# Whatfix

# Product Leveling System

Update History

| Version | Date | Updated by | Remarks |
|---------|------|-----------|---------|
| 1.0 | October 3, 2023 | Kapil Jaiswal | Document Drafted & Circulated |

At Whatfix, we are building a new category of software, which requires a lot of innovation. Our goal is to foster an environment where our Product team can work more efficiently, iterate faster, and make informed business decisions across the entire product life cycle, from identifying problems to measuring outcomes.

To help our team members excel in their careers, we have developed a set of guiding principles for creating a Jobs Framework. This framework will enable team members to understand their career level and take ownership of their career progression. They will also be able to identify the skills required to move to the next level and be prepared to take on additional responsibilities when the business requires them.

The Jobs Framework enables managers to have productive discussions about performance, career growth, and expectations. It fosters transparency, consistency, and equity while empowering team members to drive their careers and enhance our product organization's efficiency and innovation.

## Few Guiding Principles

**Flatter Hierarchy**

We want to build an organizational structure with minimal levels of management layers between individual contributors and top leadership. In such a system, decision-making is decentralized, promoting open communication and faster responsiveness. This structure encourages employee empowerment, promotes innovation, and facilitates quick adaptation to changing circumstances, leading to increased agility and efficiency.

**Being Hands-On**

As a company, we rely on our managers and leaders to guide our teams effectively. It is crucial for them to remain hands-on and involved in the day-to-day operations. This means that they should be conducting PRD reviews and if required write PRDs, stay up-to-date with product developments through constant testing and usage, keep in touch with customers to gather insights, and closely monitor product health metrics.

**Prove first before leveling up**

Level-up happens only after the employee is able to prove that he/she has already operated at the new scope & demonstrated the impact expected. Level-up does not add additional responsibilities, Level up happens only after additional responsibilities are already handled. It is not mandatory that each & every behavior is exhibited but needs to prove that all categories are covered.

**All work streams under Product Org are treated equally**

The criteria of level up is exactly the same, individuals need to handle a bigger scope or make a larger impact & show the right behaviors to grow irrespective of their work stream.

**Years of experience are not mandatory to level up**

Years of experience are required to master anything, It is not enough to be able to do it once, It has to be repeatable. A minimum of 1.5 years of experience in the current role is required to be considered to level up apart from that there are no minimum years of experience requirements for any level. The years of experience are only a guide to set expectations.

**Levels are additive**

Every level is additive to all previous levels. Responsibilities of all previous levels are expected when you are at a level.
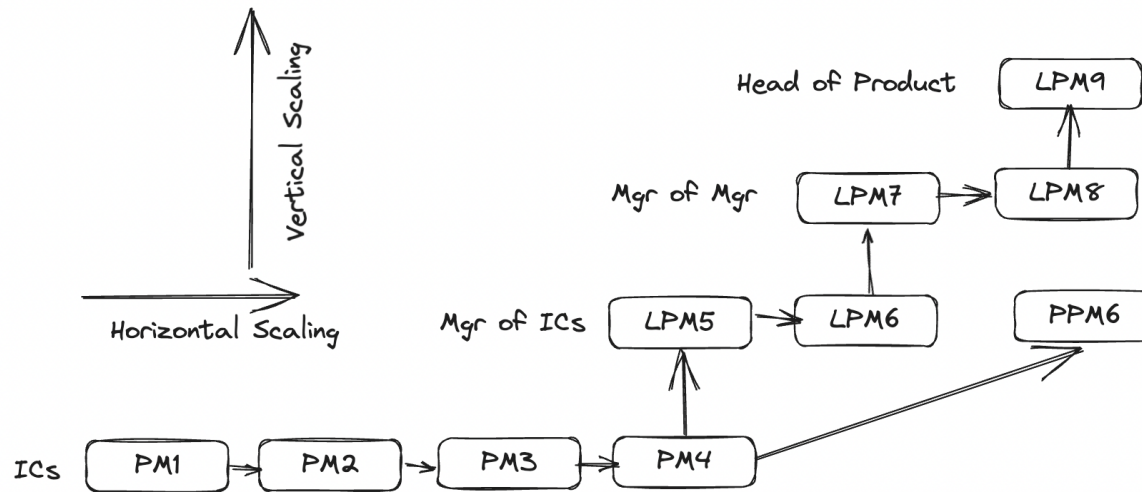
**Competencies per Job**

For each Job Framework, we have identified categories for describing competencies we expect to see at each level. Below we describe the definitions of each category:

- **Scope & Influence**: The scope of the responsibilities and ways each job influences product, team members, or company strategy. This ranges from focus on own work to cross-company and external influence in terms of product, team members, customers, or company strategy.
- **Complexity & Problem solving**: The level of complexity and problem-solving skills in day-to-day responsibilities and projects. This ranges from low, and moderate to highly complex problems that influence the accomplishment of long-term business goals.
- **Functional Competencies**: Competencies that are specific per level and per function(PM/IDG/Ops/Data). These are built out by each function themselves.
- **Values Competencies**: Competencies that are aligned with our core cultural values,

Besides the above competency categories typical reporting structure is also added to the Job Frameworks:

- **Typical Reporting Structure**: This shows the typical reporting structure for that Job level.



| | Product Management |
|---|---|
| Individual Contributors | - Product Manager<br>   ○ PM1<br>   ○ PM2<br>   ○ PM3<br>   ○ PM4<br>- Principal PM<br>   ○ PPM6 |
| People Managers | - Leader Product Management<br>   ○ LPM5 |

|  |  | ○ LPM6 |
|  |  | ○ LPM7 |
|  |  | ○ LPM8 |
|  |  | ○ LPM9 |

**PM Jobs Framework**

| Level | Scope | Typical Reporting | Functional Competencies & Skill |
|---|---|---|---|
| PM1 | Entry level. No prior PM experience. Generally will be in 6 months in this role and if show good PM acumen should get promoted to PM2. Can start with owning a feature or a small POD under guidance from PM3 or PM4 | IC and reporting to LPM5 or above. | |
| PM2 | Responsible for a feature set or a POD of low-level complexity*. | IC & Reporting to LPM5 or above. | Outlined |
| PM3 | Responsible for a POD of mid-level complexity | IC & Reporting to LPM5 or above | |
| PM4 | Responsible for 1-2 PODs of mid to high level of complexity | IC & Reporting to LPM6 or above | |
| PPM6 | Responsible for a POD or cross-product area of high complexity<br>Works on early ideas to get them to PMF<br>The next level is lateral movement to LPM5 or LPM6. | IC & Reporting to LPM7 or above | |
| LPM5 | Managing 1-2 related PODs<br>Works on early ideas to get them to PMF | Mgr of 1-2 ICs & Reporting to LPM7 or above. Acts as player/coach. | Outlined |
| LPM6 | Managing multiple PODs of varying complexity<br>Scales early PMF ideas to 1m$ | Mgr of 3-5 ICs. Reporting to LPM7 or above | |
| LPM7 | Managing/Scaling a product line from 1-10m$ OR<br>Managing/Scaling a product line from 10-100m$ OR<br>Managing an entire Product Tribe supporting revenue till 100 m$ | Mgr of Mgr as well as Mgr of ICs. Managing 3-5 direct reports in the hierarchy.<br>Reporting to LPM9 or above. | |
| LPM8 | Managing/Scaling a product line from 100-250m$ OR<br>Managing/Scaling multiple product lines from 1-10m$ AND/OR 10-100m$ | Mgr of Mgr as well as Mgr of ICs. Managing 3-5 reports in the hierarchy. | |

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| | OR<br>Managing an entire Product Tribe supporting revenue till 500 m$ | Reporting to LPM9 or above. | |
| MP9 | Managing the entire product portfolio. | Reports to CXO/CEO | |

*Complexity - The complexity of a product area can be defined based on the amount of risk involved along different dimensions such as technical complexity, execution complexity, market complexity, and usability complexity*

**PM-Competencies**

At each level, it is anticipated that individuals will assume the responsibilities associated with their previous levels of experience and expertise.

1. **IC Roles**

   a. **Product Skills**

| Skills | Description | PM2 | PM3 | PM4 | PPM6 |
|---|---|---|---|---|---|
| User/Customer Knowledge | - Is the target user persona identified and understood well | - Is the target user persona identified and understood well | | | - Specializes in working on new product ideas that do not have identified user personas. |
| Industry/ Domain Knowledge | - Is the target market aware and understanding there?<br>- Are the direct and indirect competitors identified and understood well?<br>- Is able to identify the themes and trends affecting the product area? | | - Is the target market aware and understanding there?<br>- Are the direct and indirect competitors identified and understood well? | - Is able to identify the themes and trends affecting the product area? | - Deep understanding of market trends, customer needs, and business goals to develop a clear vision for the product<br><br>- Is able to conduct extensive market research to identify opportunities and threats, |

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| Data Knowledge | - Is familiar with basic data toolsets and data models to understand usage patterns?<br>- Is familiar and expert on how users are using the product? | - Is familiar with basic data toolsets and data models to understand usage patterns?<br>- Is familiar and expert on how users are using the product? | | | |
| UX/Design Knowledge | - Is familiar with basic design heuristics and able to apply the same?<br>- Understands and empathizes with different flavors of design( Information Architecture, User research, User testing, Interaction design, Visual design) and is able to apply/use as per the needs. | - Is familiar with basic design heuristics and able to apply the same? | - Understands and empathizes with different flavors of design( Information Architecture, User research, User testing, Interaction design, Visual design) and is able to apply/use as per the needs. | | |
| Technology Knowledge | - Understand the underlying tech stack and can discuss with engineering basic building blocks and rough estimates to make scope changes as needed(faster time to market/early validation/tech risk). | - Understand the underlying tech stack and can discuss with engineering basic building blocks and rough estimates to make scope changes as needed(faster time to market/early validation/tech risk). | | | |
| Business & Company Knowledge | - Is the business model well understood?<br>- Understand how other functions (marketing, sales, legal, success) operate and be able to work with them along with their constraints. | - Understand how other functions (marketing, sales, legal, success) operate and be able to work with them along with their constraints. | - Is the business model well understood? | | - Expert at business case creation delivering cross-section, intra-section, and company-wide investment cases for consideration by Product Leadership- |

| Operational Knowledge | - Understand product well and can discuss/demonstrate to internal/external stakeholders<br>- Can respond clearly to queries both internal and external<br>- Able to articulate the value proposition of the product and provide "raw material" to marketing/GTM | - Understands product area well and can discuss/demonstrate to internal/external stakeholders<br>- Can respond clearly to queries both internal and external<br>- Able to articulate the value proposition of the product area and provide "raw material" to marketing/GTM | | | |

b. **Process Skills**

| Skills | Description | PM2 | PM3 | PM4 | PPM6 |
|---|---|---|---|---|---|
| Product Discovery Techniques | - Is able to identify product risks and address them<br>- Is able to identify technology risks with engg and able to address them before the actual development<br>- Focussed on outcome during the discovery<br>- Able to use both qualitative and quantitative techniques to ensure we are headed in the right direction towards solving the customer problem & promised value | -Focussed on outcome during the discovery<br>- Able to use both qualitative and quantitative techniques to ensure we are headed in the right direction towards solving the customer problem & promised value (with guidance) | - Is able to identify product risks and address them<br>- Is able to identify technology risks with engg and able to address them before the actual development | | - Specializes in identifying and navigating the risks, especially for the early stage products/ideas. |
| Product Development Techniques | - Solid understanding of the product development process (Agile)<br>- PRDs delivered are of high quality which enables Engg to build products as per spec | - Solid understanding of the product development process (Agile)<br>- PRDs delivered are of high quality which enables Engg to build products as per spec | | | |

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| Product Delivery Techniques | - Able to take the product to market/customer with the help of cross functions like IDG/PMM/CS<br>- Understands the product maturity and accordingly develops the customers(Beta, GA) | - Able to take the product to market/customer with the help of cross functions like IDG/PMM/CS<br>- Understands the product maturity and accordingly develops the customers(Beta, GA) (with guidance) | | | |
| Product Optimization Techniques | -Identifies and monitors criteria(leading/lagging indicators) which shows the success of the delivered product<br>- Able to iteratively optimize the product to refine and improve the product | -Identifies and monitors criteria(leading/lagging indicators) which show the success of the delivered product (with guidance)<br>- Able to iteratively optimize the product to refine and improve the product | | | |

c. **People Skills**

| Skills | Description | PM2 | PM3 | PM4 | PPM6 |
|---|---|---|---|---|---|
| Team Collaboration Skills | - Is collaborating well with dev/pmm/design/idg<br>- Includes design/engg in customer discoveries for their unique insights | - Is collaborating well with dev/pmm/design/idg<br>- Includes design/engg in customer discoveries for their unique insights | | | |
| Stakeholder Management Skills | - Is the PM able to articulate and negotiate with external as well as internal stakeholders, especially senior mgmt<br>- Has PM earned the trust and credibility of making the right decision for the good of the company and the | | - Is able to articulate and negotiate with external as well as internal stakeholders, especially senior mgmt | -Has earned the trust and credibility of making the right decision for the good of the company and the customer | - Is able to work closely with executives, and other stakeholders to communicate the product vision, gain buy-in, and secure |

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| | customer | | | | necessary resources and support |
| Leadership Skills | -Team looks up to him for solving hard problems requiring tough decisions(Prioritization including Saying "No") under constraints<br>- Able to manage through influence | | -Team looks up to him for solving hard problems requiring tough decisions(Prioritization including Saying "No") under constraints<br>- Able to manage through influence | | |
| Evangelism Skills | -Able to articulate and effectively share the product roadmap & vision with his team<br>- Instill Inspiration and motivation with his team members<br>- Effective communicator | -Effective communicator | -Instill and inspire motivation among his team members | - Able to articulate and effectively share the product roadmap & vision with his team | - Often will work with smaller cross-functional teams on an early product idea. Is able to motivate and rally the team towards a shared goal. |

2. **Manager role**

    a. **Product Skills**

| Skills | Description | LPM5/6 | LPM 7/8 |
|---|---|---|---|
| Industry/Domain Knowledge | - Is the target market aware and understanding there?<br>- Are the direct and indirect competitors identified and understood well?<br>- Is able to identify the themes and trends affecting the product area? | -Are the direct and indirect competitors identified and understood well?<br>- Is able to identify the themes and trends affecting the product area? | - Is the target market aware and understanding there?<br>- Is able to identify emergent user persona and newer markets? |

| Data Fluency | -Is able to use data to generate actionable insights and leverage those insights to achieve outcomes as per the product strategy | -Is able to use data to generate actionable insights and leverage those insights to achieve outcomes as per the product strategy | - Is able to actively monitor product health metrics and influence teams to address the concerns. |
|---|---|---|---|
| Vision & Roadmapping | - Is able to define the vision of the area of work and connect with overall product strategy<br>- Is able to work with PMs to define the OKRs & prioritized roadmap as per the vision | - Is able to define the long-term roadmap of the area of work and connect with the overall product strategy<br>- Is able to work with PMs to define the OKRs & prioritized roadmap as per the product goals | - Is able to define the product strategy as per the company vision and goals |

b.  **Process Skills**

| Skills | Description | LPM5/6 | LPM 7/8 |
|---|---|---|---|
| Discovery | - Is able to identify product risks and address them<br>- Able to use both qualitative and quantitative techniques to hear the voice of the customer<br>- Able to identify white spaces or opportunities that can set the path for new product investment areas<br>- Understands market forces and customer demand to come up with pricing strategy and recommendations | - Is able to identify product risks and address them<br>- Able to use both qualitative and quantitative techniques to hear the voice of the customer<br>- Regularly talks to customers and shares key insights with the larger team | - Able to identify white spaces or opportunities that can set the path for new product investment areas<br>- Understands market forces and customer demand to come up with pricing strategy and recommendations |

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| Delivery | - Able to take the product to market/customer with the help of cross functions like PMM/CS/Sales<br>- Able to align the team and work with stakeholders to ship the product as per predefined goals<br>- Proactively identifies risks and manages team so that delivery goals are met | - Able to take the product to market/customer with help of cross functions like PMM/CS/Sales<br>- Able to align the team and work with stakeholders to ship the product as per predefined goals<br>- Proactively identifies risks and manages team so that delivery goals are met<br>- Reviews the PRDs/UX deliverables, and actively tests the product features | -Hands on with the product and can actively show demos of key product features across the products |
| Outcomes | - Identifies and monitors criteria that show success of the delivered product<br>- Able to meet the goals set as per the overall business objectives<br>- Understands revenue goals and shapes the product for those outcomes. | - Identifies and monitors criteria that show the success of the delivered product<br>- Able to meet the goals set as per the overall business objectives | - Owns revenue goals and shapes the product for those outcomes. |

c. **People Skills**

| Skills | Description | LPM5/6 | LPM 7/8 |
|---|---|---|---|
| Stakeholder Management | - Is able to articulate and negotiate with external as well as internal stakeholders, especially senior mgmt and executives | - Is able to articulate and negotiate with external as well as internal cross-functional stakeholders | - Is able to articulate and negotiate with senior mgmt and executives of both internal as well as external stakeholders |

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| Leadership | -The team looks up to him for solving hard problems requiring tough decisions under constraints<br>- Is able to manage and coach reports with the goal of helping them achieve business objectives<br>- Discuss, plan, and help the reportee achieve their career objectives | - Is able to solve hard problems for the team requiring tough decisions under constraints<br>- Is able to manage and coach reportees with the goal of helping them achieve business objectives.<br>- Discuss, plan, and help the reportee achieve their career objectives | |
| Evangelism | -Able to articulate and effectively share the product roadmap & vision with to team, customers, and other important stakeholders<br>- Instill and inspire motivation among his team members | - Able to articulate and effectively share the product roadmap with the team and customers.<br>- Instill and inspire motivation among his team members | - Is able to share product vision with customer/prospect leadership and other important stakeholders like Analysts.<br>- Works with sales on strategic deals<br>- Works with CS/AM on strategic accounts for renewal and expansions. |