



# Digital Adoption Consulting (DAC) Team

## Career & Competency Frameworks

V1.0 - March 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 DAC 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
- 3 Career Tracks identified for employee growth:
  - Individual Contributor (IC)
  - Expert IC
  - People Manager

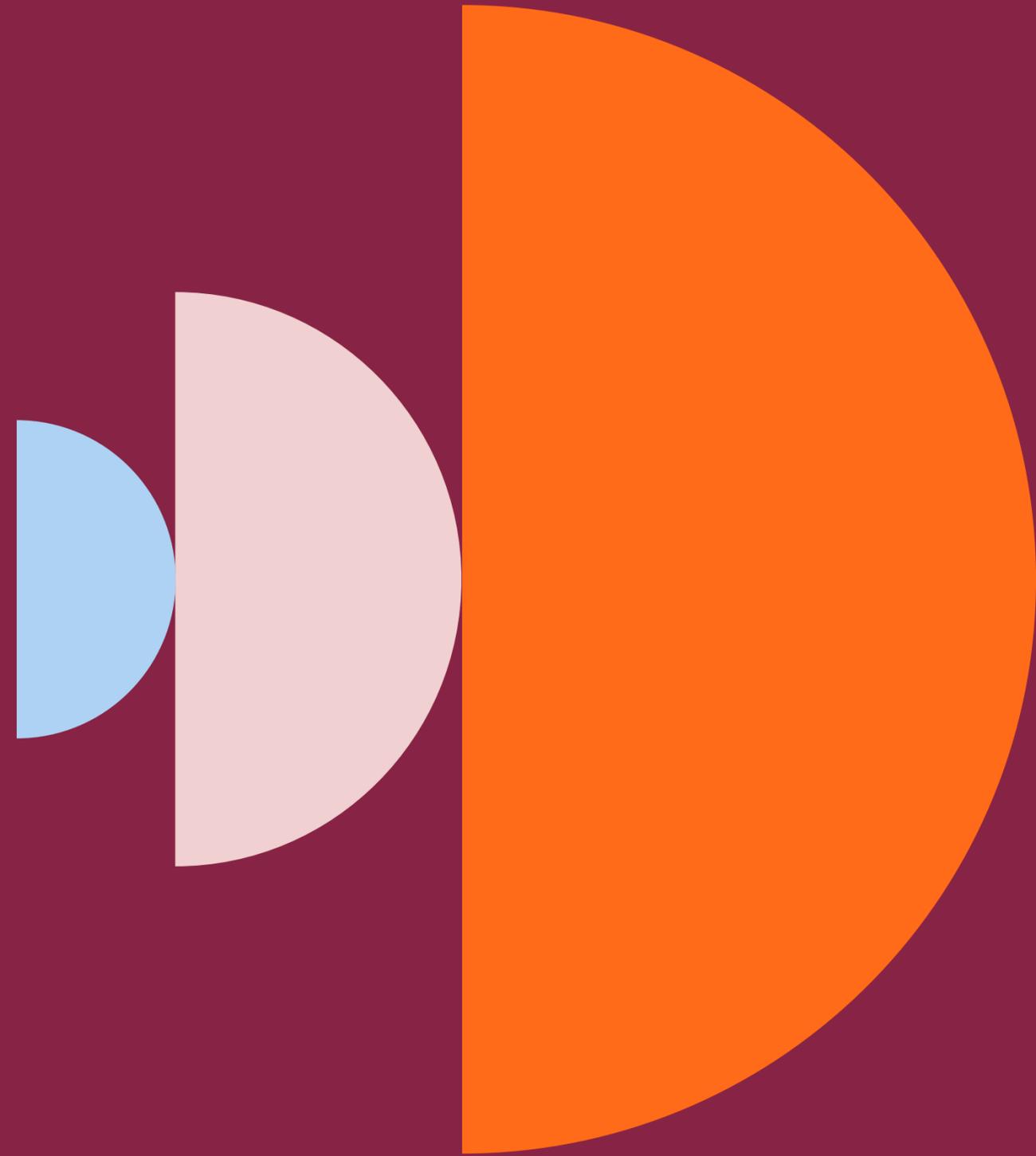
# Roles Profiles

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

# Competency Framework

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

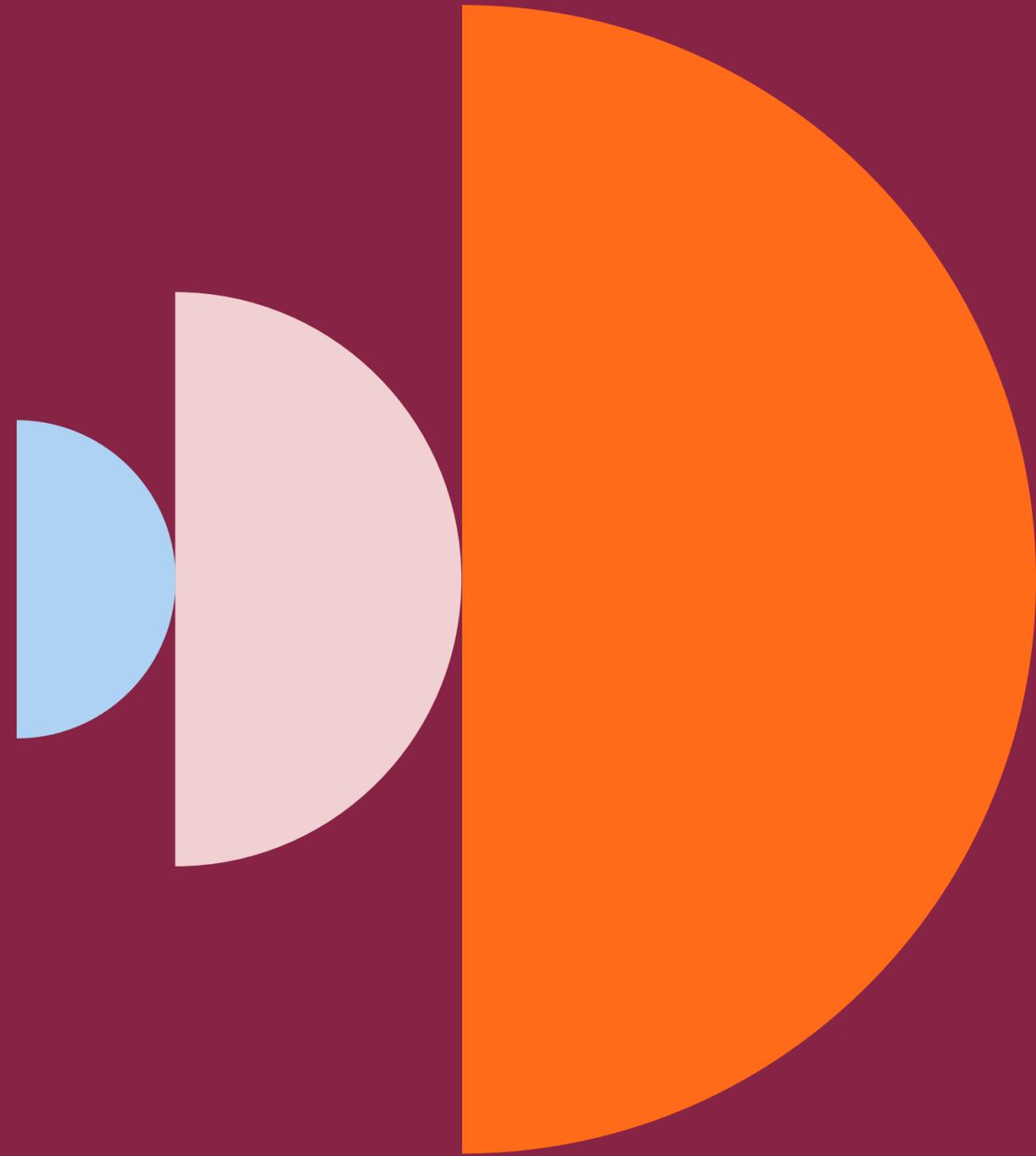
# CAREER FRAMEWORK



# Career Framework

Level	IC Track	Level	Expert IC Track	Level	Manager Track		
E0	DA Intern						
E1	DA Associate						
E2	DA Specialist						
E3	DA Sr. Specialist	EX1	Digital Adoption				
E4	DA Lead		Consultant				
		EX2	Digital Adoption	EL1	Manager DAC		
			Advisor	EL2	Sr. Manager DAC		
						EL3	Associate Director DAC
						EL4	Director DAC

# ROLE SUMMARIES



# E1 - Digital Adoption Associate

You understand customer context, gather insights from internal Whatfix teams, ideate and pitch solutions for the customers' use cases. You create and review content to meet customer objectives, and maintain an open line of communication with them. You up-skill yourself on Whatfix DAP skillset to stay on top of things.

## 01 Customer Connect

- Initiate customer connect, investigate customer context and landscape, ideate on best possible solutioning for their use cases
- Empower customer to maximize Whatfix potential by acting as a Digital Adoption Specialist

## 02 Troubleshooting

- Collaborate with the SE team to fix the debugging issues reported by the customer
- Proactively engage with Solutions team to address broken flows / platform issues

## 03 Enablement

- Leverage available resources for constant skill development
- Become a certified Whatfix Digital Adoption Specialist

# E2 - Digital Adoption Specialist

You leverage your expertise and experience of working on complex customer pain points, contexts & use cases to ideate and share the best ways to meet their objectives. You proactively take up customer issues & work towards resolution on your own and in collaboration with other teams. You also actively contribute towards the larger DAC team's development.

## 01 Customer Connect & Consulting

- Help the customer understand where Whatfix product system can best fit in their ecosystem
- Articulate and conceptualize best practices across process, industry and solutions

## 02 Troubleshooting

- Rope in the right set of stakeholders to expedite resolution
- Debug L1 SE-role issues at your end if possible and update the tech team

## 03 Team Development

- Onboard & mentor new hires and help them ramp up in the new role
- Contribute frequently to Confluence & share best practices with the larger team

# E3 - Digital Adoption Senior Specialist

Your understanding of customer context & Whatfix capabilities drives the onboarding & implementation projects - and you use to your on-ground experience to develop case studies. You drive demos in your area(s) of specialization and act as a consultant for customers by building an external focus & providing industry insights & references to the customer as needed.

## 01 Customer Connect & Consulting

- Act as the first level of escalation for issues arising for the internal escalations within the projects managed
- Build an external / industry focus - develop industry knowledge, create learner personas in those industries

## 02 Troubleshooting

- Debug L1 SE-role issues at your end if possible and update the tech team
- Monitor analytics data post-implementation to optimize Whatfix feature usage, determine scope of improvement

## 03 Team Development

- Participate or lead at least 1 internal project to improve process efficiency within the team
- Support the hiring initiatives by participating in campus PPTs, joining interview panels and vetting candidates as needed

# E4 - Digital Adoption Lead

You are a player-coach. You drive insight gathering, project planning and solutioning for assigned accounts. You benchmark industry best practices for development of the larger DAC team. For team members aligned to you, you oversee their on-the-job performance, ensure compliance and data hygiene, and provide guidance as needed.

## 01 Customer Connect & Consulting

- Support the team to define & agree on the project plan, scope, timelines & dependencies for implementation
- When working with specific a/c, benchmark practices/ focus areas against other players in that space

## 02 Governance & Compliance

- Generate and share required reports (as per RASCI matrix) with relevant stakeholders
- Ensure aligned team members are meeting compliance mandates

## 03 Team Development

- Drive resource utilization, cross-collaboration and competency development within the team
- On a need basis, oversee & manage on-the-job performance of aligned team members

# EX1 - Digital Adoption Consultant

Your knowledge, expertise and customer experience makes you proficient in core DAC responsibilities, program management and technical implementation. For the customer, you are a seasoned consultant driving project success, and for the DAC team, you are an internal expert in the area(s) of specialization. You actively up-skill yourself & support the team's development.

## 01 Customer Connect & Consulting

- Present product showcase demos on various use cases/application types to the customers/potential customers
- Help the client understand where the Whatfix product system can fit best in their ecosystem

## 02 Program Management

- Capture high-level customer requirements, draft project plans & manage its end-to-end execution
- Oversee resource management and drive collaboration with cross-functional teams

## 03 Team Development

- Build simulations for beta features, and identify opportunities for its implementation with early adopters
- Certified on Whatfix Digital Adoption Associate, Content Specialist, Solution Specialist & Project Mgmt to improve the team competence

# EX2 - Digital Adoption Advisor

You are a subject matter expert for your area(s) of specialization. You influence Whatfix roadmap and implementation for customers in those areas. You also drive DAC team development in those domains/industry verticals and join demos as an SME consultant. You actively develop cross-specialization skillset, and continually expand your breadth of expertise.

## 01 Customer Connect

- Lead the discovery & ideation process to find the best fit for the customer, and actively dig for newer avenues of Whatfix utilization & creative ways of addressing customer problem statements
- Leverage expertise on user journeys for different applications in area of focus for maximized business outcomes

## 02 Consulting

- Leverage expertise to make user journeys more seamless than before
- Be a CoE for identified area(s) of specialization, and influence Whatfix roadmap in customer organizations in those domains

## 03 Team Development

- Conduct workshops / drive enablement of the team in area(s) of specialization
- Promote functional competence within the team
- Review and approve use cases developed by the team in area(s) of specialization

# EL1 - Manager - Digital Adoption Consulting

As a people manager, you ensure your team drives and executes the project seamlessly. You continuously partner with internal & external stakeholders to set expectations, handle escalations, develop & maintain quality standards. You coach your team to develop a consultative skillset, proactively monitor the success metrics & intervene as needed.

## 01 Customer Connect & Consulting

- Understand the purpose of various customer IT & business applications, processes, and user persona
- Keep track of and provide regular updates to senior management on the business metrics, highlights, challenges
- Coach & develop consultative skills (industry, process, product) in the team

## 02 Team Development

- Lead a team of DA Specialists, mentor & guide them to achieve business
- Partner in the development of the team competency
- Define, proactively track & measure KPIs on utilization, CSAT, adoption, etc
- Take end-to-end accountability of onboarding new hires & tools activation

# EL2 - Senior Manager - Digital Adoption Consulting

You expertly manage a team of ICs and people managers. Apart from ensuring successful project deliveries, you also execute project audits. You work towards functional & managerial skill development of your team, and conduct regular check-ins to ensure there is clarity on role expectations and constant feedback going to the team.

## 01 Customer Connect

- Partner with internal & external stakeholders to set expectations, handle escalations, maintain quality of delivery, define & optimize processes, develop standards, run internal initiatives, drive knowledge management, create best practice playbooks, etc.

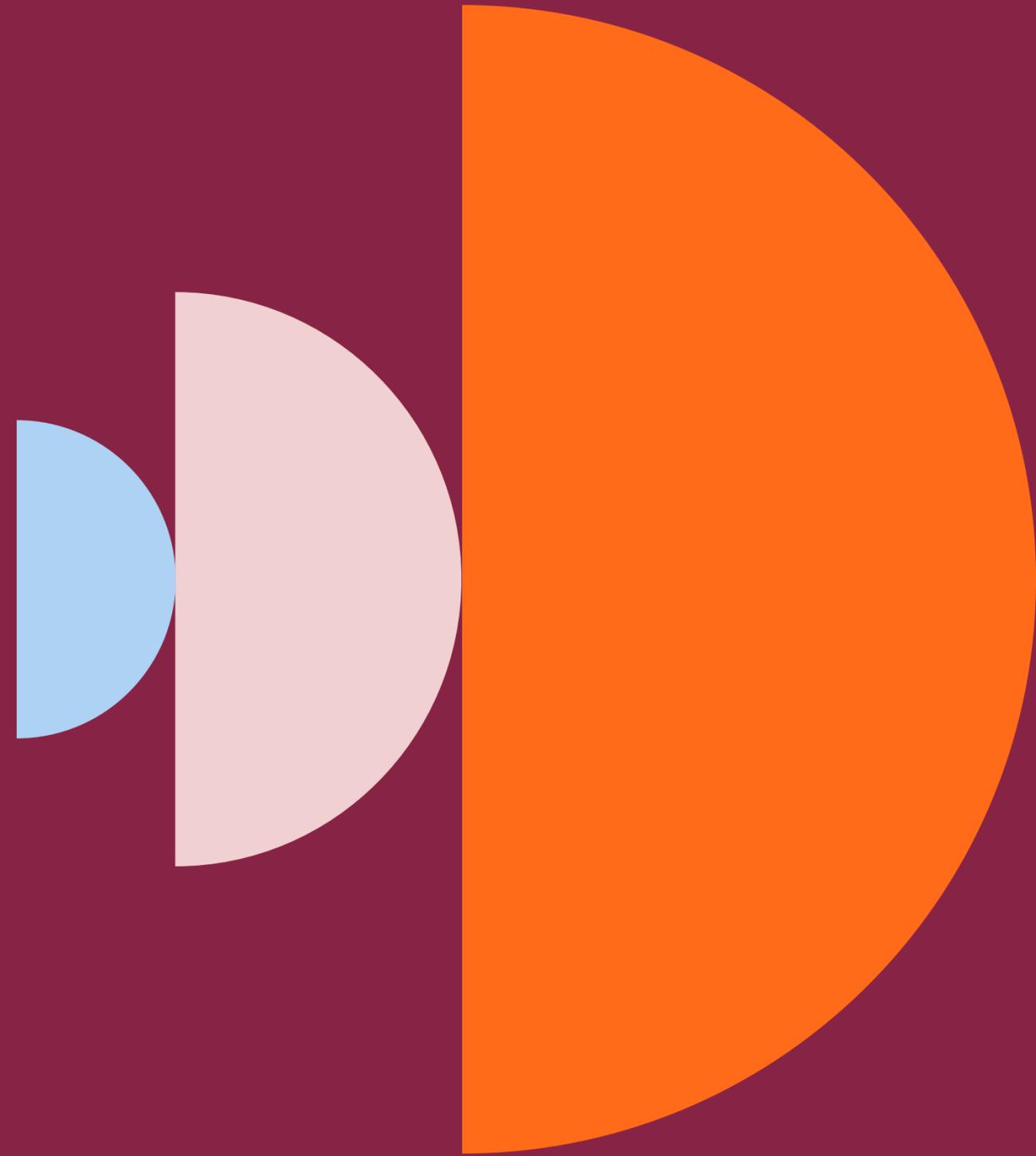
## 02 Team Performance

- Keep track of & provide regular updates to senior management on the business metrics, highlights & challenges
- Ensure the team is sufficiently prepped before taking on customer calls / having 1:1 customer interactions

## 03 Team Development

- Execute succession planning & build talent pipeline
- Groom first time managers to develop the right managerial skill set
- Run continuous improvement initiatives & increase process efficiency across the board
- Participate in hiring process for senior roles, manage workload distribution

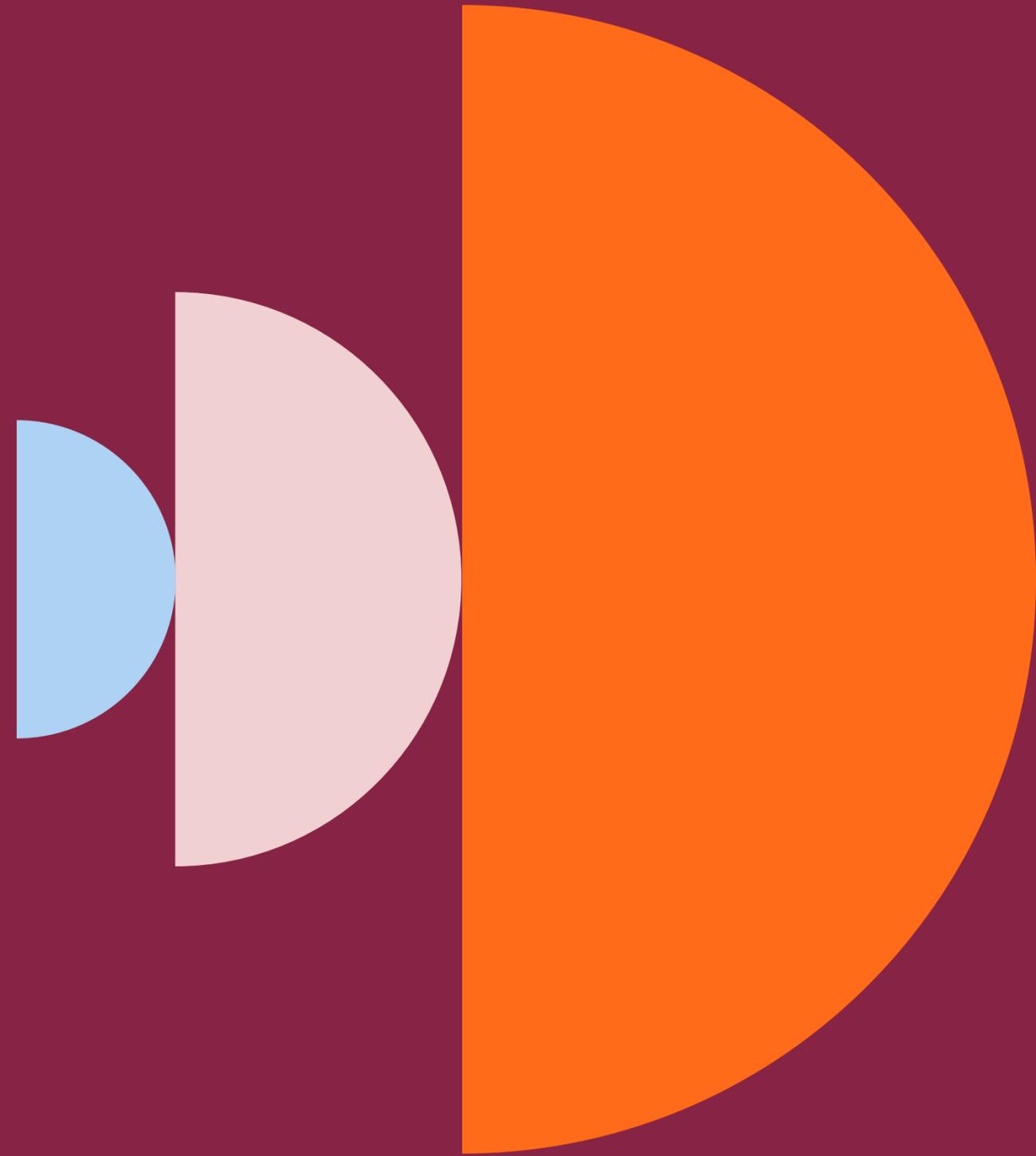
# ROLE PROFILES





**Click Here** to access the  
detailed Role Profiles for  
the DAC Team

# 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 DAC 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**'

# DAC 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



## Consulting Mindset

Develop the tools & techniques to consult & advise customers thereby becoming a partner in problem solving to meet their business needs

## Stakeholder Management

Effectively build and manage relationships with internal and external stakeholders, and engage them in a planned and meaningful way to meet objectives on projects

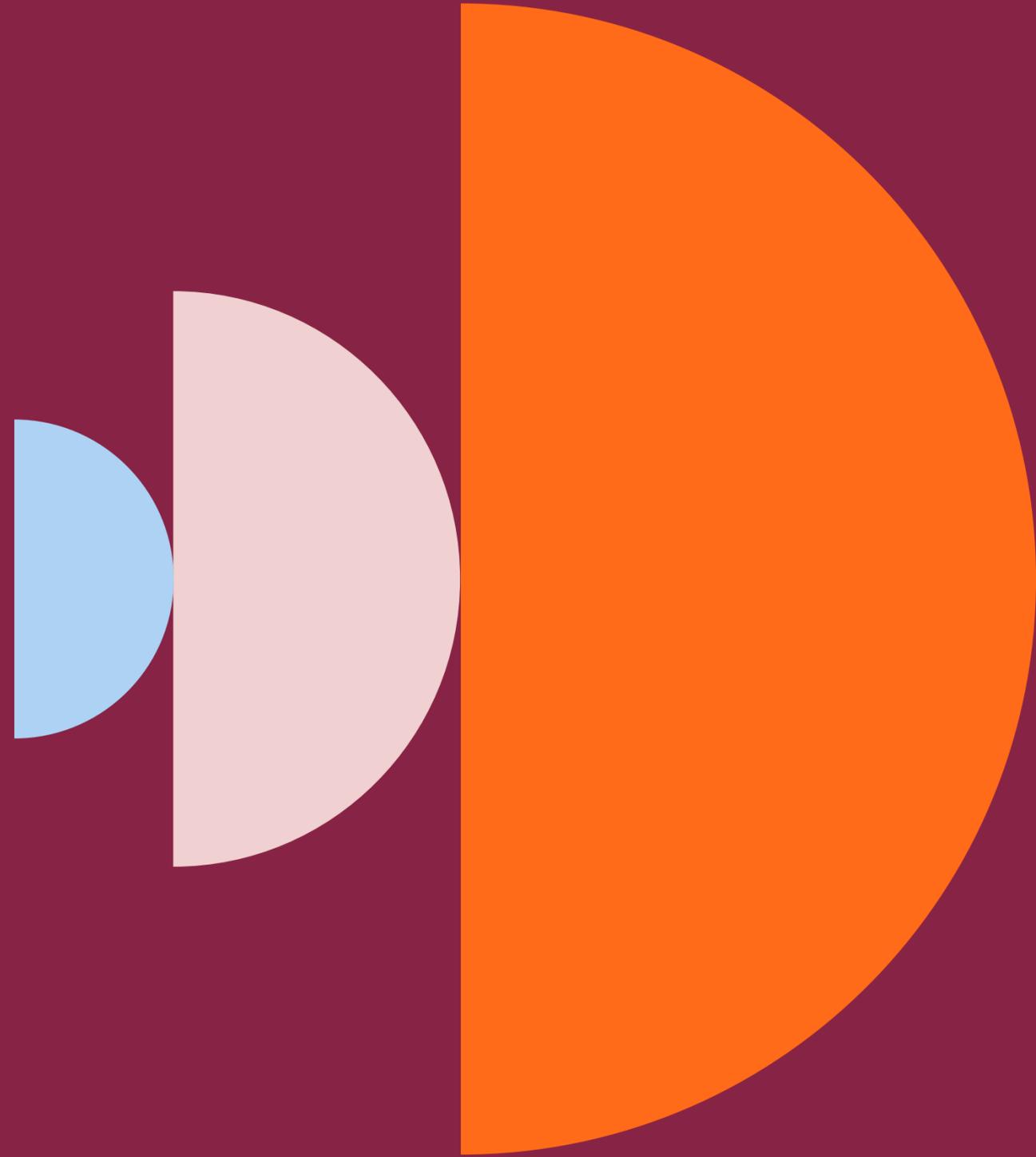
## Strategic Communication

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



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

FAQ



# FAQ - Career & Competency Framework

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

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

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

The framework outlines different behaviours an individual needs to exhibit at different levels and in different roles in the DAC 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!

