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Customer Support Team

Career & Competency Frameworks

V1.0 - July 2023

AGENDA

- Objective

- Career Framework

- Role Summaries

- Role Profiles

- Competency Framework

- FAQ

OBJECTIVE

- Whatfix is growing and the opportunities for employees to develop and scale with the organization are growing as well.

- We have created Career and Competency Frameworks to clearly outline the role expectations at different levels and the capabilities required to excel in each role.

Career Framework

- **Defines the career growth path within the Customer Support function**

- Movement to the next level happens only after an individual starts to exhibit traits and skills for the next level (and other variables like position vacancy and business needs)

- Flatter structure - levels change only when there is a significant increase in scope and impact, not based on tenure

- 2 Career Tracks identified for employee growth:
  - Individual Contributor (IC)
 - People Manager

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Roles Profiles

- **Expectations defined at each level**

- Each level builds on the expectations from previous level

- Example : SL2 responsibilities include SL1 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

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Competency Framework

- **Knowledge, skills and attitudes required at each level**

- Required proficiency of each competency increases as one moves up the levels

- Movement to the next level happens only after an individual starts exhibiting behaviours at the next level

- Competency framework to be referred to at the time of hiring, developing IDPs, performance assessment, and movement from one level to another

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

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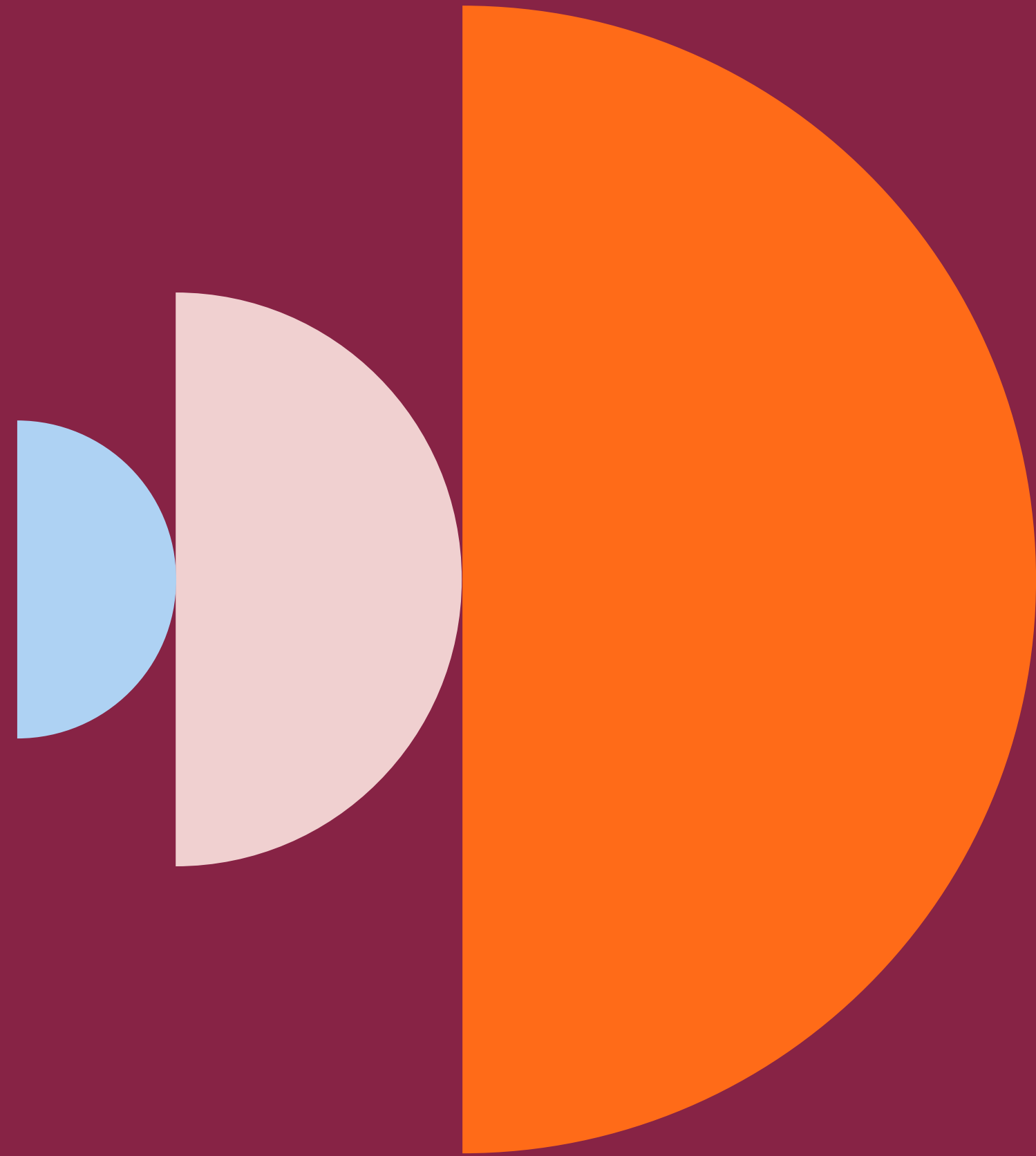
CAREER FRAMEWORK

Career Framework

Level	IC Track	Level	Manager Track
S0	Technical Support Engineer - Intern		
S1	Technical Support Engineer		
S2	Senior Technical Support Engineer		
S3	Principal Technical Support Engineer	SL1	Lead - Technical Support
		SL2	Manager - Technical Support
		SL3	Senior Manager - Technical Support
		SL4	Associate Director - Technical Support

ROLE SUMMARIES
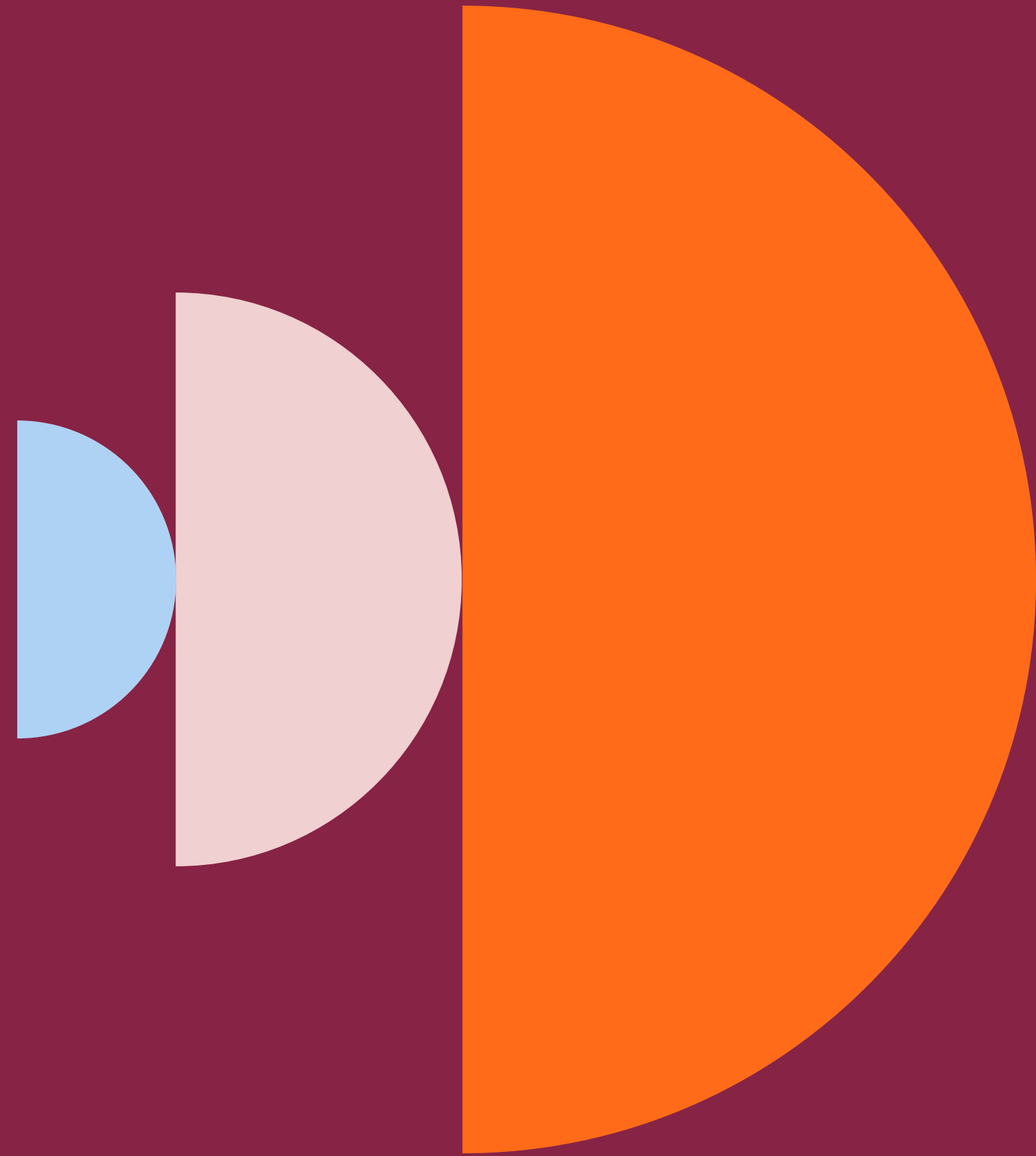
S1 - Technical Support Engineer

You deliver value to customers by addressing challenges faced by them and the internal teams supporting their DAP implementations. You constantly enhance your technical expertise and product know-how for delivering accurate and fast resolutions to the customers.

01 Ticket Resolution

- Troubleshoot & resolve issues encountered by customers, IDs & CSMs

- Report complex issues to engineering or the product teams

- Remove roadblocks, handle escalations & assist customers with their issues

02 SLA Adherence

- Maintain compliance with all SLAs set for the role

S2 - Senior Technical Support Engineer

You leverage your expertise to review and guide your team members' output, and ensure adherence to all functional SLAs. You participate and lead custom implementations as required, and guide others on the same. You actively collaborate with other internal teams like Engineering, Product, Customer Advocacy, Customer Success Managers, etc to build internal knowledge base and capture customer insights.

01 Ticket Review & Tracking

- Review the code written by colleagues

- Ensure all incoming tickets are timely resolved

- Keep track of tickets that coming in the absence of the team lead

- Handle Customer/CSM escalations

02 Product Ownership

- Document & Review Custom Implementations

- Build knowledge & expertise across various Applications & Systems

- Work with Customer Advocacy teams to conduct customer success stories, workshops, etc.

03 Regional Responsibilities

- Supervise & oversee teams operations in lead's absence, and ensure smooth operations during the shift

- Handle JIRA movement from SL to SUCC

S3 - Principal Technical Support Engineer

You actively build specialisation in your domains, and drive your team's functional knowhow and upskilling in those domains. You oversee issue resolution for priority accounts in your domains/ regions of operation, and ensure fast closure on all open tickets and escalations. You role model right behaviours and competencies for the team to learn from, while providing technical guidance as required.

01 Ticket Management

- Facilitate monthly audit of Tickets - evaluate quality metrics and guide the the TSE/Sr TSE to improve on those parameters

- Track escalated tickets (JIRAs)

- Handle Customer/CSM escalations

02 Specialization

- Specialize in verticals such as HCM, CRM, ICM, etc.

- Share learnings from areas of expertise with the team

- Act as a coach for other team members working on or wanting to build expertise in the same industries / solution areas

03 Product Ownership

- Learn & document application intricacies, patterns, frameworks for effective learning to become a Subject Matter Expert

- Record trends, patterns & customer pain points with data to share insights with Product/Engineering Teams & the Leadership

04 Regional Responsibilities

- Mark the priority accounts from the allocated regions, supervise & audit all the tickets for those accounts

SL1 - Lead - Technical Support Engineer

You are a player-coach - you manage issue resolution for your accounts/regions, as well as oversee the on-the-job performance for team members assigned to you. You constantly guide, mentor and coach them for faster & more accurate deliverables, and work towards building your managerial skillset and behaviours.

01 Ticket Management

- Assign tickets to appropriate team members & facilitate their closure

- Assign shift hand over tickets and make sure the due process is followed

- Keep track of SLAs & help the team in closing the tickets if required

02 SLA Adherance

- Identify the issue mapping it as P1/ P2/ P3 & accordingly plan the support, looping in the relevant teams as required

- Manage the team's backlogs, if any

- Ensure faster resolutions & faster updates to customers

03 Regional Responsibilities

- Lead Customers, Accounts & tickets for a region

- Resource planning for lean periods, holidays and weekend shifts

- Join customer / internal escalation calls to aid issue resolution

04 People Management

- Supervise, mentor & guide team members on the job

- Ensure policies, practices & procedures are understood & followed by the team, & their conduct aligns with Whatfix Principles

- Set & monitor the learning outcomes of the team

SL2 - Manager - Technical Support Engineer

You leverage your vast knowledge and expertise across various applications and systems to define Blueprint for Whatfix support in newer areas/applications. You ensure OKR achievement for all team/regions/industry verticals tagged to you. You work towards building a high performing team, and provide ample guidance/mentoring/coaching to the ICs and Leads to achieve their goals.

01 Ticket Management

- Build & maintain processes around ticket management
- Drive the team to build reusable code that can be easily adopted across customers
- Maintain 100% compliance on the contractual SLA
- Ensure proper triaging standards are maintained
- Identify process gaps & enable the team to overcome those

02 Product Ownership

- Own coordination and triage with product and engineering teams for issues / patterns / pain points, and system & product improvement at product-area level

03 Regional Responsibilities

- Track of the Customer Satisfaction Score and ensure that it is above the industry average
- Regularly collaborate with the engineering team, and set practises based on the geography managed

04 People Management

- Set goals & objectives for all team members to achieve of operational results
- Drive career conversations, performance management & feedback conversations for all team members
- Ensures understanding of & compliance to org policies, practices & procedures

SL3 - Senior Manager - Technical Support Engineer

You are a seasoned people manager with deep insights on technical issues resolutions across industries and regions. You leverage your knowledge & expertise to formulate and implement short term strategies for the Customer Support function, and enable your team to implement the same. You ensure managerial upskilling to build a positive & productive work culture within the team.

01 **Ticket Management**

- Set strategic direction for the ticket review to improve efficiency, optimization, etc.
- Develop & implement policies & procedures for reviewing tickets
- Focus on reducing the time spent per ticket by the team
- Analyse the reason behind drop in resolution or the first response time &

02 **Functional Excellence**

- Decide the functional strategy for the assigned region and enable the team to realize the same

- Ideate and design strategies to monetize Support provided to clients, and execute them via the team.

03 **People Management**

- Mentor the people managers to help develop their people managerial skills and drive employee-critical interventions within their teams

- Ensure all people-oriented org practices, policies and processes are adhered to

SL4 - Associate Director - Technical Support Engineer

You are a functional leader, and you leverage your expertise to design the Customer Solutions roadmap to meet the Org and BU OKRs. You ensure support continues to be a much appreciated feature for customers and advantage for Whatfix value proposition. You design interventions to meet current & future business needs. You also role model the leadership behaviours you wish to build within the function.

01 Functional Excellence

- Ideate & set the short-to-medium term vision for the function, in alignment with the BU and Org roadmap, & plan functional & people interventions accordingly

- Collaborate with the Engineering & other teams to ensure Whatfix Customer Support remains industry-best, & strategize on monetizing support

02 SLA Adherence

- Ensure team-level compliance with all SLAs

- Drive all managers to leverage their knowledge & expertise across various Applications & Systems to define Blueprint for Whatfix support in newer areas/applications

- Analyze metrics data to catch the deviations & fix them on an immediate basis

03 People Management

- Drive resource planning, succession planning, managerial pool upskilling

- Mentor the managers to help develop their managerial skills & drive employee-critical interventions

- Offer coaching to team members when required & guide people managers on doing the same
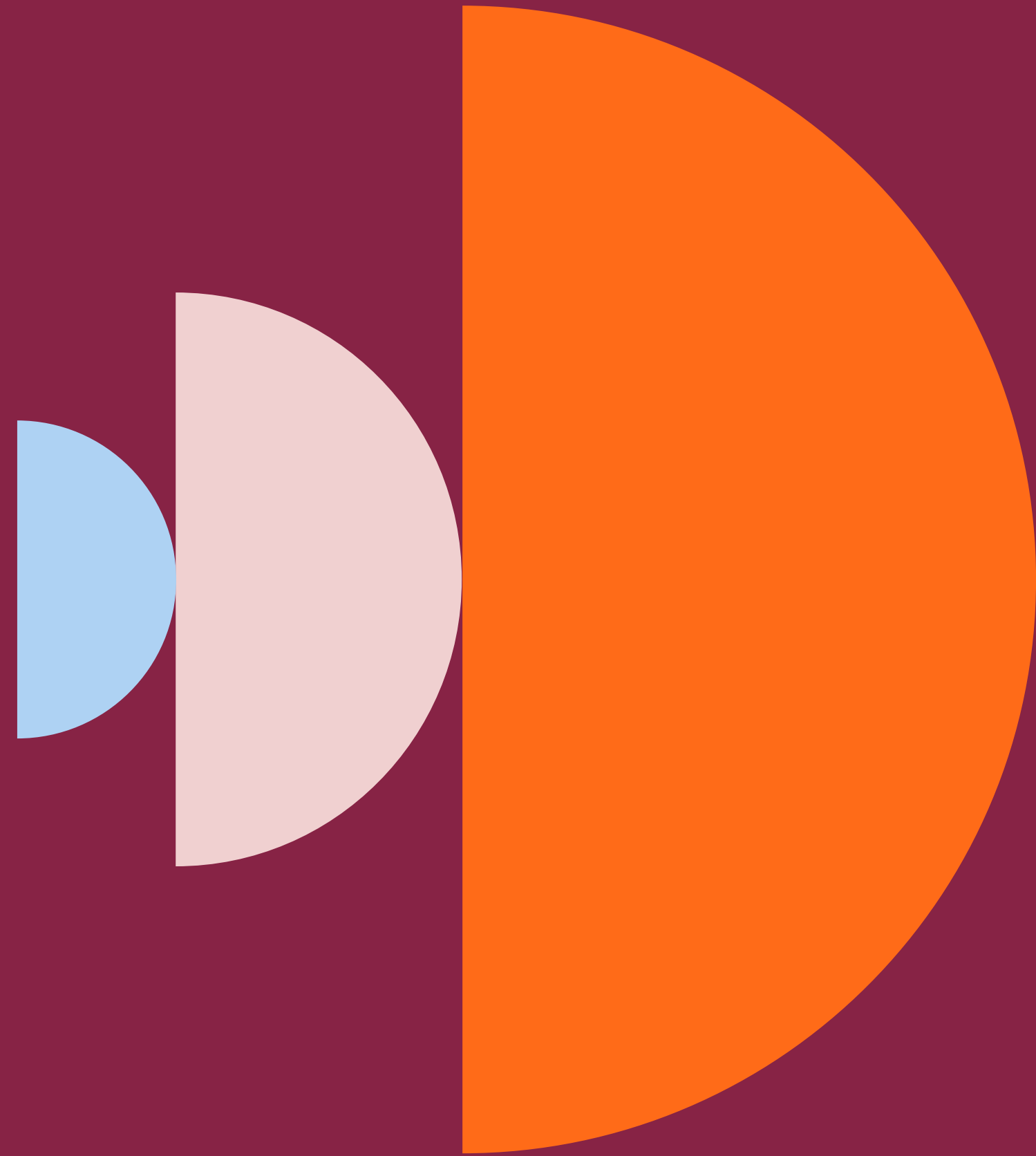
ROLE PROFILES
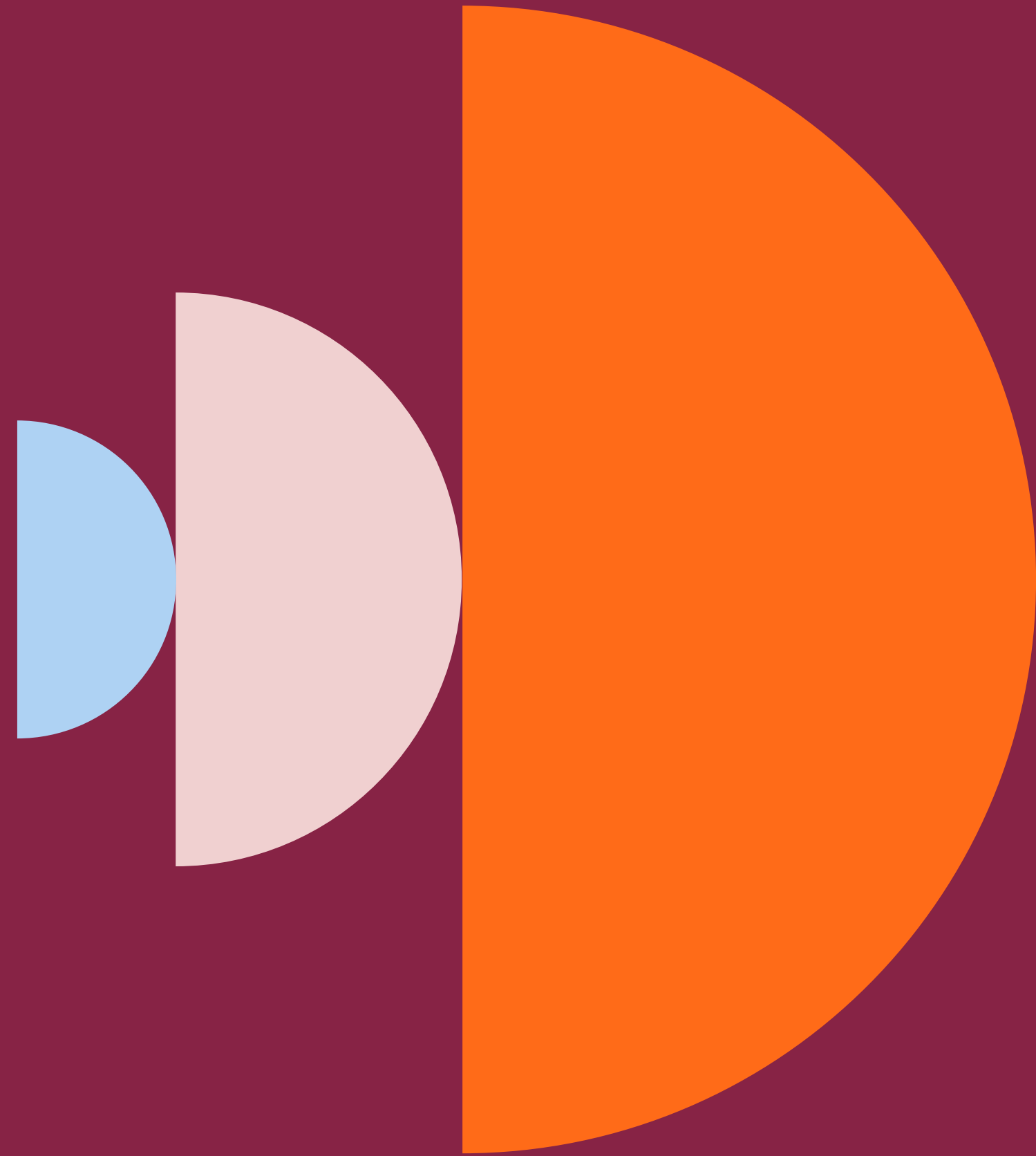
Click Here to access the detailed Role Profiles

COMPETENCY FRAMEWORK

Competency Framework

COMPETENCIES

What They Are

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

FRAMEWORK

How it is structured

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

BEHAVIOURS

Indicators of Competencies

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

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Customer Support Competency Framework

Customer Centricity

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

Problem Solving

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

Drive For Results

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

Collaboration

Collaborate with colleagues to achieve results in alignment with the overrall business objective
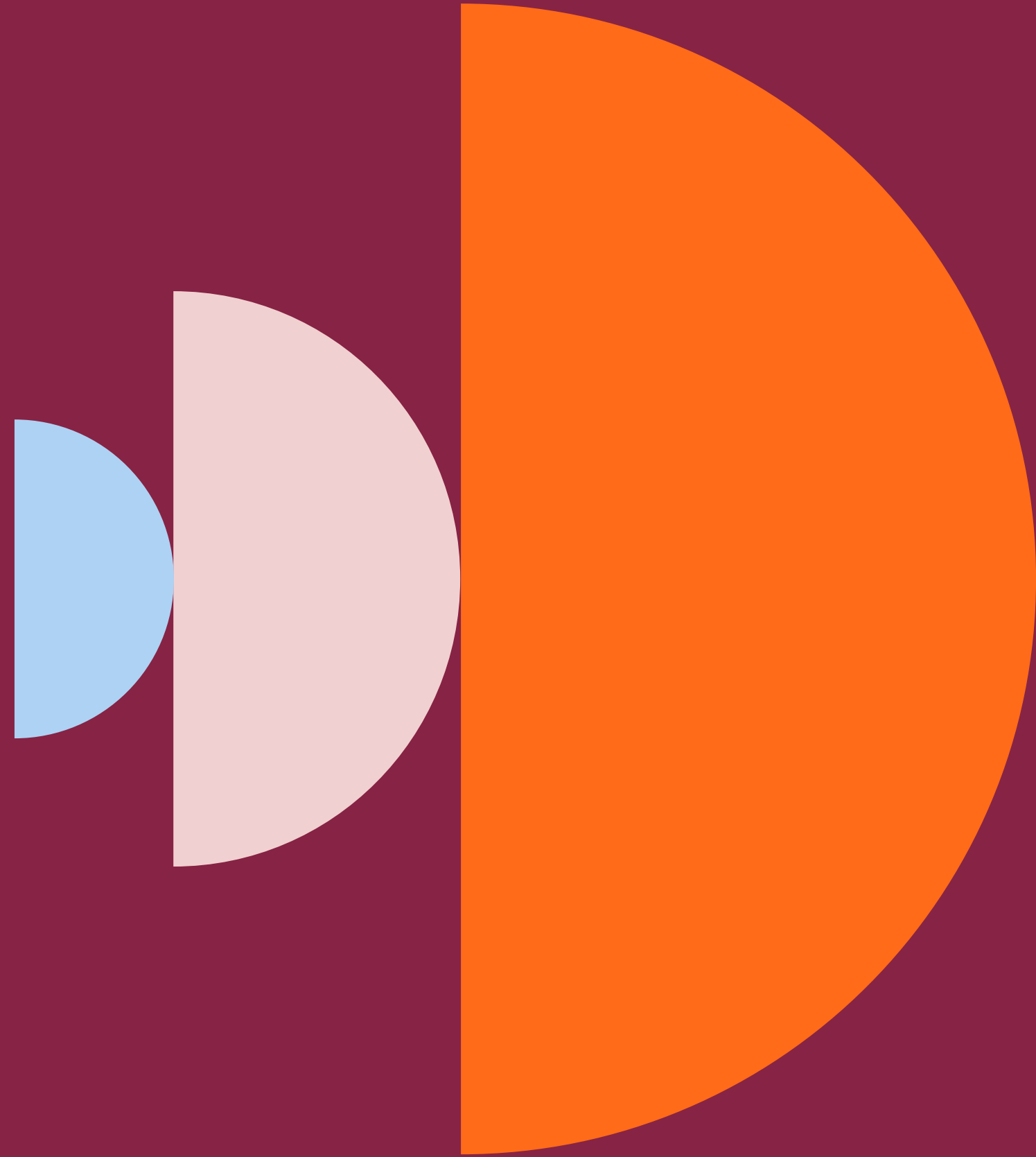
Strategic Communication

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

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Click Here to access the detailed Competency Framework

FAQ

FAQ - Career & Competency Framework

How should I interpret the career framework?

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

How should I interpret the competency framework?

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

FAQ - Role Profiles

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

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

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

Thank you!

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