style-type: none"> ● Conduct workshops with stakeholders to align expectations, present research findings, and ideate on potential content solutions. ● Create design solutions for use cases and test them with design partners, customers, and internal teams for feedback. ● Write clear problem statements and briefs, iterating with feedback from others. ● Create detailed UX writing for development and documentation when required. ● Create complex interaction designs with logical, clear UIs that are easily understood with minimal explanation.

		<ul style="list-style-type: none"> ● Evaluate different perspectives and feedback to adjust ideas based on new information. ● Ensure designs are coherent with necessary standards and integrate with related product areas. ● Design solutions for multiple modalities, cross-product integration, and various product bundling scenarios. ● Use information design and hierarchy to drive user attention and prioritize content effectively.
	Content Systems	<ul style="list-style-type: none"> ● Build short-term (6-12 months) frameworks around content implementation and strategy, including relevant documentation. ● Ensure content meets accessibility, localization, and internationalization standards. ● Maintain a consistent voice and tone across all user touchpoints.
	Discovery Research	<ul style="list-style-type: none"> ● Conduct in-depth research on core content problems, gathering insights from customers and stakeholders. ● Plan and schedule research activities and usability studies. ● Synthesize research findings and share them with the team and stakeholders. ● Assess usability problems from implementation errors, customer feedback, and complex workflows.
Communication & Collaboration	Internal	<ul style="list-style-type: none"> ● Lead cross-pod collaboration to identify common problems, record patterns, and inform the team. ● Conduct sessions to brainstorm and work on ideas across pods. ● Collaborate with other pods to discuss and review common solutions. ● Delegate tasks to mentees, track progress and create feedback loops.
	Cross-Functional	<ul style="list-style-type: none"> ● Present updates and progress to the larger R&D team. ● Define and implement new instrumentation to measure the impact of content decisions. ● Drive engagement activities with internal teams and stakeholders.
	Team Interventions	<ul style="list-style-type: none"> ● Participate in team-level interventions or projects as required. ● Contribute to the development of content guidelines and best practices. ● Guide junior team members on key writing practices and collaboration.
Enablement	Self-learning	<ul style="list-style-type: none"> ● Join workshops and learning sessions for the internal product design team.
	Mentoring	<ul style="list-style-type: none"> ● Provide on-the-job guidance to junior team members, helping them build bridges across the team and organization.
Data Hygiene & Documentation		<ul style="list-style-type: none"> ● Ensure all relevant data and metrics are updated across tools and platforms as required.

W3 Competencies

Competency	Behavioural Indicators
Communication	<p>Verbal & Non-Verbal</p> <ul style="list-style-type: none"> ● I communicate effectively to establish a strong connection with the audience. ● I actively build trust with stakeholders through open discussions. ● I seek out and incorporate others' ideas to arrive at the best possible solutions. <p>Formal Presentation</p> <ul style="list-style-type: none"> ● I convey messages convincingly on both data-driven and controversial topics. ● I am comfortable debating objections and agreeing to disagree respectfully. ● I am highly skilled at facilitating workshops and guiding team sessions.
Learning Agility - Coaching Others	<ul style="list-style-type: none"> ● I am comfortable solving complex problems and acting as a multiplier in areas of expertise. ● I can influence other practitioners and cross-functional teams. ● I guide the team to learn from mistakes and improve.
Drive for Results	<ul style="list-style-type: none"> ● I identify and deliver solutions that solve customer problems, achieve business outcomes, and move UX metrics. ● I lead, prioritize, and balance competing priorities. ● I contribute significantly to the team/pod roadmap and help execute the defined vision. ● I manage a limited number of moderately complex problems autonomously with minimal guidance.
Writing Acumen	<ul style="list-style-type: none"> ● I am highly proficient in design research and interaction design. ● I am fluent in platform-specific copy conventions and design systems. ● I understand specific disciplines to speed up decision-making processes. ● I determine which UX problems to heavily invest in for top-level solutions.
Business Acumen	<ul style="list-style-type: none"> ● I make decisions considering the impact on the team's work. ● I understand organizational goals and align approaches and actions to achieve them.

W4

UX Writer - Specialist, Scope/Domain

Role Summary	Lead the solution of undefined problem spaces, ensuring the creation of innovative and effective content strategies and designs.
KRA	Activities
Core Writing - Content Strategy	<ul style="list-style-type: none"> ● Research requirements, fulfill use cases, and identify other applications of the solution. ● Ensure accessibility is focused upon making the solutions future-proof. ● Ensure all requirements placed in the backlog and roadmap are reviewed, designed, and developed. ● Conduct research on aspects like data visualization, colours, and accessibility, and understand how other systems are designed to overcome their shortcomings. ● Generate multiple approaches to content problems and clearly articulate the pros and cons of each approach. ● Create novel or innovative solutions to complex or important interaction problems to break through standstills or gridlock. ● Distinguish higher-level user priorities and high-value differentiators from competing priorities to deliver highly desirable solutions. ● Ensure product and interaction designs are clear and adhere to universal design principles. ● Design for multiple personas that are very different from themselves. ● Create advanced interactive prototypes for user research and testing. ● Design for multiple form factors (e.g., responsive web, Mac/desktop, iOS, Adaptive Android, etc.). ● Design solutions for cross-product implementation. ● Ensure content solutions address problem statements and align with the user experience vision and direction.
Communication & Collaboration	<ul style="list-style-type: none"> ● Manage communication to designers and developers about the readiness of the design system and communicate adoption guidelines, accessibility linting, and other global guidelines. ● Collaborate with developers and designers to drive product adoption. ● Participate in leadership sync meetings to discuss progress and challenges. ● Define and communicate multi-phased design plans tailored to a project, orchestrate work with other designers, and execute large-scale redesigns. ● Organize and sequence activities around product design, including stakeholder alignment, user research, and testing. ● Influence cross-pod designers and external teams to solve problems, negotiate, and build consensus. ● Synthesize complex arguments verbally and in writing. ● Balance multiple projects and manage expectations and commitments in a timely manner. ● Ensure large-scale initiatives follow proper testing protocols. ● Address process or organizational issues that interfere with delivering great UX. ● Initiate and moderate team workshops. ● Uphold and defend content strategy and UX writing methods.

	<ul style="list-style-type: none"> ● Plan and execute user research studies and usability tests associated with Information Architecture, Taxonomy, and Terminology. ● Drive moderate to high-complexity problems with minimal guidance.
Team Enablement & Management	<ul style="list-style-type: none"> ● Ensure tasks are progressing well, set up weekly sessions to evaluate progress, and host office hours for questions. ● Ensure team members have role and project clarity and conduct regular check-ins. ● Create the roadmap in consultation with team members, maintain Jira boards, and ensure tasks are added on time. ● Address team concerns around missed terminology and ensure use cases are addressed. ● Handle resource allocation and escalate to leadership for support and decisions.
Data Hygiene & Documentation	<ul style="list-style-type: none"> ● Maintain documentation of the roadmap.

W4 Competencies

Competency	Behavioural Indicators
Strategic Communication	<ul style="list-style-type: none"> ● I communicate impactfully to cast a good first impression, command attention and respect, and show confidence. ● I role-model openness and transparency in sharing and receiving information to set the right expectations within the team. ● I seek to understand and validate others' perspectives and emotions.
Learning Agility - Coaching Others	<ul style="list-style-type: none"> ● I develop rapport with a variety of people and guide the team in building trust and strengthening relationships. ● I deal with diverse races, nationalities, cultures, disabilities, ages, sexes, and life perspectives effectively. ● I leverage knowledge and experience to influence across the board, including seniors and cross-functional stakeholders.
Drive for Results	<ul style="list-style-type: none"> ● I assert leadership in all aspects of the role. ● I develop problem-framing approaches, establish new starting points for novel solutions, and contribute to strategic thinking at a group level. ● I autonomously drive ambiguous projects towards successful outcomes. ● I manage time and effort efficiently to ensure fast goal closure. ● I resolve moderate to highly complex problem statements with minimal guidance. ● I ensure adherence to all performance-driven processes and practices.
Writing Acumen	<ul style="list-style-type: none"> ● I am proficient in common industry interaction and UI copy patterns and their nuances across platforms. ● I possess deep knowledge of the functional domain and Whatfix products.

Business Acumen	<ul style="list-style-type: none"> ● I have a thorough understanding of Whatfix as a business and work efficiently to optimize value. ● I understand the operating environment, recognize the impact of actions on business outcomes, and consider the bigger picture when making decisions. ● I offer assistance to colleagues and other teams in difficult situations and seek business improvement or learning opportunities.
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W5L

UX Writer - Lead, Scope/Domain

Role Summary	An organized leader and performer who pushes for high performance and drives change. Co-create with the team, drive skill building, align the team to overall vision & objectives, and draw actionable plans & share feedback for the team to work upon.
KRA	Activities
Drive Content Strategy	<ul style="list-style-type: none"> ● Collaborate and ideate with leaders in UX, Engineering, and Product to define the content strategy and strategic roadmap. ● Review, negotiate, and build consensus for quarterly content priorities with Product Management and Engineering. ● Contribute to team-level OKRs. ● Review release plans and quarterly roadmaps to ensure alignment with content strategy. ● Drive conversations with cross-functional stakeholders and decision-makers to align them on the overall strategy and action plan. ● Build frameworks in consultation with cross-functional leads to address gap areas and blind spots. ● Focus on content OKRs and key metrics, ensuring the team's quarterly goals align to execute the content strategy. ● Ensure the content strategy is rolled out and understood by teams and pods. ● Meet with customers and users to understand their needs and offer solutions that align with our products. ● Present roadmap and updates at leadership and stakeholder meetings. ● Conduct regular 1:1s with cross-functional leaders.
Enhance Team Quality & Effectiveness	<ul style="list-style-type: none"> ● Drive retrospective reviews of past quarters to capture the team's feedback on outcomes and leadership, making necessary changes in future action plans. ● Drive documentation best practices for all proposals to align cross-functional stakeholders to the same objectives. ● Coach leads to be hands-on, get actively involved in projects with sub-par output, and provide guidance to improve overall content quality.

	<ul style="list-style-type: none"> ● Conduct regular reviews, daily scrums, and alignment sessions to measure progress and identify areas of improvement. ● Attend team feedback sessions and give clear, actionable content and UX feedback that supports user needs, follows universal principles of writing, uses the established content style guide, and aligns with other product areas. ● Define content success metrics and ensure the team achieves set targets. ● Build action plans and make operational and prioritization decisions critical to the team's success. ● Conduct weekly 1:1s with direct reports. ● Review NPS, CSAT, and other customer feedback.
Team Management	<ul style="list-style-type: none"> ● Manage all employee and organizational processes, ensuring compliance for the entire team. ● Leverage formal and informal connections to stay aware of the team's pulse and overall well-being; provide extra support for growth where required. ● Drive important employee conversations: feedback, check-ins, 1:1s, quarterly reviews, career conversations, performance reviews, etc. ● Help the team set clear goals and provide the necessary resources and tools to achieve them. ● Create an environment of continuous learning, coaching team members on their personal development (e.g., presentation, communication, time management, prioritization, functional and technical skills). ● Calibrate the team each quarter and maintain a high-performing team. Hire the best people, integrate employees, and match team members to opportunities that extend their skills. ● Schedule team activities/outings.
Hands-On Managerial Expectations	<p>Customer-Focused:</p> <ul style="list-style-type: none"> ● Facilitate workshops as required (minimum once a year) ● Conduct customer interviews <p>Research-Focused:</p> <ul style="list-style-type: none"> ● Design and research plans to clarify content problems in the absence of an individual contributor. ● Synthesize qualitative feedback and quantitative data, presenting insights to support larger initiatives. ● Address domain-related queries based on research insights. ● Conduct user research. ● Create personas. <p>Planning-Focused:</p> <ul style="list-style-type: none"> ● Participate in content feedback sessions. ● Facilitate brainstorming sessions. ● Stay updated and promote the latest tools and trends in UX writing. ● Collaborate with the team on content work.

W5L Competencies

Competency	Behavioural Indicators
Strategic Communication	<ul style="list-style-type: none"> ● I convey complex ideas at a level appropriate to the audience using understandable terminology. ● I guide the team in persuasive communication, proactively handling objections, and identifying what will convince the other party of their point of view. ● I successfully drive critical conversations like customer or cross-functional stakeholder feedback discussions. ● I communicate effectively to establish a strong connection with internal and external stakeholders as their Content SPOC (Single Point of Contact).
Learning Agility - Coaching Others	<ul style="list-style-type: none"> ● I identify skill areas to be developed in team members and provide the required learning impetus. ● I guide the team to learn from their and the group's mistakes. ● I invest time and resources to help the team learn, grow, and develop.
Drive for Results	<ul style="list-style-type: none"> ● I set realistic targets for oneself and the team; ensure the availability of resources and support other members in achieving results. ● I monitor progress and performance; evaluate achievements and integrate lessons learned into future plans of action. ● I help the team generate breakthrough ideas, fresh perspectives, and new approaches to meet customer needs.
Writing Acumen	<ul style="list-style-type: none"> ● I ensure knowledge and skills are updated on all diverse writing domains the team is working on. ● I consistently upskill to refresh one's skills and set the right precedent for the team.
Business Acumen	<ul style="list-style-type: none"> ● I understand the capabilities, strengths, and weaknesses of team members, and allocate responsibility accordingly for effective outcomes. ● I monitor, evaluate, and if needed, modify the team's approach towards different projects and teams.

W6L

UX Writer - Lead, Scope/Domain

Role Summary	An effective leader focused on building teams and methods for high-impact results. Apply learnings & expertise across multiple projects & teams. Reframe the vision for their areas of focus. Manage a more experienced team of leads and principals.
KRA	Activities
Drive Content Strategy	<ul style="list-style-type: none"> ● Align Product Managers and Engineering teams on key priorities for the quarter and the overall vision and roadmap. ● Identify and prioritize features for a particular quarter, driving those priorities across all R&D teams. ● Foster continuous inter-team communication to create awareness of content deliverables, act on stakeholder feedback, and ensure a positive reception of content outcomes. ● Ensure teams are in sync with the content strategy and plan their focus accordingly. ● Set a vision for the team based on the product roadmap and OKRs, driving medium-to-long-term focus. ● Stay updated on market trends and innovations to leverage them in the course of work where possible. ● Participate in customer-facing workshops, observations, and discovery sessions. ● Co-present experience roadmap on select customer calls. ● Set and communicate teams' integrated product vision and direction based on the product and content vision, strategy, and goals spanning multiple product areas and/or personas. ● Create and present a 6- to 12-month content strategy. ● Contribute to department and team-level OKRs. ● Define and measure team-level success metrics. ● Drive at least one cross-product/horizontal initiative.
Enhance Team Quality & Effectiveness	<p>In addition to Level 5 responsibilities:</p> <ul style="list-style-type: none"> ● Drive multiple connections and interventions to ensure team deliverables meet set quality benchmarks. ● Track and ensure compliance with all data and documentation metrics and hygiene practices. ● Conduct in-depth quality reviews of team submissions to improve the overall output levels that go into the final release. ● Coach the team on personal development, functional skills, and technical skills (e.g., presentation, documentation, facilitating workshops). ● Drive content-led presentations and meetings with stakeholders, setting framing and context, and addressing high-level questions. ● Guide the team to improve research skills and output, increasing the scope of customers being reached. ● Ensure appropriate work allocation based on aptitude and attitude.
Team Management	<p>In addition to Level 5 responsibilities:</p> <ul style="list-style-type: none"> ● Drive conscious efforts to keep the team motivated and inspired. ● Identify and coach lead-level/aspiring leaders within the team, creating opportunities for them to use or stretch these skills. ● Coach leads to improve managerial competence and create a better work environment. ● Coach senior team members to become mentors and guide newer team members with their expertise. ● Drive enablement interventions in the team, focusing on translating learnings to the workplace. ● Participate in headcount and team planning.

Hands-On Managerial Expectations	<p>Customer-Focused:</p> <ul style="list-style-type: none"> ● Have regular customer-facing interactions. ● Facilitate customer-facing workshops. ● Conduct customer interviews. ● Derive and share on-site customer observations. <p>Research-Focused:</p> <ul style="list-style-type: none"> ● Design and research plans to clarify content problems. ● Synthesize qualitative feedback and quantitative data, presenting insights to support larger initiatives. ● Address domain-related queries based on research insights. ● Conduct user research. ● Create personas. <p>Planning-Focused:</p> <ul style="list-style-type: none"> ● Participate in content and UX feedback sessions. ● Present the content roadmap for the team. ● Facilitate brainstorming sessions. ● Collaborate with the team on content work.
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W6L Competencies

Competency	Behavioural Indicators
Strategic Communication	<ul style="list-style-type: none"> ● I successfully de-escalate high-pressure situations with important stakeholders through careful, well-crafted verbal and written communication. ● I role-model openness and transparency in sharing and receiving information to set the right expectations within the team.
Learning Agility - Coaching Others	<ul style="list-style-type: none"> ● I mentor and coach teams to widen their thought process and enable continuous growth and development. ● I build cooperation between departments and workgroups. ● I actively develop rapport with a variety of people and guide the team in building trust and strengthening relationships. ● I deal effectively with all races, nationalities, cultures, disabilities, ages, sexes, and life perspectives.
Drive for Results	<ul style="list-style-type: none"> ● I encourage more efficient processes, promoting faster goal closure. ● I develop team capability by proactively identifying skill gaps and role requirements. ● I ensure adherence to all performance-driven processes and practices.

Writing Acumen	<ul style="list-style-type: none"> • I identify the right opportunities, tools, and avenues for the team to upskill functionally and actively partner with them in the process. • I provide writing mentorship, either personally or through other leaders, to guide team members towards their goals and objectives.
Business Acumen	<ul style="list-style-type: none"> • I share trends and transformations in the writing domain/product line/solution area with leadership to influence changes in the overall approach and strategy. • I strategically align internal efforts (process, content, offerings) around customer needs and company objectives. • I bring the team's focus towards top priorities and actively plan to work towards those.

D7L

Head of Product Design, Product/Platform

Role Summary	A dynamic leader focused on strategic vision, growing talent, and execution. Manage 2 or more teams across focus areas.
KRA	Activities
Drive Design Strategy	<ul style="list-style-type: none"> • Set and present a compelling vision for the team, and actively contribute to the department's vision with Design leadership • Contribute to strategic objectives, developing and implementing policies, and help decision making on operational matters • Define high-level product and experience strategy with other cross-functional decision-makers • Review team roadmaps and ensure alignment with other product areas • Participate in, prioritize, and negotiate critical matters with x-functional leadership • Leads across functional areas to address business needs and implement efficiencies • Actively contribute to department and Tribe level OKRs • Join customer, stakeholder, and partner meetings • Showcase and evangelize your areas of experience strategy and direction in product design department meetings. Also present it to team members, internal stakeholders, and partners. • Represent Whatfix experience strategy to customers and design partners • Lead at least 1 large horizontal initiative or 2 medium • Translate product and experience vision into a clear and compelling experience strategy for your areas • Work towards taking on additional functional responsibilities in addition to the Product Design portfolio
Enhance Team Quality and effectiveness	<ul style="list-style-type: none"> • Define and track Product Design KPIs for multiple product areas • Review design work and team plans to ensure they align with product and experience vision. • Review feedback, analysis, and research and offer direction that addresses known problems and unmet needs. • Lead UX, design thinking, UX Writing and other innovation sessions involving other cross-functional

	<p>leaders.</p> <ul style="list-style-type: none"> • Direct the design, development, and enhancement of new and existing products and features. • Define UX investment priorities for your teams based on strategic outcomes and technical constraints. • Review and weigh in on technical decisions that affect the user experience. • Review work to ensure quality standards were kept. Hold those accountable and document feedback when they are not. • Conduct regular dotted-line and skip-level 1:1s
<p>Team Management</p>	<p>In addition to D6L responsibilities:</p> <ul style="list-style-type: none"> • Manage teams with diverse skills and responsibilities, as and when required • Develop people manager direct reports into strong mentors and people managers, strategic leaders, and potential successors. • Empower people manager direct reports to handle challenging management situations and provide additional support. • Intentionally weave a team, customer, and business mindset into everything they do. • Spearhead company culture and employee engagement-building initiatives across teams. • Attract high-potential candidates through reputation. • Empower others to foster a diverse, inclusive, and culturally competent environment, and partner with company leadership to remove barriers that may prevent this at department or company levels • Provide and receive constructive feedback effectively. • Proactively identify and address low employee performance with constructive feedback and documentation. • Identify skill gaps within the team and propose or facilitate necessary training. • Ensure feedback is timely and specific • Provide recognition of strong performance and wins big and small. • Critically manage own budget and analyze spend.
<p>Hands-On Managerial Expectations</p>	<p>Customer-Focused:</p> <ul style="list-style-type: none"> • Have regular customer-facing interactions • Facilitate customer-facing workshops • Conduct customer interviews • Derive and share on-site customer observations <p>Research-Focused:</p> <ul style="list-style-type: none"> • Design & research plan together to disambiguate design & content problems. • Synthesise qualitative feedback and quantitative data (and evangelise research insights) - gather data (quant & qual) and present it to build evidence for larger initiatives • Address domain-related queries based on research insights • Conduct user research • Create personas <p>Planning-Focused:</p> <ul style="list-style-type: none"> • Participate in product design& content feedback sessions • Present the design & content roadmap for the team

- Facilitate brainstorming sessions
- Collaborate with team on design & content work
- Work on a Navi component

D7L Competencies

Competency	Behavioural Indicators
Strategic Communication	<ul style="list-style-type: none"> • I successfully hold executive-level conversations to build trust and commitment. • I participate in confidential and critical business meetings or discussions. • I demonstrate a strong ability to challenge assumptions. • I successfully probe to identify gaps missed by teams to have an insightful discovery process.
Learning Agility - Coaching Others	<ul style="list-style-type: none"> • I accurately assess potential barriers and resources for change initiatives and guide the team to success. • I envision and articulate the intended result of the change process in a manner the team understands. • I promptly switch strategies or tactics if the current ones are not working. • I provide mentoring and share relevant opportunities to build managerial capabilities within the Content team.
Drive for Results	<ul style="list-style-type: none"> • I devise, facilitate buy-in, make recommendations, and guide the implementation of corrective and/or preventive actions for complex issues that cross organizational boundaries and are unclear in nature. • I analyze multiple alternatives, risks, and benefits for a range of potential solutions.
Writing Acumen	<ul style="list-style-type: none"> • I identify the right opportunities, tools, and avenues for the team to upskill functionally and actively partner with them in the process. • I provide writing mentorship, either personally or through other leaders, to guide team members towards their goals and objectives.
Business Acumen	<ul style="list-style-type: none"> • I notice the underlying connections, opportunities, and/or potential conflicts of actions on stakeholders within and external to the Content team, and proceed accordingly. • I always consider the impact of actions on the larger business/roadmap, evaluate the plan of action, and monitor for inefficiencies or inappropriate use of resources. • I leverage deep knowledge and understanding of the domain and operating environment to identify partnerships and build relationships to support business objectives.

D8L

Head of Product Design <Product/Platform>

Role Summary	A storyteller, team-builder, and driver of cross-product, cross-functional strategy. Operates independently and influences the culture of the UX Writing function within the organization.
KRA	Activities
Drive Design Strategy	<ul style="list-style-type: none"> • Set and articulate a compelling vision for the team and creation of overall department vision with the BU Head • Present the company's experience strategy to the department • Shape strategic objectives, develop and implement policies, and make final decisions on operational matters • Attend Review Board meetings as a stakeholder • Lead vision and strategy work with other cross-functional leaders to deliver a clear end-to-end cross-product, strategic roadmap • Lead multiple large horizontal programs • Present product and experience strategy to customers, partners, and executive stakeholders • Actively contribute to department, product, and team OKRs • Conduct customer, product, data analysis, and industry/market research to understand evolving customer needs • Propose new strategic plans to the BU Head and other stakeholders • Craft early explorations of high-level concepts and design problems • Partner with PM and Engg leaders to identify new ideas and innovation opportunities • Coordinate with Product Marketing to create product design alignment, and communication plans for new UX features and enhancements • Own additional function responsibilities (e.g., UX Writing) along with core functional responsibilities (e.g. Product Design) for owned products/platforms
Enhance Team Quality & Effectiveness	<ul style="list-style-type: none"> • Define and set the expectation for design& writing rigour and quality standard • Ensure design & content decisions are aligned with the company's experience vision • Review UX Design & Writing decisions against research and test results to ensure that work addresses customer and user needs • Ensure strategy is communicated and understood throughout your team • Cultivate a culture of innovation, creativity, feedback, and testing
Team Management	<p>In addition to D7L responsibilities:</p> <ul style="list-style-type: none"> • Mediate between team members across departments in cases of stalled disagreements over direction or prioritization • Optimize team assignments based on business, product, and group priorities. • Foster a positive, departmentally and functionally integrated team culture.

Hands-On Managerial Expectations	<p>Customer-Focused:</p> <ul style="list-style-type: none"> • Have regular customer-facing interactions • Facilitate customer-facing workshops • Conduct customer interviews • Derive and share on-site customer observations <p>Research-Focused:</p> <ul style="list-style-type: none"> • Design & research plan together to disambiguate design & content problems • Synthesise qualitative feedback and quantitative data (and evangelise research insights) - gather data (quant & qual) and present it to build evidence for larger initiatives • Address domain-related queries based on research insights • Conduct user research • Create personas <p>Planning-Focused:</p> <ul style="list-style-type: none"> • Participate in product design, content & UX Writing feedback sessions • Present the design & content roadmap for the team • Facilitate brainstorming sessions • Collaborate with the team on design & content work • Work on a Navi component
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D8L Competencies

Competency	Behavioural Indicators
Strategic Communication	<ul style="list-style-type: none"> • I remain open to ideas, listen to others, and objectively consider their ideas and opinions even when they conflict with my own. • I bring all stakeholders together by influencing and articulating the big picture in a manner that they best understand. • I successfully represent the organization to external stakeholders to create the right impact in cross-cultural contexts. • I listen with accuracy to discriminate facts from opinions, analyze facts to understand messages and remember significant details from conversations. • I leverage multiple forums and platforms to communicate, engage the team, and understand their pulse and sentiments.
Learning Agility - Coaching Others	<ul style="list-style-type: none"> • I execute strategies through people by providing leadership, feedback, coaching, utilizing influence, managing conflict, and developing talent for long-term success. • I candidly and openly share issues/failures without assigning individual blame, identify business improvements, and discuss ways in which the team can learn from mistakes and create turnaround situations.
Drive for Results	<ul style="list-style-type: none"> • I set high standards of performance by providing stretch objectives and goals to the team.

	<ul style="list-style-type: none"> ● I invest time and effort in providing objective feedback and reflecting on the learnings to set new process standards and ways of working. ● I build and define broad frameworks/models to drive business objectives within the team or organization. ● I have a strong bias for action and promote it within the team as well.
Business Acumen	<ul style="list-style-type: none"> ● I oversee business decisions and financial investments to evaluate the value delivered to customers, team members, cross-functional stakeholders, and the organization. ● I create business strategies and manage investments to achieve desired outcomes while ensuring adequate governance of the resources involved.

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 (eg. from UX Writing to Design or any other Whatfix team)?

Employees can transition to other roles within the Product Design 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 there are now fewer career levels?

Level up happens only after an employee is able to prove that they have already operated at the new scope & demonstrated the impact expected. Level up does not add additional responsibilities, it happens only after additional responsibilities are already handled. It is not mandatory that each & every behavior 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 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 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 lower level?

This is a calibration to a new framework, and any up/down movement is **not** a promotion/demotion - we are simply moving to a new way of structuring the team and setting 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 Design 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 gets 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 self 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.