

# UX Research Team

## Career & Competency Frameworks

### Update History

Version	Date	Updated by	Remarks
1.0	12 February 2023	Moulya cp	Framework added and published
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 Research 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 : R1
  - **Title** - example : UX Research Contributor
- Senior expert roles (R6X, R7X) will be defined later on as the team evolves to occupy more roles in the overall framework

### Role & Responsibilities

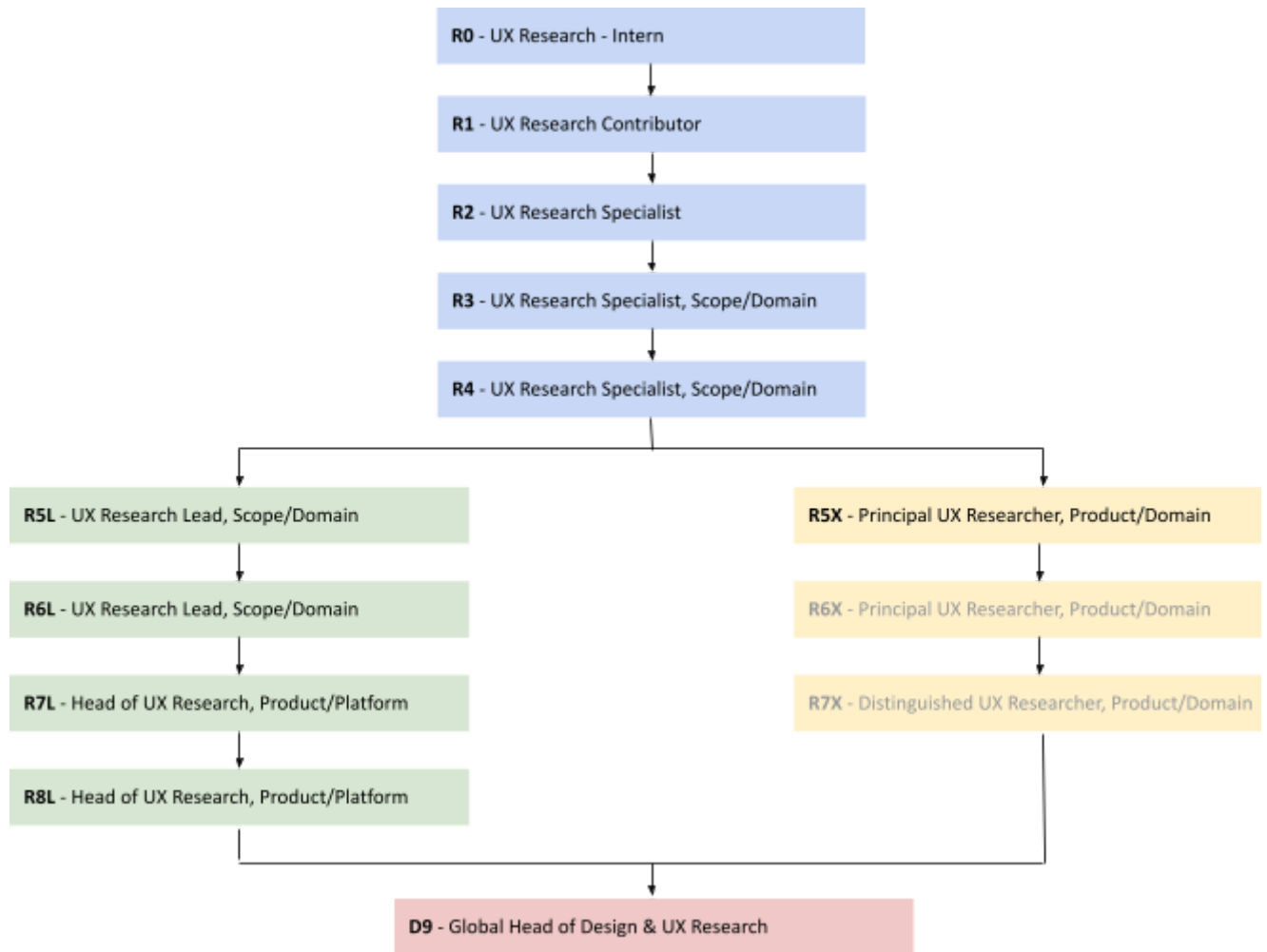
- **Expectations defined at each level**
- **R1 - R4 are IC roles**
- **R5X - R7X are Subject Matter Expert roles**
- **R5L - R8L are People Manager roles; D9 is the BU Head role**
- Each level builds on the expectations from previous level
  - Example : R2 responsibilities include R1 role + additional 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 RESEARCH

## CAREER FRAMEWORK



IC Track
Expert Track
People Manager Track
BU Head

## COMPETENCY FRAMEWORK



R0

Research Intern

KRA	Sub-Category	Activities
Core Research	Research	<ul style="list-style-type: none"> <li>• Record activities &amp; take notes during research/participation recruitment activities</li> <li>• Summarization of activities:               <ul style="list-style-type: none"> <li>○ Know and learn research - conducting research; evaluating primary, secondary, qualitative, and quantitative research.</li> <li>○ Understand and learn research methodologies and understand the demography, market, &amp; the competition.</li> <li>○ Understand and learn the large product scope; wide user base - across industries; geography and active user segments</li> <li>○ Find, learn and understand how the best user research approaches, and</li> </ul> </li> </ul>

		<p>methods can be put into implementation/practice.</p> <ul style="list-style-type: none"> <li>○ Employ communication skills and create research questionnaires for questioning to get the desired answers</li> <li>○ Learn the knack of presenting and convincing stakeholders of your research findings.</li> <li>○ Provide information that will help the team to design a product that solves their issues.</li> <li>○ Interact with the decision-makers of said products to understand product scope and target user base.</li> </ul>
	<b>Participant Recruitment</b>	<ul style="list-style-type: none"> <li>● Utilize various methods, including internal databases, Google Forms, and User Interviews, to recruit participants.</li> <li>● Learn and utilize tools/techniques like User Interviews to recruit external participants, ensuring representation from different demographics and regions.</li> </ul>
<b>Communication &amp; Collaboration</b>		<ul style="list-style-type: none"> <li>● Collaborate with Design, Product and engineering team</li> <li>● Work closely with designers for research development</li> <li>● Drive research hygiene</li> </ul>
<b>Data Hygiene</b>		<ul style="list-style-type: none"> <li>● Ensure documentation for research activities in collaboration with Product Designers/UX Writers</li> </ul>

# R1

## UX Research Contributor

<b>Role Summary</b>		Resolve function-level research problems for the assigned team(s).
<b>KRA</b>	<b>Sub-Category</b>	<b>Activities</b>
<b>Core Research</b>	<b>Project management &amp; Participant Recruitment</b>	<ul style="list-style-type: none"> <li>● Use data collation tools to review incoming research requests, ensuring all necessary information is available for project planning.</li> <li>● Assist in developing Research Protocol documents by gathering information on research goals, outcomes, and interview scripts, under the guidance of senior team members.</li> <li>● Collaborate with the research lead and senior team members to fulfill potential research needs, contributing ideas and insights as appropriate.</li> <li>● Fulfill ad hoc research support requests from designers and team members, such as assisting with data collection or analysis tasks as needed.</li> <li>● Support in executing multiple low impact projects simultaneously by prioritizing tasks based on strategic importance and project timelines, under the guidance of senior team members/lead.</li> </ul> <p><b>Participant recruitment activities:</b></p> <ul style="list-style-type: none"> <li>● Support participant recruitment efforts by utilizing various methods and tools</li> </ul>

		to reach target demographics and internal research participants.
	<b>Research interviews</b>	<ul style="list-style-type: none"> <li>● Conduct research sessions independently, including setting up interviews, employing research interview techniques, &amp; recording findings.</li> <li>● Transcribe data collected from research sessions.</li> <li>● Prepare reports, decks, and presentations summarizing research findings.</li> </ul>
<b>Communication</b>	<b>Stakeholder alignment</b>	<ul style="list-style-type: none"> <li>● Regularly update stakeholders and Research Lead(s) on the progress of ongoing projects- seek help when a roadblock is faced.</li> <li>● Address any conflicts or delays in collaboration with stakeholders to ensure timely project delivery.</li> <li>● Collaborate with designers and product managers in prototype testing.</li> <li>● Share the research work, identify next steps and recommendations for review with team coaches and lead(s) for peer input and feedback.</li> </ul>
<b>Enablement</b>	<b>Interventions</b>	<ul style="list-style-type: none"> <li>● Participate in team-level functional interventions or projects as required.</li> <li>● Actively learn principles and study additional methods of UX research.</li> <li>● Update knowledge of tools for optimizing one's research process.</li> <li>● Stay updated with all Whatfix products and features along with its technicalities.</li> <li>● Join workshops / UX research office hours to gather ideas &amp; feedback from all pods, and discuss if the right problems are being solved across the board</li> </ul>

### R1 Competencies

Competency	Behavioral Indicators
<b>Communication</b>	<p>Process alignment</p> <ul style="list-style-type: none"> <li>● I proactively ensure completeness and accuracy of information for project planning.</li> <li>● I demonstrate curiosity and eagerness to learn by collaborating with the research lead and senior team members, contributing ideas and seeking help when required.</li> <li>● I integrate feedback and corrections after discussions with team members and Lead(s).</li> <li>● I maintain video conferencing hygiene during all virtual connects.</li> <li>● I proactively work towards building my storytelling skills and learning how to set narratives.</li> </ul> <p>Presenting research outputs</p> <ul style="list-style-type: none"> <li>● I present research outputs in a clear and concise manner, ensuring that reports, decks, and presentations effectively summarize key findings and insights and are suited to the context and the needs of the audience.</li> <li>● My presentation follows a logical sequence, and I successfully present facts and evidence supporting my main ideas.</li> <li>● I present proposals &amp; ideas in a manner that is easily understood by the audience.</li> </ul>

<p><b>Learning Agility</b></p>	<ul style="list-style-type: none"> <li>● I work towards learning the ins and outs of the Whatfix design system, research tools, templates, and recruitment processes.</li> <li>● I actively learn &amp; reference industry patterns in the course of work.</li> <li>● I constantly work towards developing my research, content design &amp; content writing skills.</li> <li>● I have strong intellectual curiosity and ask relevant questions to gain a better understanding and deeper comprehension.</li> <li>● I seek internal &amp; cross-functional stakeholder feedback to improve.</li> </ul>
<p><b>Drive for Results</b></p>	<ul style="list-style-type: none"> <li>● I plan my day, prioritize my meetings, and ensure that my outreach activities are in line with my goals.</li> <li>● I keep the customer needs and expectations front and center of my design output.</li> <li>● I consistently meet the quality and performance standards set for me.</li> <li>● I ensure my deliverables meet the quality standards set for my team.</li> <li>● I demonstrate honesty, keep commitments and behave in a consistent manner.</li> </ul>
<p><b>Research Acumen</b></p>	<ul style="list-style-type: none"> <li>● I possess fundamental UX design knowledge around interaction, visual, content, and service design.</li> <li>● I am very familiar with Qualitative Research and Usability Testing tools &amp; fundamentals.</li> <li>● I am familiar with common UI design patterns, and Navi design system components and guidelines.</li> <li>● I have a fundamental knowledge of design thinking and service design methodologies.</li> <li>● I am keen to learn more about Whatfix products and their features, and actively take refresher product training courses to stay updated.</li> </ul>
<p><b>Business Acumen</b></p>	<ul style="list-style-type: none"> <li>● I strive to develop an understanding of the industry landscape, business proposition and the overall customer scope of Whatfix.</li> <li>● I deep dive to understand customer goals, short/long-term roadmap and how Whatfix can meet their requirements and create value.</li> <li>● I am keen to know more about Whatfix products and their new features, and actively take refresher product training courses to stay updated.</li> </ul>



## R2

### UX Research Specialist

<b>Role Summary</b>		Resolve research problems in product capabilities, specialist in specific solution areas of a portfolio
<b>KRA</b>	<b>Sub-Category</b>	<b>Activities</b>
<b>Core Research</b>	<b>Project management &amp; Participant Recruitment</b>	<ul style="list-style-type: none"> <li>Review research requests via data collation tool for project planning.</li> <li>Develop Research Protocol document outlining research goals, expected outcomes, questions, and interview scripts with stakeholders.</li> <li>Collaborate with Lead to identify research needs and project opportunities.</li> <li>Address bandwidth challenges, collaborating on solutions with the manager.</li> <li>Define project goals, outcomes, and research questions with stakeholders.</li> <li>Set up projects, create detailed Research Protocol documents using tools like User Interviews, recruit participants, and initiate contact.</li> <li>Fulfill ad hoc research support requests for designers and team members.</li> <li>Manage multiple projects, prioritizing tasks based on strategic importance and timelines.</li> </ul> <p><b>Participant recruitment activities:</b></p> <ul style="list-style-type: none"> <li>Utilize various methods, including internal databases, Google Forms, and User Interviews, to recruit participants.</li> <li>Utilize tools/techniques like User Interviews to recruit external participants, ensuring representation from different demographics and regions.</li> </ul>
	<b>Research Interviews &amp; Data Analysis</b>	<p><b>In addition to R1's responsibilities -</b></p> <ul style="list-style-type: none"> <li>Analyze data collected from the research sessions, Identify insights, themes, and patterns to inform decision-making.</li> <li>Use tools like User Interviews and Maze for digital prototype testing.</li> <li>Convert research data into insights for the team lead(s)' strategic decision making.</li> </ul>
<b>Communication &amp; Collaboration</b>	<b>Research output alignment</b>	<ul style="list-style-type: none"> <li>Regularly update stakeholders, including PMs, Research Lead(s), Design Lead(s), and Engineers, on the progress of ongoing projects, low-level strategy &amp; potential roadblocks.</li> <li>Collaborate with stakeholders for Knowledge Transfer (KT) sessions to share strategic insights and project backgrounds.</li> <li>Address any conflicts or delays in collaboration with stakeholders to ensure timely project delivery.</li> <li>Collaborate with designers and product managers in prototype testing.</li> <li>Participate in workshops with other research/design team members to come up with solutions to different problem statements.</li> <li>Share the identified research alternatives and recommendations for review with team leadership.</li> </ul>

		<ul style="list-style-type: none"> <li>● Share research work for peer input and feedback.</li> </ul>
	<b>Cross-Functional and external collaboration</b>	<ul style="list-style-type: none"> <li>● Interact with external entities such as competitor product users to gather comparative insights and perspectives.</li> <li>● Engage with clients, CSMs, &amp; external product users, for specific research studies.</li> <li>● Share progress on key metrics, pod reviews for the quarter, and share research updates to cross-functional teams.</li> <li>● Collaborate with CSMs to coordinate customer/internal research participant recruitment.</li> </ul>
<b>Enablement</b>	<b>Self-learning/Interventions</b>	<ul style="list-style-type: none"> <li>● Participate in team-level functional interventions or projects as required.</li> <li>● Actively learn principles and study additional methods of UX research.</li> <li>● Update knowledge of tools for optimizing one's research process.</li> <li>● Stay updated with all Whatfix products and features along with its technicalities.</li> <li>● Join workshops / UX research office hours to gather ideas &amp; feedback from all pods, and discuss if the right problems are being solved across the board</li> </ul>
	<b>Team/Cross-functional learning</b>	<ul style="list-style-type: none"> <li>● Actively contribute to the development of the UX research team through knowledge-sharing sessions.</li> <li>● Provide input to enhance the team's bandwidth and streamline processes for more efficient project management.</li> <li>● Participate in enablement sessions to empower designers to conduct research independently.</li> <li>● Troubleshoot tool-related/research issues for the team, and provide guidance as needed.</li> <li>● Regularly update Confluence repositories with methodologies, examples, templates, and guides for the team's reference.</li> <li>● Keep track of tools used, troubleshoot issues, and create guides on tool usage for the team.</li> <li>● Provide tools and knowledge for all WFX employees interested in research, including PMs, sales, and CS, ensuring they can create actionable insights from data.</li> </ul>

## R2 Competencies

Competency	Behavioral Indicators
<b>Communication</b>	<p>Process alignment and project collaboration</p> <ul style="list-style-type: none"> <li>● I consistently review research requests using designated data collation tools, demonstrating attentiveness to detail in project planning.</li> <li>● I develop clear and structured Research Protocol documents that effectively outline research goals, outcomes, and interview scripts in collaboration with stakeholders.</li> <li>● I communicate effectively with the Lead to identify research needs and opportunities, ensuring alignment with project objectives.</li> <li>● I collaborate with team members to address project challenges, actively contributing to finding and implementing solutions.</li> <li>● I regularly update stakeholders on project progress and potential roadblocks, demonstrating transparent and proactive communication through documentation.</li> </ul> <p>Democratization of research outputs through verbal/presentation mediums</p> <ul style="list-style-type: none"> <li>● I present research findings clearly and concisely in team meetings, ensuring all stakeholders understand key insights and implications for decision-making.</li> <li>● I prepare and deliver presentations summarizing research outcomes to stakeholders, using visual aids to enhance understanding.</li> <li>● I participate actively in workshops and knowledge-sharing sessions, sharing research findings and contributing ideas to problem-solving discussions.</li> <li>● I engage with cross-functional teams, effectively communicating research updates and gathering feedback.</li> <li>● I update repositories/create presentations with well-organized and accessible research documentation, making it easy for team members to reference and utilize research outputs.</li> </ul>
<b>Learning Agility</b>	<ul style="list-style-type: none"> <li>● I actively seek feedback from colleagues and stakeholders to improve research processes and methodologies.</li> <li>● I demonstrate openness to learning new research tools and techniques to enhance efficiency and effectiveness.</li> <li>● I seek opportunities to participate in workshops and knowledge-sharing sessions to expand knowledge and skills in UX research.</li> <li>● I adapt quickly to changing project priorities and requirements, demonstrating flexibility in managing multiple projects.</li> <li>● I take initiative to troubleshoot and resolve tool-related or research issues, showing willingness to learn and problem-solve independently.</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>● I consistently prioritize tasks based on project importance and timelines, ensuring timely completion of research activities.</li> <li>● I proactively identify and address any challenges or conflicts that may arise during project collaboration, maintaining focus on achieving desired outcomes.</li> <li>● I regularly update stakeholders on project progress, metrics, and potential roadblocks, demonstrating accountability for results.</li> <li>● I actively seek feedback from peers and stakeholders to improve research processes and</li> </ul>

	<p>methodologies, showing a commitment to achieving better outcomes.</p> <ul style="list-style-type: none"> <li>● I adapt quickly to changing project priorities and requirements, demonstrating resilience and determination in achieving results.</li> </ul>
<b>Research Acumen</b>	<ul style="list-style-type: none"> <li>● I thoroughly analyze research requests to understand project objectives and requirements for effective project planning.</li> <li>● I reach out when there is any clarity required in research goals and outcomes with stakeholder expectations.</li> <li>● I employ various methods for participant recruitment, ensuring diverse representation and comprehensive data collection.</li> <li>● I actively seek to learn and apply new research methodologies and tools to optimize research processes and outcomes.</li> </ul>
<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>● I strive to develop an understanding of the industry landscape, business proposition and the overall customer scope of Whatfix.</li> <li>● I deep dive to understand customer goals, short/long-term roadmap and how Whatfix can meet their requirements and create value.</li> <li>● I am keen to know more about Whatfix products and their new features, and actively take refresher product training courses to stay updated.</li> </ul>

### R3

### UX Research Specialist, Scope/Domain

<b>Role Summary</b>		Lead the solution of multiple product areas in a portfolio as a specialist, connecting it to broader product vision or size of projects.
<b>KRA</b>	<b>Sub-Category</b>	<b>Activities</b>
<b>Core Research</b>	<b>Project management &amp; Participant Recruitment</b>	<p><b>In addition to R2's responsibilities -</b></p> <ul style="list-style-type: none"> <li>● Contribute to projects with broader product vision of WFX, including product evolution and lab projects and contribute as a strategic partner.</li> <li>● Plan and execute comprehensive research using diverse methodologies, including focus groups, user interviews, and quantitative studies.</li> <li>● Collaborate closely with project teams, including engineers, to test new flows, conduct concept testing, and address accessibility roles in product development.</li> <li>● Define target audiences for research projects, distinguishing between customers, end-users, and competitors.</li> <li>● Conducts research that supports PD in creating novel or innovative solutions to very complex or important interaction problems to break through stand-stills or gridlock.</li> <li>● Helps Product Design and Product Mgmt counterparts distinguish higher-level</li> </ul>



		<p>user priorities and high-value differentiators from seemingly equal competing priorities to provide insights and practical recommendations that are highly desirable for our customers.</p> <ul style="list-style-type: none"> <li>● Ensure assigned tasks are progressing well, setup weekly sessions to evaluate how things are shaping up, present at office hours to gather feedback and take up questions.</li> <li>● Ensure aligned team members have role &amp; project clarity, conduct regular check-ins.</li> </ul> <p><b>Participant recruitment activities: Same as R2</b></p>
	<p><b>Research Interviews &amp; Data Evangelization</b></p>	<p><b>In addition to R2's responsibilities -</b></p> <ul style="list-style-type: none"> <li>● Create detailed research plans, including methodologies, tasks, scripts, and post-test surveys with usability and product friendliness metrics.</li> <li>● Send instructions and NDAs to participants, moderate sessions, gather data, and analyze insights using tools such as Condense and Chorus.</li> <li>● Create affinity diagrams that translate research data into actionable insights for leadership, including key stakeholders.</li> <li>● Provide directions, recommendations, and next steps to guide ideation in product design based on research findings.</li> <li>● Develop research reports with a storytelling approach, incorporating videos and communicate these insights across the company in ways that are easy for different stakeholders to understand.</li> <li>● Create user personas, user journeys, and research decks for different teams within WFX, addressing their specific targets and opportunities.</li> </ul>
<p><b>Communication &amp; Collaboration</b></p>	<p><b>Democratizing research outputs</b></p>	<p><b>In addition to R2's responsibilities -</b></p> <ul style="list-style-type: none"> <li>● Guide designers conduct research through surveys, dividing requests, and providing support throughout the entire study, including recruiting participants, conducting studies, and sharing feedback.</li> <li>● Ensure designers understand research methodologies and create actionable insights.</li> <li>● Involve in documentation updates, track customer invites and generate reports for BU Head.</li> <li>● Join leadership sync meetings on how things have progressed, and what challenges the team has undergone</li> <li>● Speaks confidently about the User's mental models, experiences, and needs; and influences POD / Portfolio-related conversations and decision-making.</li> </ul>
	<p><b>Cross-Functional and external collaboration</b></p>	<p><b>In addition to R2's responsibilities -</b></p> <ul style="list-style-type: none"> <li>● Visit customers at their offices, observe their interactions, ask questions, and share insights back with WFX, identifying opportunities for improvement and successful engagements.</li> <li>● Collaborate with customer-facing business units on a strategy to recruit customers, address apprehensions, and provide guidelines for designer engagement.</li> </ul>

		<ul style="list-style-type: none"> <li>Communicate research findings strategically, serve as the voice of users and utilize knowledge of the user based on research insights during Whatfix product meetings with R&amp;D stakeholders.</li> </ul>
Enablement	Self-learning/Interventions	Same as R2
	Team/Cross-functional learning	<b>In addition to R2's responsibilities -</b> <ul style="list-style-type: none"> <li>Monitor and ensure quality assurance for designers, ensuring insights and communication to their respective pods are comprehensive.</li> <li>Takes ownership of enablement sessions from planning to execution.</li> <li>Plan activities and workshops for democratizing research, including advanced modules and different training sessions.</li> </ul>

### R3 Competencies

Competency	Behavioral Indicators
Communication	<p>Process alignment and collaboration</p> <ul style="list-style-type: none"> <li>I develop comprehensive research plans with clear methodologies, tasks, and metrics, ensuring alignment with project goals and usability standards.</li> <li>I facilitate research sessions, moderating discussions, and analyzing data to derive actionable insights using tools such as Condense and Chorus.</li> <li>I create compelling research reports with storytelling approaches, incorporating multimedia elements to communicate insights effectively across stakeholders.</li> <li>I collaborate with designers, guiding them through research processes, ensuring they understand methodologies, and translating findings into actionable design recommendations.</li> <li>I actively engage in cross-functional collaboration, visiting customers, observing interactions, and sharing insights to drive product improvements and successful engagements.</li> </ul> <p>Democratization of research outputs through verbal/presentation mediums</p> <ul style="list-style-type: none"> <li>I develop affinity diagrams that effectively translate research data into actionable insights for leadership and key stakeholders.</li> <li>I lead the creation of user personas, user journeys, and research decks tailored to different teams within the organization, addressing their specific targets and opportunities.</li> <li>I strategically communicate research findings, serving as the voice of users and influencing product discussions and decision-making during meetings with R&amp;D stakeholders.</li> </ul>
Learning Agility	<ul style="list-style-type: none"> <li>I actively seek out opportunities to contribute to projects with a broader product vision, demonstrating adaptability and willingness to engage in diverse initiatives.</li> <li>I guide designers in conducting research through surveys, providing support throughout the study, including participant recruitment and feedback sharing.</li> <li>I demonstrate agility in synthesizing complex research data into actionable insights, utilizing</li> </ul>

	<p>tools such as affinity diagrams to effectively communicate findings to leadership and key stakeholders.</p> <ul style="list-style-type: none"> <li>● I proactively engage in self-directed learning, staying updated on industry trends and emerging research methodologies, reflecting a commitment to continuous improvement and professional growth.</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>● I take ownership of my responsibilities and initiatives, proactively setting up weekly sessions to assess progress, gather feedback, and address any questions or concerns from stakeholders, demonstrating initiative and accountability.</li> <li>● I demonstrate adaptability and resilience in navigating complex or challenging situations, leveraging creative problem-solving skills to overcome obstacles and keep projects on track.</li> <li>● I effectively communicate project updates and insights to relevant stakeholders, ensuring alignment and understanding across teams, and actively seek feedback to continuously improve outcomes and drive success.</li> </ul>
<b>Research Acumen</b>	<ul style="list-style-type: none"> <li>● I demonstrate proficiency in designing comprehensive research plans, including clear methodologies, tasks, scripts, and post-test surveys, ensuring that research activities are well-defined and aligned with project objectives.</li> <li>● I regularly collaborate with cross-functional project teams, including engineers, to test new product features and address accessibility considerations, showcasing versatility in working across different domains.</li> <li>● I exhibit strong analytical skills, effectively gathering and analyzing research data using various tools such as Condense and Chorus, and translating insights into actionable recommendations for product development.</li> </ul>
<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>● I demonstrate the ability to provide directions, recommendations, and next steps to guide ideation in product design based on research findings, leveraging insights to inform decision-making processes that drive innovation and competitiveness.</li> <li>● I engage in collaborating with customer-facing business units to develop strategies for customer recruitment and engagement, thereby enhancing the organization's understanding of market needs and preferences.</li> </ul>

## R4

### Product Design Specialist, Scope/Domain

<b>Role Summary</b>	Lead the solution of undefined problem spaces, devise plans with critical problem solving skills on all product research solution areas and portfolios.
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KRA	Sub-Category	Activities
Core Research	Project management	<p><b>In addition to R3 responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Lead one's own/junior projects and position Research (help others see UXR(s) efforts) as strategic partners in research and lab projects, envisioning the future product landscape and actively delivering and buddying junior researchers in lab projects.</li> <li>• Conducts research that supports PD in creating novel or innovative solutions to very complex or important interaction problems to break through stand-stills or gridlock.</li> <li>• Plan and execute comprehensive research using diverse methodologies, including focus groups, user interviews, and quantitative studies.</li> <li>• Collaborate closely with project teams, including engineers, to test new flows, conduct concept testing, and address accessibility roles in product development.</li> <li>• Define target audiences for research projects, distinguishing between customers, end-users, and competitors.</li> <li>• Helps PD and PM counterparts distinguish higher-level user priorities and high-value differentiators from seemingly equal competing priorities to provide insights and practical recommendations that are highly desirable for our customers.</li> <li>• Develop research that simultaneously addresses problems statements and aligns with the user experience vision and direction.</li> <li>• Suggest any sort of tool resource allocation and bring it up to leadership for right support and decision.</li> </ul>
	Research Interviews & Data Evangelization	<p><b>In addition to R3 responsibilities -</b></p> <ul style="list-style-type: none"> <li>• Consistently utilizes data analytics and qualitative data to inform iterative user data analytics tracking to better understand positive and negative product experiences.</li> </ul>
Communication & Collaboration	Democratizing research outputs	<p><b>In addition to R3 responsibilities -</b></p> <ul style="list-style-type: none"> <li>• Help PM and PD make sense of past and ongoing insights relevant to their pod/portfolio(s) so that the team can make informed product and/or roadmap decisions.</li> </ul>
	Cross-Functional research evangelization	<p><b>In addition to R3 responsibilities -</b></p> <ul style="list-style-type: none"> <li>• Can articulate and evangelize the intersection and value of multiple product areas within multiple portfolios for customers based on research insights.</li> <li>• Defines and communicates multi-phased research plans tailored to a project, orchestrates work with 1 to 2 other designers or researchers, and executes on research for large scale redesigns with Product Design direction.</li> <li>• Organizes and sequences activities around a product design including orchestration of others' work: prioritization and planning, external/stakeholder alignment, prototype design, data analysis, scoping, etc.</li> <li>• Balances multiple projects, sets/resets/manages expectations and commitments in a timely manner.</li> <li>• Turns disparate data into concise insights /models that others can understand and use.</li> </ul>



		<ul style="list-style-type: none"> <li>Initiates and moderates cross-team workshops.</li> </ul>
Enablement	Self-learning/Interventions	<b>In addition to R3 responsibilities -</b> <ul style="list-style-type: none"> <li>Share expertise and new learning (e.g. collaboration experiences, best practices, methods, etc) outside of Whatfix through conferences, written articles, or other presentations</li> </ul>
	Team/Cross-functional learning	<b>In addition to R3 responsibilities -</b> <ul style="list-style-type: none"> <li>Plan activities and workshops for sharing and enabling project team members with new methods or approaches (e.g. approaching innovation, service design / system methods, measuring success etc) to tackling relevant problems.</li> </ul>

### R4 Competencies

Competency	Behavioural Indicators
Communication	Democratization of research outputs through verbal/presentation mediums <ul style="list-style-type: none"> <li>I consistently utilize data analytics and qualitative data to inform iterative user data analytics tracking, providing comprehensive insights into both positive and negative product experiences.</li> <li>I help product managers (PM) and product designers (PD) make sense of past and ongoing insights relevant to their portfolios, enabling informed product and roadmap decisions based on research findings.</li> <li>I articulate and evangelize the intersection and value of multiple product areas within various portfolios for customers based on research insights, effectively communicating the strategic importance of research initiatives to stakeholders and decision-makers.</li> </ul>
Learning Agility - Teaching team members	<ul style="list-style-type: none"> <li>I share my learning experiences outside of Whatfix through conferences, written articles, or presentations, contributing to the broader research community.</li> <li>I position research efforts as strategic partners in research and lab projects, and actively mentor junior researchers, fostering their growth and development within the team.</li> <li>I organize and sequence workshops around product research/design, including prioritization, planning, external/stakeholder alignment, prototype design, data analysis, and scoping- teaching team members in new ways of doing things aligning towards project goals.</li> </ul>
Drive for Results	<ul style="list-style-type: none"> <li>I conduct research that supports Product Development in creating novel or innovative solutions to complex interaction problems, by providing actionable insights and recommendations.</li> <li>I define and execute comprehensive research plans addressing compliance/innovation concepts and align research efforts with the user experience vision and direction, ultimately contributing to the achievement of product goals and objectives.</li> </ul>

<b>Research Acumen</b>	<ul style="list-style-type: none"> <li>● I show strategic thinking in defining target audiences for research projects, distinguishing between different user groups such as customers, end-users, and competitors, to ensure research efforts are focused and relevant.</li> <li>● I demonstrate proficiency in designing comprehensive research plans, including clear methodologies, tasks, scripts, and post-test surveys, ensuring that research activities are well-defined and aligned with product vision.</li> <li>● I consistently utilize data analytics and qualitative data to inform iterative user data analytics tracking, allowing for a better understanding of positive and negative product experiences.</li> </ul>
<b>Business Acumen</b>	<p><b>In addition to R3's behavioral indicators -</b></p> <ul style="list-style-type: none"> <li>● I play a proactive role in resource allocation, suggesting tools and technologies to support research efforts and bringing them to the attention of leadership for appropriate support and decision-making.</li> </ul>

**R5X**

**Principal UX Researcher, Product/Domain**

<b>Role Summary</b>	Design and create rationale for major foundational and architectural research solutions across multiple cross-sub functional tribes within a project.
<b>KRA</b>	<b>Activities</b>
<b>Research Project Strategy &amp; Thought Leadership</b>	<ul style="list-style-type: none"> <li>● Lead and contribute to the development of overarching research strategies aligned with organizational goals.</li> <li>● Represent and identify highly complex customer problems across the product and lead the design lifecycle from discovery through design validation and customer adoption</li> <li>● Manage large research project initiatives in collaboration with other researchers and designers.</li> <li>● Provide expert guidance on selecting appropriate research methodologies and approaches for complex projects utilizing both quant and qual methods.</li> <li>● Collaborate with cross-functional teams, product managers, and designers to integrate research into product development cycles effectively.</li> <li>● Engage with customers to understand their unique needs for our products, defining and synthesizing user types and use cases</li> </ul>

<b>Research execution and data architecture</b>	<ul style="list-style-type: none"> <li>● Ensure the quality and rigor of research activities, implementing best practices and staying abreast of industry advancements and sharing those with the UX Research, product design and others in the org.</li> <li>● Apply, adapt and mentor junior team members in appropriate research techniques and methods for specific project needs</li> <li>● Validate feature and design direction through participatory design, early concept testing, formative and summative usability testing</li> <li>● Provide direction, vision and leadership for large collaborative efforts</li> <li>● Build strategic persona data architecture or research architecture/research solution swimlanes for different products based on type of project areas handled by the team</li> </ul>
<b>Strategic communication &amp; research function evangelization</b>	<ul style="list-style-type: none"> <li>● Contribute to the creation of compelling narratives that highlight the user experience impact on R&amp;D and business objectives.</li> <li>● Stay at the forefront of UX research methodologies, tools, and trends, providing thought leadership within and outside of the organization.</li> <li>● Act as a key liaison between UX research and other business and R&amp;D teams, fostering a culture of cross-functional collaboration and shared understanding.</li> <li>● Partner with Product Managers and Designers to provide highly informed strategic recommendations that influence decision making.</li> <li>● Communicate and educate partners on findings through artifacts such as specific user segments, persona frameworks, jobs to be done, user journeys, task analyses, etc</li> </ul>
<b>Team development</b>	<ul style="list-style-type: none"> <li>● Mentor and coach junior researchers, fostering a culture of continuous learning and skill development.</li> <li>● Provide mentorship to other members of the larger team and champion the discipline across the organization.</li> <li>● Lead initiatives to enhance the overall research capabilities and methodologies within the team.</li> </ul>

R5X Competencies

Competency	Behavioral Indicators
<b>Strategic Communication</b>	<ul style="list-style-type: none"> <li>● I ensure that research insights are effectively integrated into product development cycles and aligned with organizational goals by articulating the rationale behind recommendations, driving consensus and alignment among stakeholders.</li> <li>● I effectively communicate research findings to partners and stakeholders through artifacts such as specific user segments, persona frameworks, jobs to be done, user journeys, and task analyses.</li> <li>● I excel in representing, identifying highly complex customer problems and driving solution-oriented conversations across products, through research architectures, design validation and customer adoption strategy expertise.</li> </ul>



<b>Learning Agility - Coaching Others</b>	<ul style="list-style-type: none"> <li>● I am the functional mentor and guide for all team members working in my area of specialization/focus</li> <li>● I share my knowledge and perspectives with the leadership to influence the business roadmap interfacing with my area of specialization/focus</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>● I set realistic targets for my projects, and support other team members in achieving results.</li> <li>● For my cross-functional projects, I monitor the progress and performance of members from Design &amp; other teams, nudging them back on track upon deviation.</li> <li>● I share my knowledge &amp; expertise with the team to help generate breakthrough ideas, fresh perspectives and new approaches to meet customer needs.</li> <li>● I am skilled at product management, and can manage the product(s) in absence of a product manager.</li> </ul>
<b>Research Acumen</b>	<ul style="list-style-type: none"> <li>● I help leadership in the development of overarching research strategies that are closely aligned with organizational goals,</li> <li>● I demonstrate a deep understanding of functional knowledge, business objectives &amp; customer needs, effectively guiding research efforts across multiple projects &amp; product areas.</li> <li>● I consistently work towards increasing the depth &amp; breadth of knowledge - diving deeper in my expertise in my area of specialization/focus, and increasing understanding &amp; hands-on ability in domains that are business critical / adjacent to my focus areas.</li> <li>● I can operate autonomously on complex problems in my areas of specialization/focus.</li> </ul>
<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>● I act as subject matter expert for my focus areas to guide &amp; expedite decision making &amp; implementation of action plans</li> <li>● I monitor, evaluate and, if needed, provide input to change the design/cross-functional team's approach as and when needed.</li> </ul>

## R5L

### UX Research Lead, Scope/Domain

<b>Role Summary</b>	An organized leader and performer who pushes for high performance and drives change. Co-create with the team - Drive skill building, Align team to overall vision & objectives, Draw actionable plans & Leads junior iCs and shares feedback for the team to work upon
<b>KRA</b>	<b>Activities</b>
<b>Drive Research Strategy</b>	<ul style="list-style-type: none"> <li>● Regularly sync with leaders in UX, Engineering, and Product to understand strategy, discover blockers, manage quality, and help ensure UX Research prioritization.</li> <li>● Review POD-level release plan and quarterly roadmap.</li> <li>● Build frameworks in consultation with cross-functional pod leads to address gap areas and</li> </ul>

	<p>blind spots.</p> <ul style="list-style-type: none"> <li>● Drive pointed focus on Design / Research OKRs and key metrics, and ensure team's quarterly goals are aligned to the same, to execute the Design strategy.</li> <li>● Ensure experience strategy is rolled out and understood by to your teams and pods.</li> <li>● Meet with customers and users to understand their needs and offer solutions that align across our products.</li> <li>● Responsible for the vision of their team and its alignment to the experience vision and strategy.</li> <li>● Present roadmap and updates at Design Leadership and other Stakeholder meetings.</li> <li>● Conduct regular 1:1s with cross-functional leaders.</li> </ul>
<p><b>Enhance Team Quality &amp; Effectiveness</b></p>	<ul style="list-style-type: none"> <li>● Manage all employee and organizational processes, and ensure compliance for the entire team.</li> <li>● Actively seek out difficult impediments to our efficiency as a team (process, tooling, etc), and propose and implement solutions that will enable the entire team to work more efficiently.</li> <li>● Actively contribute to the UX Research team culture, processes, and documentation-processes, outcomes and best practices.</li> <li>● Help your team set clear goals and priorities and provide the necessary resources and tools to achieve them.</li> <li>● Manage and optimize the allocation of research resources, balancing project demands and team member strengths.</li> <li>● Collaborate with cross-functional teams to understand project requirements and secure necessary resources for successful execution.</li> <li>● Identify opportunities for process improvements and resource optimization within the UX Research department.</li> <li>● Drive retrospective reviews of the past quarter to capture the team's feedback on the pods' outcomes and leadership - and make the necessary changes in the future course of action.</li> <li>● Define research success metrics and get the teams to achieve set targets.</li> </ul>
<p><b>Strategic Communication</b></p>	<ul style="list-style-type: none"> <li>● Communicate, advocate for, and socialize actionable insights in a clear and compelling way.</li> <li>● Help drive change based on research insights and best practices</li> <li>● Keep track of insights and customer-based “best practices” derived from user research and share across relevant business units</li> </ul>
<p><b>Team Management</b></p>	<ul style="list-style-type: none"> <li>● Leverage formal and informal connects to be aware of the team's pulse and overall well-being; make concessions for tough situations and provide extra support for growth wherever required.</li> <li>● Drive all important employee conversations - feedback, check-in, 1:1, quarterly reviews, career conversations, performance conversations, etc.</li> <li>● Help your team set clear goals and provide the necessary resources and tools to achieve them.</li> <li>● Create an environment of continuous learning. Coach team members on their personal development (presentation/communication, time management/prioritization, functional, and technical).</li> <li>● Calibrate the team each quarter and maintain a high-performing team. Hire the best quality people, integrate employees, and match team members to opportunities that use and extend their skills in their daily work.</li> </ul>

<b>Hands-On Managerial Expectations</b>	<p><b>Customer-Focused:</b></p> <ul style="list-style-type: none"> <li>● Facilitate workshops as required (minimum once a year)</li> <li>● Conduct research/customer interviews</li> </ul> <p><b>Research-Focused:</b></p> <ul style="list-style-type: none"> <li>● Design &amp; research plan together to disambiguate research problems - in the absence of an IC</li> <li>● Synthesize qualitative feedback and quantitative data (and evangelize research insights) - gather data (quant &amp; qual) and present it to build evidence for larger initiatives</li> <li>● Address domain-related queries based of research insights</li> <li>● Conduct user research</li> <li>● Create personas</li> </ul> <p><b>Planning-Focused:</b></p> <ul style="list-style-type: none"> <li>● Participate in team feedback sessions</li> <li>● Facilitate brainstorming sessions</li> <li>● Stay updated and evangelize the latest tools &amp; research trends</li> <li>● Collaborate with the team on research work</li> <li>● Work on a product component research</li> </ul>
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## R5L Competencies

Competency	Behavioral Indicators
<b>Strategic Communication</b>	<ul style="list-style-type: none"> <li>● I ensure that research insights are effectively integrated into product development cycles and aligned with organizational goals by articulating the rationale behind recommendations, driving consensus and alignment among stakeholders.</li> <li>● I effectively communicate research findings to partners and stakeholders through artifacts such as specific user segments, persona frameworks, jobs to be done, user journeys, and task analyses.</li> <li>● I excel in representing, identifying highly complex customer problems and driving solution-oriented conversations across products, through research architectures, design validation and customer adoption strategy expertise.</li> </ul>
<b>Learning Agility - Coaching Others</b>	<ul style="list-style-type: none"> <li>● I am the functional mentor and guide for all team members working in my area of specialization/focus</li> <li>● I share my knowledge and perspectives with the leadership to influence the business roadmap interfacing with my area of specialization/focus</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>● I set realistic targets for my projects, and support other team members in achieving results.</li> <li>● For my cross-functional projects, I monitor the progress and performance of members from Design &amp; other teams, nudging them back on track upon deviation.</li> <li>● I share my knowledge &amp; expertise with the team to help generate breakthrough ideas, fresh perspectives and new approaches to meet customer needs.</li> <li>● I am skilled at product management, and can manage the product(s) in absence of a</li> </ul>

	product manager.
<b>Research Acumen</b>	<ul style="list-style-type: none"> <li>● I help leadership in the development of overarching research strategies that are closely aligned with organizational goals,</li> <li>● I demonstrate a deep understanding of functional knowledge, business objectives &amp; customer needs, effectively guiding research efforts across multiple projects &amp; product areas.</li> <li>● I consistently work towards increasing the depth &amp; breadth of knowledge - diving deeper in my expertise in my area of specialization/focus, and increasing understanding &amp; hands-on ability in domains that are business critical / adjacent to my focus areas.</li> <li>● I can operate autonomously on complex problems in my areas of specialization/focus.</li> </ul>
<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>● I act as subject matter expert for my focus areas to guide &amp; expedite decision making &amp; implementation of action plans</li> <li>● I monitor, evaluate and, if needed, provide input to change the design/cross-functional team's approach as and when needed.</li> </ul>

## R6L

### UX Research Lead, Scope/Domain

<b>Role Summary</b>	An effective leader focused on building teams and methods for high-impact results. Apply learnings & expertise across multiple projects & teams with higher timelines/impact. Reframe the vision for their areas of focus. Manage a more experienced team of ICs and principals.
<b>KRA</b>	<b>Activities</b>
<b>Drive Research Strategy</b>	<p><b>In addition to R5L responsibilities -</b></p> <ul style="list-style-type: none"> <li>● Work closely with Head(s) of Research to align research initiatives with overall business goals and product strategies.</li> <li>● Be able to tell a collective story of the user experience across products and socialize UX Research team findings with stakeholders globally for collaborating on strategy, roadmap and other initiative development.</li> <li>● Contribute to high impact projects that require senior management insight and attention; and formulate a plan for how research team/resources can contribute to those projects</li> <li>● Align the Product Managers &amp; the Engg teams on the key priorities for the quarter, and the overall vision &amp; roadmap.</li> <li>● Collaborate with Design Leads in identifying the features to be prioritized in a particular quarter, whenever required, and drive corresponding research project priorities across all R&amp;D teams.</li> <li>● Drive continuous inter-team connect &amp; communication to create awareness of design deliverables &amp; interventions, act on stakeholder feedback and ensure positive reception of design outcomes.</li> <li>● Ensure your teams are in sync with the research strategy and plan their focus accordingly.</li> </ul>

	<ul style="list-style-type: none"> <li>● Stay updated on market trends and new innovations to leverage them in the course of work wherever possible.</li> <li>● Participate in group-level customer-facing workshops, observations, and discovery sessions.</li> <li>● Participate in an experience roadmap on select customer calls.</li> <li>● Set and communicate your teams' integrated product vision and direction based on the product and experience vision, strategy, and goals that span multiple product areas and/or personas.</li> <li>● Create and present a 6- to 12-month research strategy aligning with design's experience strategy.</li> <li>● Contribute to department and Tribe-level OKRs.</li> <li>● Drive at least one cross-product/horizontal initiative.</li> </ul>
<p><b>Enhance Team Quality &amp; Effectiveness</b></p>	<p><b>In addition to R5L responsibilities -</b></p> <ul style="list-style-type: none"> <li>● Prioritize and allocate research resources based on project requirements, timelines, and strategic impact.</li> <li>● Drive multiple connects and interventions to ensure the team deliverables meet the set quality benchmarks.</li> <li>● Track and ensure compliance with all data and documentation metrics and hygiene practices.</li> <li>● Conduct in-depth quality reviews of the team's submissions to improve the output levels of the team that goes into the final release.</li> <li>● Coach the team on personal development, functional skills, and technical skills (how to present, create a document, facilitate customer/internal workshops, etc.).</li> <li>● Drive research-led presentations and meetings with stakeholders, set framing and context, and field high-level questions that are not in the scope of the call.</li> <li>● Guide the team to improve their research skills and output, and increase the scope of customers being reached out to.</li> </ul>
<p><b>Strategic Communication</b></p>	<p><b>In addition to R5L responsibilities:</b></p> <ul style="list-style-type: none"> <li>● Help drive cross-POD research by having an awareness of what's happening across all sections through active participation in POD Reviews, Product Design Office Hours, XRBs, and other group (including Slack) conversations.</li> <li>● Drive design-led presentations and meetings with stakeholders, set framing and context, and fielding higher-level questions that are not the scope of the call.</li> <li>● Develop and maintain strong relationships with key stakeholders to stay informed about business priorities and contribute to strategic decision-making on high impact initiatives.</li> </ul>
<p><b>Team Management</b></p>	<ul style="list-style-type: none"> <li>● Coach senior level UX Researchers (ICs), conduct 1:1s, growth, and have feedback conversations</li> <li>● Conduct in-depth review of team's deliverable to improve insights are practical and can be easily utilized by stakeholder teams.</li> <li>● Coach direct reports on personal development, functional skills, and technical skills (how to present, create a document, facilitate customer/internal workshops, etc.)</li> <li>● Guide the team to improve their research skills and output, and increase scope of customers being reached out to.</li> <li>● Ensure appropriate work allocation based on aptitude and attitude.</li> <li>● Identifies and coach lead-level/aspiring leaders on their team. Create opportunities for them</li> </ul>



	<p>to use or stretch these skills.</p> <ul style="list-style-type: none"> <li>● Drive enablement interventions in the team - and focus on activities to translate those learnings to workplace</li> <li>● Participate in headcount and team planning</li> <li>● Stay informed of industry best practices, help the team to evolve our research practice accordingly.</li> </ul>
<b>Hands-On Managerial Expectations</b>	<p><b>Customer-Focused:</b></p> <ul style="list-style-type: none"> <li>● Have regular customer-facing interactions</li> <li>● Facilitate customer-facing workshops</li> <li>● Conduct customer interviews</li> <li>● Derive and share on-site customer observations</li> </ul> <p><b>Research-Focused:</b></p> <ul style="list-style-type: none"> <li>● Design &amp; research plan together to disambiguate design/research problems</li> <li>● Synthesize qualitative feedback and quantitative data (and evangelize research insights) - gather data (quant &amp; qual) and present it to build evidence for larger initiatives</li> <li>● Address domain-related queries based of research insights</li> <li>● Conduct user research</li> <li>● Create personas</li> </ul> <p><b>Planning-Focused:</b></p> <ul style="list-style-type: none"> <li>● Participate in product design/research feedback sessions</li> <li>● Present the design/research roadmap for the team</li> <li>● Facilitate brainstorming sessions</li> <li>● Collaborate with team on research work</li> <li>● Work on a product component research lifecycle</li> </ul>

### R6L Competencies

Competency	Behavioral Indicators
<b>Strategic Communication</b>	<ul style="list-style-type: none"> <li>● I lead research-led presentations and meetings with stakeholders, providing framing, context, and addressing higher-level inquiries beyond the immediate scope of discussion.</li> <li>● I cultivate and nurture strong relationships with key stakeholders, ensuring alignment with business priorities and actively contributing to strategic decision-making on high-impact initiatives.</li> <li>● I successfully de-escalate high-pressure situations with important stakeholders through careful, well-crafted verbal and written communication.</li> <li>● I role-model openness and transparency in sharing and receiving information to set the right expectations within the team.</li> </ul>
<b>Learning Agility - Coaching Others</b>	<ul style="list-style-type: none"> <li>● I mentor &amp; coach teams to widen their thought process and enable continuous growth &amp; development.</li> <li>● I build cooperation between departments and work groups.</li> <li>● I actively develop rapport with a variety of people and guide my team in building trust &amp;</li> </ul>

	<p>strengthening relationships.</p> <ul style="list-style-type: none"> <li>● I deal effectively with all races, nationalities, cultures, disabilities, ages, sexes, and life perspectives.</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>● I focus on encouraging more efficient processes thereby promoting faster goal closure.</li> <li>● I develop team capability by proactively identifying the skill gaps and role requirements.</li> <li>● I ensure adherence to all performance-driven processes and practices.</li> </ul>
<b>Research Acumen</b>	<ul style="list-style-type: none"> <li>● I collaborate closely with the Leadership to ensure that research initiatives are strategically aligned with the overarching business goals and product strategies.</li> <li>● I effectively communicate the collective story of user experience across products, sharing UX Research team findings with stakeholders globally to inform strategy, roadmap development, and other initiatives.</li> <li>● I lead the contribution of the research team/resources to high-impact projects requiring senior management insight, developing strategic plans to maximize research impact.</li> <li>● I identify the right opportunities, tools and avenues for my team to upskill functionally, and actively partner with them in the process.</li> <li>● I provide design mentorship by myself/through other leaders in the team to the team members to guide them towards their goals and objectives.</li> </ul>
<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>● I facilitate alignment between cross-functional teams on key priorities for the quarter, ensuring a shared understanding of the overall vision and roadmap.</li> <li>● I share trends and transformations in the design domain / product line / solution area with the leadership to influence changes in the overall approach and strategy.</li> <li>● I strategically align internal efforts (process, content, offerings, etc.) around the customer needs and Whatfix design objectives.</li> <li>● I bring the focus of the team towards top BU priorities and actively plan to work towards those.</li> </ul>

R7L

Head of UX Research, Product/Platform

<b>Role Summary</b>	Dynamic leader, focused on strategic vision, growing talent, and execution. Manage 2 or more teams and leads across focus areas.
<b>KRA</b>	<b>Activities</b>
<b>Strategic Team Management and Leadership</b>	<ul style="list-style-type: none"> <li>● Conduct regular one-on-one meetings with the larger larger team as well as regular dotted-line and skip-level 1:1s to discuss project progress, roadblocks, and problem-solving - Provide coaching and guidance to team members, especially in stakeholder management.</li> <li>● Act as the strategic lead for design/research in labs, overseeing all research projects and aligning them with a human-centered perspective.</li> <li>● Strategically plan the team's direction, considering product-market fit and aligning roadmaps with user-centered goals- contribute to strategic objectives/tribe level OKRs, developing and</li> </ul>



	<p>implementing policies, and help decision making on operational matters.</p> <ul style="list-style-type: none"> <li>● Navigate the challenges of managing a diverse and junior team- both experienced ICs and managers, adapting coaching styles to individual team members.</li> <li>● Embrace the unknown and uncertainties that come with managing both high-level strategic goals and day-to-day operations.</li> <li>● Define and track UX Research KPIs for multiple product areas</li> <li>● Lead accessibility, design thinking, and other innovation sessions involving other cross-functional leaders.</li> <li>● Review and weigh in on technical decisions that affect the user experience.</li> <li>● Review work to ensure quality standards were kept. Hold those accountable and document feedback when they are not.</li> <li>● Lead at least 1 large horizontal initiative or 2 medium</li> <li>● Translate product and experience vision into a clear and compelling experience strategy for your areas</li> </ul>
<p><b>Research &amp; Operations Strategy</b></p>	<ul style="list-style-type: none"> <li>● Engage in strategic conversations, align and create research strategies with the leadership to identify the organization's strategic research needs and initiate discussions on future potential research projects.</li> <li>● Interface with senior cross-functional leaders, ensure alignment with organizational objectives, evangelize feedback from customers-that addresses known problems and unmet needs and tweak research strategy.</li> <li>● Collaborate with the product managers, project managers and fellow research leads, evaluate scope/bandwidth and assign projects based on expertise/experience.</li> <li>● Develop a template Resource Protocol document for the team outlining the research goal, expected outcomes, research questions, and interview script in collaboration with stakeholders.</li> <li>● Ensure all tool utilization of the team is as per forecast and required standards.</li> <li>● Address ad hoc resource/expertise requests for team's research support, helping designers and other team members in overcoming roadblocks.</li> <li>● Oversee all tools used for research, ensuring access and the right information for the team.</li> <li>● Manage relationships with Customer Success Managers for research tools, addressing issues and exploring expanded functionality.</li> <li>● Handle logistics and operations related to research, including recruitment challenges and finding solutions.</li> <li>● Participate in budget discussions, presenting the team's needs and justifications for resource allocation.</li> <li>● Negotiate with vendors for tools and services, considering the impact on the team's efficiency and effectiveness.</li> <li>● Work with the recruiting team to explore options for team expansion, considering budget constraints - Attract high-potential candidates through reputation.</li> </ul>
<p><b>Strategic communication</b></p>	<ul style="list-style-type: none"> <li>● Interact and build relationships with customers through research initiatives/activities, including remote sessions and in-person observations - ensuring a strategic give-and-take dynamic.</li> <li>● Actively involve the team in customer interactions, fostering a customer-centric approach to research.</li> </ul>

	<ul style="list-style-type: none"> <li>● Facilitate knowledge sharing on strategic customer insights across the organization, ensuring research insights are disseminated effectively.</li> <li>● Communicate with stakeholders, including product managers and senior designers/team managers, providing feedback on managing customer relationships.</li> <li>● Create, maintain and evangelize customer insight documentation and resources for the function’s research enablement, such as the EPAR (Every Person a Researcher) initiative.</li> </ul>
<b>Team Development</b>	<ul style="list-style-type: none"> <li>● Promote continuous learning and company culture within the team, fostering an environment where team members are both teachers and learners.</li> <li>● Encourage team members to lead meetings and take ownership of projects, building their confidence and leadership skills.</li> <li>● Support team development through one-on-one meetings, feedback sessions, and strategic coaching.</li> <li>● Develop people manager direct reports into strong mentors and people managers, strategic leaders, and potential successors.</li> <li>● Empower people manager direct reports to handle challenging management situations and provide additional support.</li> <li>● 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.</li> <li>● Empower team members to lead discussions and set agendas in cross-functional meetings, reinforcing their role in the project.</li> <li>● Provide team members with the tools and training needed to effectively set agendas, lead discussions, and drive decision-making in collaborative settings.</li> <li>● Leverage a passion for education and teaching to guide and coach the team members in their professional development.</li> <li>● Establish initiatives to enhance team members' research skills and enablement.</li> <li>● Provide and receive constructive feedback effectively, while also recognizing strong performances &amp; small/big wins.</li> <li>● Proactively identify and address low employee performance with constructive feedback and documentation.</li> </ul>
<b>Hands-On Managerial Expectations</b>	<p><b>Customer-Focused:</b></p> <ul style="list-style-type: none"> <li>● Have regular customer-facing interactions</li> <li>● Facilitate customer-facing workshops</li> <li>● Conduct customer interviews</li> <li>● Derive and share on-site customer observations</li> </ul> <p><b>Research-Focused:</b></p> <ul style="list-style-type: none"> <li>● Design &amp; research plan together to disambiguate design/research problems</li> <li>● Synthesize qualitative feedback and quantitative data (and evangelize research insights) - gather data (quant &amp; qual) and present it to build evidence for larger initiatives</li> <li>● Address domain-related queries based of research insights</li> <li>● Conduct user research</li> <li>● Create personas</li> </ul>

	<p><b>Planning-Focused:</b></p> <ul style="list-style-type: none"> <li>● Participate in product design/research feedback sessions</li> <li>● Present the design/research roadmap for the team</li> <li>● Facilitate brainstorming sessions</li> <li>● Collaborate with team on research work</li> <li>● Work on a product component research lifecycle</li> </ul>
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## R7L Competencies

Competency	Behavioral Indicators
<b>Strategic Communication</b>	<ul style="list-style-type: none"> <li>● I facilitate strategic interactions with customers through various research activities, fostering a dynamic of strategic exchange.</li> <li>● I actively engage the team in promoting a customer-centric approach to research.</li> <li>● I lead efforts to disseminate strategic customer insights across the organization, facilitating knowledge sharing sessions and ensuring that research findings are communicated effectively to relevant stakeholders.</li> <li>● I successfully hold executive-level conversations to build trust and commitment.</li> <li>● I demonstrate a strong ability to challenge assumptions.</li> <li>● I can successfully probe to identify gaps missed by my teams to have an insightful discovery process.</li> </ul>
<b>Learning Agility - Coaching Others</b>	<ul style="list-style-type: none"> <li>● I accurately assess the potential barriers and resources for change initiatives and guide the team to success.</li> <li>● I envision and articulate the intended result of the change process in a manner the team understands.</li> <li>● I promptly switch strategies or tactics if the current ones are not working.</li> <li>● I provide mentoring / guidance and share relevant opportunities to build managerial capabilities within the Design team.</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>● I devise, facilitate buy-in, make recommendations, and guide implementation of corrective and/or preventive actions for complex issues that cross organizational boundaries and are unclear in nature.</li> <li>● I analyze multiple alternatives, risks, and benefits for a range of potential solutions.</li> </ul>
<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>● I ensure the products'/larger team's alignment with research principles and Whatfix design/research values.</li> <li>● I strategically consider product-market fit and align roadmaps with user-centered goals, contributing to strategic objectives and tribe-level OKRs.</li> <li>● I notice the underlying connections, opportunities and/or potential conflicts of my and team's actions on stakeholders within and external to the Design team and proceed accordingly.</li> <li>● I always consider the impact of my/team's action on the larger business/roadmap, and accordingly evaluate our plan of action and monitor it for inefficiencies and/or inappropriate use of resources.</li> <li>● I leverage my deep knowledge and understanding of the domain &amp; operating environment to identify partnerships and build relationships to support business objectives.</li> </ul>

# R8L

## Head of UX Research, Product/Platform

<b>Role Summary</b>	Storyteller, Team-builder, Driver of cross-product cross-functional strategy. Operate independently, influence the culture of the Design BU. Manage multiple global teams of multiple products/platforms
<b>KRA</b>	<b>Activities</b>
<b>Strategic Team Management and Leadership</b>	<ul style="list-style-type: none"> <li>● Develop and articulate a long-term vision for UX Research that aligns with company's strategic goals and market trends.</li> <li>● Research and synthesis industry reports to anticipate future challenges and opportunities in the field, shaping the direction of UX Research to maintain industry leadership.</li> <li>● Mentor and develop senior people managers and senior team members, focusing on leadership skills, strategic planning and execution</li> <li>● Engage with executives and key stakeholders to align UX Research initiatives with broader business strategies.</li> <li>● Influence organizational decision-making with insights derived from user experience research.</li> <li>● Champion the importance of user-centered design and research at the executive level, ensuring that it is a key consideration in all product and service decisions.</li> <li>● Drive initiatives that promote the integration of user research findings into all aspects of the business from product development to customer-facing teams.</li> <li>● Represent the company at industry events, conferences, and in publications, positioning the organization as a leader in user experience research.</li> <li>● Build and maintain relationships with key external partners, including research institutions and technology leaders, to stay ahead of trends and innovations in UX research.</li> <li>● Act as Lead for UX and Design in Labs and other Pods and SuperPods with heavy horizon- and research-intensive priorities.</li> </ul>
<b>Research &amp; Operations Strategy</b>	<ul style="list-style-type: none"> <li>● Lead the strategic planning process for the UX research function, ensuring integration with the company's overall strategy and product roadmap.</li> <li>● Lead strategic planning sessions with business unit heads and senior stakeholders to define overarching research objectives that align with the company's long-term goals.</li> <li>● Proactively identify emerging research needs and opportunities that can significantly impact the organization's strategic direction.</li> <li>● Ensure that all research initiatives are strategically aligned with the company's vision and market positioning, collaborating closely with senior leadership across departments.</li> <li>● Integrate user experience research more deeply into the company's strategic decision-making processes.</li> <li>● Implement advanced project management strategies and tools to enhance efficiency and effectiveness in research execution.</li> <li>● Provide strategic support to the research team and other departments, tackling complex challenges and facilitating the resolution of high-level roadblocks.</li> <li>● Lead major strategic research initiatives, demonstrating advanced problem-solving skills and</li> </ul>

	<p>innovative thinking.</p> <ul style="list-style-type: none"> <li>● Evaluate, update, and integrate research tools and technologies to keep the organization at the forefront of UX research methodologies.</li> <li>● Collaborate with other departments, such as IT and procurement, to ensure seamless integration and support for research operations.</li> <li>● Cultivate and maintain strategic partnerships with key vendors and service providers, negotiating agreements and influencing direction that also benefit our organization.</li> <li>● Drive the adoption of best practices in research operations across the organization, setting a high standard for quality and efficiency.</li> <li>● Oversee the compliance of research tools and operations with global standards and regulations, ensuring ethical and legal use of data and tools.</li> <li>● Implement policies and procedures that safeguard the integrity and confidentiality of research data.</li> <li>● Manage the budget for research tools and operations, ensuring optimal allocation of resources for maximum impact.</li> <li>● Oversee the forecasting and planning for future resource needs, aligning them with the organization's strategic goals.</li> </ul>
<p><b>Strategic communication</b></p>	<ul style="list-style-type: none"> <li>● Develop and oversee a strategic plan for customer engagement that aligns with the company's broader business objectives.</li> <li>● Cultivate key customer relationships at a strategic level, representing the company in industry events.</li> <li>● Lead high-impact customer research initiatives, including executive interviews and strategic customer forums.</li> <li>● Analyze customer interactions to extract strategic insights, influencing the organization's UX Research strategies.</li> <li>● Mentor team members in advanced customer interaction skills, roadmap, empathy, and strategic communication.</li> <li>● Establish and oversee a systematic feedback loop where qualitative research insights are continuously gathered and acted upon.</li> <li>● Implement advanced systems and processes for disseminating research findings across the organization, enhancing decision-making and innovation.</li> <li>● Establish and maintain strategic communication channels with key internal stakeholders, including executive leadership.</li> <li>● Provide expert advice and guidance to senior stakeholders, influencing organizational strategies and policies based on research insights.</li> <li>● Expand and enhance initiatives like the "Every Person a Researcher" (Epar) program, ensuring widespread research literacy and engagement across the organization.</li> </ul>
<p><b>Team Development</b></p>	<p><b>In addition to R7L's responsibilities:</b></p> <ul style="list-style-type: none"> <li>● Lead the strategic initiative to embed a culture of continuous learning and improvement across the organization, not just within the team.</li> <li>● Initiate and support programs that promote knowledge sharing and skill development at all levels of the organization.</li> <li>● Mentor and develop future leaders within the team, focusing on building their strategic thinking, decision-making, and leadership skills.</li> </ul>

	<ul style="list-style-type: none"> <li>• Create opportunities for team members to assume leadership roles in larger, cross-functional projects.</li> <li>• Implement comprehensive development programs that include personalized coaching, mentorship, and career path planning for team members.</li> <li>• Drive initiatives to integrate UX research more deeply into the overall product development and business processes across the organization.</li> <li>• Support and encourage team members to take on facilitator and leadership roles in cross-functional meetings and discussions.</li> <li>• Encourage open and transparent communication within the team, facilitating regular feedback sessions that promote personal and professional growth.</li> <li>• Lead by example, demonstrating a commitment to lifelong learning and professional growth, and encouraging the team to adopt a similar mindset.</li> <li>• Foster an environment where team members are encouraged to share their knowledge and expertise with others, reinforcing a culture of collaborative learning.</li> <li>• Develop initiatives that empower team members to take on more complex and strategic projects, increasing their autonomy and decision-making capabilities.</li> </ul>
<b>Hands-On Managerial Expectations</b>	<p><b>Customer-Focused:</b></p> <ul style="list-style-type: none"> <li>• Have regular customer-facing interactions</li> <li>• Facilitate customer-facing workshops</li> <li>• Conduct customer interviews</li> <li>• Derive and share on-site customer observations</li> </ul> <p><b>Research-Focused:</b></p> <ul style="list-style-type: none"> <li>• Design &amp; research plan together to disambiguate design/research problems</li> <li>• Synthesize qualitative feedback and quantitative data (and evangelize research insights) - gather data (quant &amp; qual) and present it to build evidence for larger initiatives</li> <li>• Address domain-related queries based of research insights</li> <li>• Conduct user research</li> <li>• Create personas</li> </ul> <p><b>Planning-Focused:</b></p> <ul style="list-style-type: none"> <li>• Participate in product design/research feedback sessions</li> <li>• Present the design/research roadmap for the team</li> <li>• Facilitate brainstorming sessions</li> <li>• Collaborate with team on research work</li> <li>• Work on a product component research lifecycle</li> </ul>

R8L Competencies

Competency	Behavioral Indicators
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<b>Strategic Communication</b>	<ul style="list-style-type: none"> <li>● I develop and oversee a comprehensive strategic plan that aligns with the company's broader business objectives, ensuring alignment and integration across all levels of the organization.</li> <li>● I cultivate and nurture key customer relationships at a strategic level, strengthening our market presence and influence.</li> <li>● I lead high-impact customer research initiatives that facilitates organizational decision-making and innovation.</li> <li>● I leverage multiple forums and platforms to communicate, engage the team, and understand their pulse and sentiments.</li> </ul>
<b>Learning Agility - Coaching Others</b>	<ul style="list-style-type: none"> <li>● I execute strategies through people by providing leadership, feedback, coaching, utilizing influence, managing conflict, and developing talent for long-term success.</li> <li>● 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.</li> </ul>
<b>Drive for Results</b>	<ul style="list-style-type: none"> <li>● I set high standards of performance by providing stretch objectives and goals to my team.</li> <li>● I invest time and effort in providing objective feedback and reflect on the learnings to set new process standards and ways of working.</li> <li>● I build &amp; define broad frameworks / models to drive BD objectives within the team or organization.</li> <li>● I have a strong bias for action &amp; promote it in the team as well.</li> </ul>
<b>Business Acumen</b>	<ul style="list-style-type: none"> <li>● I develop and articulate a comprehensive long-term vision for UX Research that is closely aligned with the company's strategic goals and market trends, ensuring clarity and direction for the team.</li> <li>● I research and synthesize industry reports to anticipate future challenges and opportunities in the field of UX Research, leveraging insights to shape the direction of our research initiatives and maintain our industry leadership position.</li> <li>● I mentor and develop senior people managers and team members, focusing on leadership skills, strategic planning, and execution to cultivate a high-performing and resilient team.</li> <li>● I champion the importance of user-centered design and research at the executive level, ensuring that it is a fundamental consideration in all product and service decisions, fostering a culture of user-centricity across the organization.</li> </ul>

# Frequently Asked Questions (FAQs)

**1) What should I do next?**

Have a conversation with your manager on role expectations and required competencies, and your development plan to improve and eventually take on more responsibilities as you grow.

**2) How will we map employees in case they want to move to a different Role / Business Unit (eg. from Research 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.