

Team Career & Competency Frameworks

Business Development (BD)

Update History

Version	Date	Updated by	Remarks
1.0	5 July 2023	Nivedita Bakshi	Framework created & published

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 BD 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 : E1
 - **Title** - example : Business Development Representative

Role & Responsibilities

- **Expectations defined at each level**
- **E1 and E2 are IC roles**
- **EL1 - EL4 are People Manager roles**
- Each level builds on the expectations from previous level
 - Example : EL2 responsibilities include EL1 role + additional expectations
- **All people managers should also shoulder some IC / independent functional goals** apart from managing people and teams
- Movement to the next level happens only after an individual starts performing at the next level
- Role expectations will evolve as the business context changes

Competency Framework

- **Knowledge, skills and attitudes required at each level**
- **Required proficiency of each competency increases as one moves up the levels**

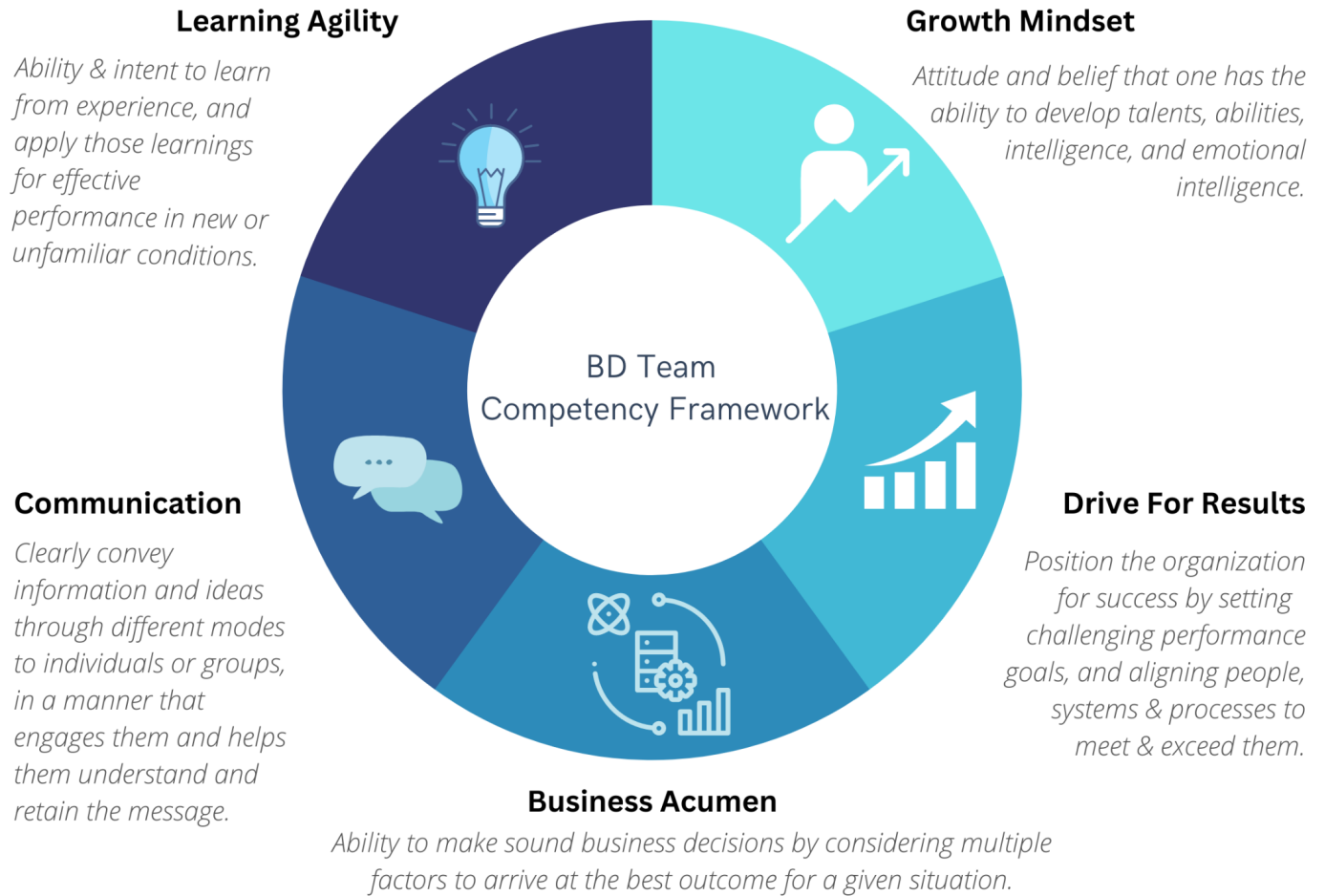
- Movement to the next level happens only after an individual starts exhibiting behaviours at the next level
- **How to read it?**
 - **Competency** - the required knowledge / skill / attitude (example: communication)
 - **Behavioral Indicators** - evidence of proficiency (example: making impactful presentations 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

BUSINESS DEVELOPMENT

CAREER FRAMEWORK



COMPETENCY FRAMEWORK



E1

Business Development Representative

Role Summary		Generate New Business Meetings by expertly pitching Whatfix Value Proposition to prospects.
KRA	Sub-Category	Activities
Hunting	Outbound <i>(Closed Dropped, Competitor Displacement, Events, High Intent or Industry-specific)</i>	<ul style="list-style-type: none"> • Work on assigned set of accounts or leads to generate new business meetings • Prioritize Accounts/Leads based on Industry, Market, Intent, Potential, Need, UseCases, Applications/Solutions • Reachout via Prospecting, Cold Calling, Emailing - Personalised + Sequential, LinkedIn Inmails; follow-up as required. • Generate & nurture potential conversations till converted into NBM (or SAL as defined by business requirements)
	Map potential at an Account or Org level	<ul style="list-style-type: none"> • Identify the contacts in the assigned account using ABM (Demandbase signals and information) • Gather account-level intel from resources like website, annual reports, industry reports, function specific intelligence, tool/implementation level intelligence, current deployments, competitor presence, tech stack • Understand prospect's org structure via mapping of functional vs. economical buyers (decision makers, influencers/app owners, advocates), understand the user base for the app in line
Research	Product & Industry Knowledge	<ul style="list-style-type: none"> • Constantly keeping self updated with new releases, updates in DAP industry, increasing impact of DAP on different industries, understanding of digital transformation roadmap for different industry types (based on focused/targeted industries/segments by Whatfix)
	Salesforce	<ul style="list-style-type: none"> • Daily hygiene of managing lead flows - average response time for all new leads (threshold to be created), update leads' status • Account and Contact list mapping • Log all activities on lead or contact level • Add NBM creation and notes on opp-level along with call recordings for qualification/discovery calls • Capture Notes and steps to follow-up from discovery • Complete daily tasks as updated on the Dashboard (Calls & Email)
Data & Tool Hygiene	Outreach	<ul style="list-style-type: none"> • Ensure all activities driven through Outreach are logged & synced with Salesforce • Understand optimal utilization of Outreach Sequencing model • Manage Sequences to remove redundancies & repetitive entries • Ensure there are no overdue tasks • Ensure all calls are recorded

	LinkedIn Sales Navigator	<ul style="list-style-type: none"> Account & Prospect Research Intelligence Leverage this platform to fetch intel and build persona/lead level + account based target lists
	Miscellaneous	<ul style="list-style-type: none"> Update Sales Assistance Tools on Highspot Leverage Demand Base to gather account-level intel and stay updated on any changes that may occur
Collaboration	External teams	<ul style="list-style-type: none"> Collaborate with DAS-BDs on the opportunities running into the sales cycle Collaborate with PMM team by sharing constant updates on the effectiveness of collaterals and content, providing information on required collaterals/ content Collaborate with ABM & Events team to help evaluate the success of campaigns and events targeting specific audiences or solutions Collaborate with Sales Enablement to meet self-enablement goals and activities As per the business requirement, join the sales/marketing teams in external events
	Internal Team	<ul style="list-style-type: none"> Sharing constant best practices, new findings and ideas to help team experiment and experience success
Key Metrics		<ul style="list-style-type: none"> Number of NBMs Number of calls/activities Number of positive conversations Unique prospects covered Number of SALs (where ever applicable)

E1 Competencies

Competency	Behavioral Indicators
Communication	<p>Written, Verbal & Non-Verbal</p> <ul style="list-style-type: none"> • I write clearly and speak fluently in the language of business. • My email communication is well-crafted, succinct and well-understood by the recipients. • I demonstrate complete presence during calls and discussions. • I share relevant information with prospects that may be helpful to make decisions. I provide them with an honest picture of who we are & how we can help them. • I maintain video conferencing hygiene during all virtual connects. <p>Formal Presentation</p> <ul style="list-style-type: none"> • I present ideas effectively to individuals or groups by delivering presentations suited to the situation and the needs of the audience. • My presentation follows a logical sequence, and I successfully present facts and evidence supporting my main ideas. • I command attention and can manage group processes during the presentation. <p>Listening & Probing Skills</p> <ul style="list-style-type: none"> • I listen patiently & attentively to understand others, ask clarifying questions, and recall important information when needed. • I take into account personal / environmental biases and cultural contexts while receiving messages.
Learning Agility	<ul style="list-style-type: none"> • I follow a systematic approach towards learning on the job. • I have strong intellectual curiosity and ask relevant questions to gain a better understanding and deeper comprehension. • I constantly seek feedback and work on it to improve my performance and capabilities.
Drive for Results	<ul style="list-style-type: none"> • I demonstrate honesty, keep commitments and behave in a consistent manner. • I consistently meet the quality and performance standards set for me. • I plan my day, prioritize my meetings, and ensure that my outreach activities are in line with the goals. • I am not deterred by failures and keep myself motivated to work towards meeting my objectives.
Business Acumen	<ul style="list-style-type: none"> • I deep dive to understand prospect goals, short/long-term roadmap and how Whatfix can meet their requirements and create value. • I am keen to know more about Whatfix products and their new features, and actively take refresher product training courses to stay updated. • I am passionate about building my understanding & knowledge of client applications and tools.

Growth Mindset	<ul style="list-style-type: none"> • I take steps and measures every day to progress towards meeting my objectives. • I step out of my comfort zone to take on new challenges and explore new opportunities. • I constantly seek novel ways to address challenges and revise my approach.
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E2

Digital Adoption Strategist - Business Development

Role Summary		Drive NBM to SAL conversion, or generate new SAL as per business requirements
KRA	Sub-Category	Activities
Hunting	Outbound <i>(Closed Dropped, Competitor Displacement, High Intent, Events or Industry-Specific)</i>	<ul style="list-style-type: none"> • Run detailed discovery calls and teaser demos for calls set up by the BDRs. In certain motions, run the complete cycle independently. • Based on intel collected during discovery - work on Customized Demoss for mutually-agreed use cases and app instances with SC & AE. • Evaluate impact and work on the timeline element. • Map opportunities based on potential (possible no. of opps), need, use cases, applications/solutions, user base, and involve all stakeholders (functional + economical buyers engaged). • Reach Outs - nurture & persistently follow-up via calls, LinkedIn and emails. Multi Thread within accounts to generate interest in other departments if a stronger case needs to be made. • Goals - nurture discovery-level opps and convert into SALs for MoFo for New Business and Expansions. • Explore and Map: PoC potential and requirements or Mutual Success Plan for the post-demo stages (MSP - can be defined with specific information with the help of SC and Sales).
	Map potential at an Account or Org level	In addition to E1 responsibilities: <ul style="list-style-type: none"> • Conduct thorough pre-discovery use-case research (industry-specific and horizontal specific/job title specific). • Build a basic understanding of the customer and their competitor, market and technology before the initial conversation. • Actively pursue new product GTM (ex. mobile, analytics, NudgeAlong, etc) to the potential TOFU level accounts.
Research	Product & Industry Knowledge	In addition to E1 responsibilities: <ul style="list-style-type: none"> • Learn new use cases cracked via new SALs across the teams and new customers signed.

Data & Tool Hygiene	Salesforce	In addition to E1 responsibilities: <ul style="list-style-type: none"> • Ensure all internal stakeholders are mapped on Opp level - AE, SC, CS, PM etc. along with Contact Roles: DM, Inf., Advocate, Champion, etc. • Ensure accurate pipeline values/stages are added for all your SALs at the time of transition
	Outreach	In addition to E1 responsibilities: <ul style="list-style-type: none"> • Manage sequences for multithreading with personalized sequences for ongoing NBM conversations.
Collaboration	External Teams	In addition to E1 responsibilities: <ul style="list-style-type: none"> • Collaborate with the AEs on the opportunities running into the sales cycle. • Collaborate with Campaign marketing team to strike a balance with the cover fire from the Marketing automation messaging. • Collaborate with Field Marketing team to track event roster, stay updated with the upcoming events, tuned on the event-specific positioning and messaging. • Collaborate with Performance Marketing & partner teams for app-specific outreach sequencing to event campaigns, Sales War Rooms & RFP support as applicable
	Internal Teams	In addition to E1 responsibilities: <ul style="list-style-type: none"> • Share best practices with the team - help BDRs improve prospect qualification and disqualification. • Share use cases from successful SALs across the DAS, BD and BDR teams. • Find solutions to roadblocks pertaining to hitting the targets and goals on individual as well as team level. • Participate or lead new initiatives identified by the business unit or by self.
Key Metrics		<ul style="list-style-type: none"> • Total no. of SALs achieved • NBM/Opportunities to SAL conversion percentage - in-quarter or/& overall • No. of discovery calls converted to NBM/Opportunities • No. of new NBMs/opportunities created within the accepted accounts • No. of positive conversations • No. of calls & activities • SAL to POC conversion percentage

E2 Competencies

Competency	Behavioral Indicators
Communication	<p>Verbal & Non-verbal</p> <ul style="list-style-type: none"> • I always exhibit a highly professional demeanor in both verbal and non-verbal communication with internal & external stakeholders. • I successfully represent Whatfix to external stakeholders to create the right impact. • I anchor, sustain and close long-looped conversations for high-profile opportunities. • I can recognize discrepancies between the speaker's verbal and non-verbal communication and modify the messaging accordingly. • I convey complex ideas at a level appropriate to the audience using ideas/terminology they understand. <p>Formal Presentation</p> <ul style="list-style-type: none"> • I effectively use non-verbal communication to convey the right message during my presentation. • I am effective in a variety of formal presentation settings: one-on-one, small and large groups, with peers, juniors and leaders. • I am very comfortable with addressing all lines of questioning during/after my presentation, thus meeting the objectives of my presentation at all times. • I focus on prospects' needs while addressing the questions instead of only focusing on the set agenda to be discussed. <p>Listening & Probing Skills</p> <ul style="list-style-type: none"> • I practice active listening to understand others' thoughts / emotions and affirm my understanding by paraphrasing what was heard. • I listen, observe and probe closely to identify the expressed and unexpressed sentiments
Learning Agility	<ul style="list-style-type: none"> • I have a high speed of learning and grasp things quickly. • I seek new, more effective ways to address problem statements. • I have a deep comprehension of concepts and their application and help others build the same. • I enjoy complex problems and challenges associated with new experiences.
Drive for Results	<ul style="list-style-type: none"> • I go above & beyond to ensure that my efforts result in desired outcomes. • I actively engage with passive/dormant prospects to reinitiate the relationship and create opportunities. • I effectively inform and mobilize resources (people, knowledge, data, etc.) to meet the prospect's objectives and expectations. • I contribute to improving work practices, outcomes and team performance. • I make efforts to optimise process workflows by using different tools & technologies. • I successfully steer inter-departmental work sprints to achieve desired outcomes.

Business Acumen	<ul style="list-style-type: none"> • I am proficient in connecting the dots between the right product feature and prospect needs and focus. • I look for ways to add value beyond prospects' immediate use cases. • I anticipate prospects' upcoming needs and concerns based on my knowledge, expertise and research on the organisation and industry landscape.
Growth Mindset	<ul style="list-style-type: none"> • I give equal attention and effort to improving my weaknesses as I do playing by my strengths. • I have high resilience and maintain consistency in face of failures. • I am comfortable with change and work towards taking it in my stride as opposed to being resistant to it.

EL1

Team Lead - BDR / Team Lead - DAS-BD

Role Summary		Drive high performing team of BDRs/DAS-BDs to meet NBM & SAL targets for a region / sales motion / solution vertical
KRA	Sub-Category	Activities
Driving High Performing Teams	Functional Coaching	<ul style="list-style-type: none"> • Coach BDRs on calling and communication - weekly reviews, insights and share feedback from calls with the BDRs • Connect 1:1 with the team to understand their strategy for each target account, help revise sequences & messaging, provide guidance as needed • Help the team ideate on account strategy, campaigns and reach-out methods • Listen to recorded calls, shadow live calls weekly & provide documented actionable feedback • Mentor new BDRs in their initial stages, shadow their calls, introduce them people, process, product thus ensuring a quick ramp up
	Increasing Team Efficiency	<ul style="list-style-type: none"> • Drive each BDR to attain a min. of 60% of the target QoQ • Drive the team towards building a pipeline for the next quarter • Align the BDRs to clear goals and behavioral expectations • Ensure more than 50% of the team members are at 100% target attainment

	Team Management	<ul style="list-style-type: none"> • Build foundational capabilities within the BD function by setting individual development goals and provide learning opportunities in partnership with enablement team • Drive all organizational people process for the team • Have timely career conversations with each eligible team member • Identify weak links and ensure the right guidance/enablement opportunities are provided to them. • Build a healthy and transparent work culture within the team.
Functional Excellence		<ul style="list-style-type: none"> • Brainstorm on campaigns / content / communication / messaging based on biz and customer landscape to maximize success ratio • Cater to existing accounts, and cross-sell / up-sell by creating new buying centres to expand Whatfix footprint • Research on industry and solution area landscape to identify logos that haven't been targeted yet to plan for the future • Join weekly/monthly/quarterly connects for the assigned verticals/ industry/ solution areas for latest updates and share data & insights from ongoing activities • Join the customer conversations after initial connects are done and the lead looks promising
Cross-Functional Collaboration		<ul style="list-style-type: none"> • Identify opportunities to collaborate within and outside the Marketing team. • Run weekly cadence to improvise on existing ABM campaigns/upcoming round tables/marketing automation and share feedback • Collaborate with AEs to define the opp progress • Collaborate with DAS BDs to define the NBM progress
Data & Tool Hygiene		<ul style="list-style-type: none"> • Manage the tool efficiency at a BDR level. • Track usage and effectiveness of each tool used by the team and function and share insights on their relevance with the management. • Collaborate with Marketing Ops and Sales Ops to align all team-specific reports w.r.t accounts, leads, opps, contacts for each BDR. • Generate & share daily, weekly, monthly, quarterly target vs. attainment reports. • Track overall team and activity goals and remedial actions wherever necessary.
Key Metrics		<p>For all TL roles:</p> <ul style="list-style-type: none"> • IC quota as per business requirement • Aggregated team SALs/NBMs • % of team at >100% attainment • % of team at > 60% attainment • NBM Actual to NBM Accepted % • Monthly Outbound Performance Scorecard <p>For TL BD:</p> <ul style="list-style-type: none"> • NBM Set to executed % • Maintaining healthy monthly contact research count across BD <p>For TL DAS BD:</p> <ul style="list-style-type: none"> • NBM/Nurture NBM to SAL conversion % for current & upcoming quarters

	<ul style="list-style-type: none"> • NBM Set to executed % • Closed Drop % • SAL to POC conversion percentage
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EL1 Competencies

Competency	Behavioral Indicators
Communication	<p>Verbal & Non-verbal Communication</p> <ul style="list-style-type: none"> • I guide the team on communicating persuasively, handling objections proactively, and identifying what will convince the other party of their point of view. • I successfully drive critical conversations for my/team's high-value prospects. • I communicate effectively to establish a strong connect with the prospects. • I actively build trust with internal & external stakeholders by demonstrating my understanding through open discussions. <p>Formal Presentation</p> <ul style="list-style-type: none"> • I convey the message convincingly both inside and outside the organization, on both cool (data) and hot (controversial) topics. • I seamlessly change tactics midstream when something isn't working. • I am comfortable factually debating on objections and respectfully agreeing to disagree on topics if needed. <p>Listening & Probing Skills</p> <ul style="list-style-type: none"> • I seek out and incorporate others' ideas to arrive at the best possible solutions.
Learning Agility - Coaching Others	<ul style="list-style-type: none"> • I identify skill areas to be developed in my team members and provide the required learning impetus. • I guide my team to learn from their / group's mistakes. • I invest time and resources to help my team learn, grow and develop.
Drive for Results	<ul style="list-style-type: none"> • I set realistic targets for myself and for the team; ensure the availability of resources and support the BD team in achieving results. • I monitor progress and performance; evaluate achievements and integrate lessons learned in future plans of action. • I help my team generate breakthrough ideas, fresh perspectives and new approaches to meet prospect needs.
Business Acumen	<ul style="list-style-type: none"> • I bring a clear understanding of prospect applications, business & industry trends and relevant use cases that will help them make decisions, and guide my team to build this skill. • I have strategic discovery conversations to identify the latent needs of the prospects. • I monitor, evaluate and, if needed, modify the team's approach towards engaging different accounts.

Growth Mindset	<ul style="list-style-type: none"> • I guide my team to have positive self-talk when faced with challenges. • I have retrospective conversations (<i>what was done & what was learned</i>) with my team to help them reflect and grow without fearing failure. • I build and invest in relationships to earn the team's trust.
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EL2

Lead - BD <Sales Motion / Region / Solution >

Role Summary	Drive high-performing teams of ICs and People Managers in assigned regions / sales motions / solution verticals to meet NBM & SAL targets
KRA	Activities
Drive High Performing Teams	<ul style="list-style-type: none"> • Translate the overall goals in region-specific goals and create non-negotiable win plans. • Identify & suggest performance-centric IC goals. • Coach and guide Team Leads to develop and hone their managerial skills. • Monitor the performance of all team members, provide early feedback, raise red flags where required and keep the performance levels high. <ul style="list-style-type: none"> ○ Prepare and revise performance plans for the team members as needed. ○ Conduct quarterly reviews for the team and plan ahead. ○ Collaborating with TLs to create IC-specific plans. ○ Creating TL success metrics and TL-specific IDPs. • Identify motivational team-specific reward milestones. • Identify the team's potential as per regional TAM and deploy resources / optimize efficiency for maximum gains. • Ensure development focus within the team via individual development plans, learning plans and LinkedIn Learning paths. • Ensure all eligible employees undergo at least 1 career conversation in a year.
Functional Excellence	<p>In addition to EL1 responsibilities:</p> <ul style="list-style-type: none"> • Review & revise strategies quarter-on-quarter based on performance and progress. • Research on industry and solution area landscape to identify logos that haven't been targeted yet to plan for the future. • Find sweet spots in territories, where new buying centres can be tapped via collaboration. • Build processes to attain efficiency and excellence, and make them repeatable. • Set guidelines for different processes and drive compliance within the team. • Periodically work on process enhancement initiatives. • Resolve cross-functional conflicts smoothly and mitigate risks to productivity. • Work with the sales/enablement/PMM leadership and on identifying the goals, short and long

	term and create action plans with the help of the leadership.
Cross-Functional Collaboration	<ul style="list-style-type: none"> • Ensure team performance, plans and stories are transparently presented across stakeholders in a periodic fashion. • Share data-driven feedback to various GTM channels to ensure strategy realignment for the set goals and objectives. • Collaborate within the marketing function to ensure SLAs are created and adhered to. • Collaborate with the Sales team for appropriate transition and pipeline visibility. • Collaborate with PMM to create and manage feedback loop.
Key Metrics	<ul style="list-style-type: none"> • Aggregated team specific SALs/NBMs • 20% of the team (at least 1) at >100% attainment • 60% of the team at > 60% attainment • NBM Set to executed % • Forecast accuracy • Managers managing TL-DAS-BD: <ul style="list-style-type: none"> ○ Nurture NBM to SAL conversion % ○ NBM to SAL conversion % (overall) ○ Closed Drop Percentage (minimum) ○ SAL to POC conversion percentage • Managers managing TL-BDR: <ul style="list-style-type: none"> ○ NBM to SAL conversion ○ NBM Actual to NBM Accepted %

EL2 COMPETENCIES

Competency	Behavioral Indicators
Strategic Communication	<ul style="list-style-type: none"> • I communicate impactfully to cast a good first impression, command attention and respect, showing an air of confidence. • I successfully de-escalate high-pressure situations with important stakeholders through careful, well-crafted verbal and written communication. • I role-model openness and transparency in sharing and receiving information to set the right expectations within the team.
Learning Agility - Coaching Others	<ul style="list-style-type: none"> • I mentor & coach teams to widen their thought process and enable continuous growth & development. • I build cooperation between departments and work groups. • I actively develop rapport with a variety of people and guide my team in building trust & strengthening relationships. • I deal effectively with all races, nationalities, cultures, disabilities, ages, sexes, and life perspectives.

Drive for Results	<ul style="list-style-type: none"> • I focus on encouraging more efficient processes thereby promoting faster goal closure. • I develop team capability by proactively identifying the skill gaps and role requirements. • I ensure adherence to all performance-driven processes and practices.
Business Acumen	<ul style="list-style-type: none"> • I share trends and transformations in the region / solution area / market segment with the leadership to influence changes in the overall approach and strategy. • I strategically align internal efforts (process, content, offerings, etc.) around the prospect's needs. • I bring the focus of the team towards new prospects and actively plan to reach out to them.
Growth Mindset	<ul style="list-style-type: none"> • I encourage and motivate my team by showcasing opportunities in midst of crises. • I provide clarity to the team on their growth paths to help them envision a future beyond their current goals. • I break silos and drive an inclusive culture within and outside the team.

EL3

Head - BD <Sales Motion / Region / Solution>

Role Summary	Define the functional roadmap and execute it successfully through a high-performing team to meet the revenue & pipeline targets for the assigned regions / sales motions / industry verticals.
KRA	Activities
Strategic Leadership	<ul style="list-style-type: none"> • Make strategic plans to meet, beat and exceed NBM, SAL and Pipeline Generation targets. • Workforce planning to ensure target achievement & putting mitigating plans in place wherever required. • Identify new avenues, improvise on existing SOPs and drive key initiatives. • Strategize & realize company-specific OKRs. • Future proofing the function by planning in advance be it capacity, market, process, etc. • Work closely with the Marketing BD and Sales leadership to identify the business need on regular basis and make adequate changes to the strategy to scale. • Drive cross-functional collaboration, planning and management on projects (within and outside Marketing BU). • Responsible for the cost and efficiency metrics for the assigned regions/ sales motions/ industry verticals.
Drive High Performing Teams	<ul style="list-style-type: none"> • Build a motivated team, and create & sustain a healthy work environment. • Guardian of Whatfix Principles and cultural codes. • Ensure healthy retention of employees in the function. • Ensure right career growth path and growth stories. • Build clarity on team vision & mission, goals and roadmap, accountability and decision-making flows across the team.

	<ul style="list-style-type: none"> • Encourage delegation for the managers to build a more coaching/strategic perspective and for the team member to take on new initiatives. • Prioritize team morale and productivity, and celebrate their successes. • Drive innovation within the team through process enhancements, adopting industry best practices, planning new initiatives
Key Metrics	<ul style="list-style-type: none"> • Pool of ramped BDRs at any given point of time • Region-specific pipeline target (Quarterly/Annual) • LE Opportunity target (quarterly Annual) • Team-specific SALs and/or NBMs • 80% Forecast accuracy • Funnel conversion % (NBM created to NBM Actual and/or NBM to SAL) • Nurture conversion (current quarter or overall) • Closed dropped % • SAL to POC conversion % • Cost & Efficiency as defined for the assigned region/sales motion/industry vertical

EL3 Competencies

Competency	Behavioral Indicators
Strategic Communication	<ul style="list-style-type: none"> • I successfully hold executive-level conversations to build trust and commitment. • I participate in confidential & critical business meetings or discussions. • I demonstrate a strong ability to challenge assumptions. • I can successfully probe to identify gaps missed by my teams to have an insightful discovery process.
Learning Agility - Coaching Others	<ul style="list-style-type: none"> • I accurately access the potential barriers and resources for change initiatives and guide the team to success. • I envision and articulate the intended result of the change process in a manner the team understands. • I promptly switch strategies or tactics if the current ones are not working. • I provide mentoring / guidance and share relevant opportunities to build managerial capabilities within the BD team.
Drive for Results	<ul style="list-style-type: none"> • I inspire the team to be result driven and motivate them to go over & beyond. • I set high standards of performance by providing stretch objectives and goals to my team. • I invest time and effort in providing objective feedback and reflect on the learnings to set new process standards and ways of working. • I build & define broad frameworks / models to drive BD objectives within the team or organization. • I have a strong bias for action & promote it in the team as well.
Growth Mindset	<ul style="list-style-type: none"> • I actively build a culture where the team takes risks, innovates and expresses their ideas. • I have strong situational awareness - can see around & beyond the targetted area. I keep my

- vision circular rather than linear.
- I set high people and process standards to remove mediocrity and complacency.

EL4

Global Head of Business Development

Role Summary	Define and lead the BD strategy to meet Whatfix ARR and Pipeline targets
KRA	Activities
Strategic Leadership	<ul style="list-style-type: none"> • Build the business development strategy to meet the short-to-medium term organizational objectives through balanced growth from all teams and sales strategies. • Exceed defined targets for NBM, SAL and Pipeline generation. • Ensure there are high-performing teams with the required capabilities to meet monthly / quarterly / annual goals and targets. • Create a roadmap for higher growth and new opportunities in targeted areas. • Set and achieve the function cost & efficiency metrics for all regions, sales motions and industry verticals. • Ensure that the BD team has enough resources ramped up in each team to achieve the required target • Ensure career growth plan for all team members to make Whatfix a go to place for Business Development. • Develop plans and strategies to offset external/macro/micro-economic changes. • Connecting with the ground reality and making sure the problems at the bottom are communicated to their team leads and managers.
Drive High Performing Teams	<ul style="list-style-type: none"> • Build a motivated team, and create & sustain a health work environment. • Ensure operational efficiencies across teams, regions and industry verticals. • Role model Whatfix Principles and actively promote a team culture that builds capabilities for tomorrow. • Bring in, drive and manage organizational and functional-level change. • Regularly present team's performance and success stories to different GTM teams.
Key Metrics	<ul style="list-style-type: none"> • SAL • Pipeline • E/LE Logos • Hiring and Retention • Enablement and Certifications • All sales motions contributing towards pipeline • Cost & Efficiency as per company standards

EL4 Competencies

Competency	Behavioral Indicators
Strategic Communication	<ul style="list-style-type: none"> • I remain open to ideas, listen to others and objectively consider their ideas and opinions even when they conflict with my own. • I bring all stakeholders together by influencing and articulating the big picture to them in a manner that they best understand. • I successfully represent Whatfix to external stakeholders to create the right impact in cross-cultural contexts. • I listen with accuracy to discriminate facts from opinions, analyze facts to understand messages, and remember significant details from conversations. • I leverage multiple forums and platforms to communicate, engage the team, and understand their pulse and sentiments.
Learning Agility - Coaching Others	<ul style="list-style-type: none"> • I provide mentoring / guidance and share relevant opportunities to build leadership capabilities within the BD team. • I drive continuous focus on development and coaching to ensure capability improvement at all levels of team hierarchy.
Drive for Results	<ul style="list-style-type: none"> • I focus on aligning the BD team's focus to Whatfix objectives and key results. • I actively share the roadmap with the team and invite thoughts and participation in formulating the strategies for the future. • I actively work with the leadership and HR partners to build a high-performing team and create a productive work culture. • I establish decision-making processes and drive their understanding and compliance.
Growth Mindset	<ul style="list-style-type: none"> • I drive growth beyond revenue targets by focusing on people and helping them grow. • I embrace uncertainty and ambiguity to find new opportunities

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 career role / Business Unit (eg. from BD to AE or any other Marketing role)?

DAS-BDs can transition to AE roles if they are so inclined. 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 you have 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, 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 (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? For eg. I am Team Lead so will it be EL2 or EL3 or EL4.

The new level (can be higher as well as lower) will be governed by the competency framework defined above and further depend on the assessment conducted by Marketing 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.