

# Expectations for design roles

Career progression and professional growth is important at Addepar. To help designers in individual contributor roles carve their career paths, we provide an expectations grid that's used to guide development discussions between the makers and their managers.

**IC-1** Designer / Researcher / Writer

**IC-2** Designer II / Researcher II / Writer II

**IC-3** Sr. Designer / Researcher / Writer

**IC-4** Staff Designer / Researcher / Writer

**IC-5** Sr. Staff Designer / Researcher / Writer

**IC-6** Principal Designer / Researcher / Writer

**IC-1** **Designer / Researcher / Writer** Executes assigned tasks with guidance while developing craft and knowledge. Completes defined tasks under oversight, engages with enthusiasm and curiosity, and becomes a reliable contributor.

Expertise & Quality	Strategy & Vision	Community & Stewardship	Advocacy & Influence	Autonomy & Initiative	Communication & Teamwork
<ul style="list-style-type: none"><li>Solicits feedback proactively and receives and acts on critical feedback positively.</li><li>Reflects thoughtfully on how they and the team can improve.</li><li>Demonstrates availability and presence on the teams.</li><li>Exhibits curiosity and enthusiasm in work.</li></ul>	<ul style="list-style-type: none"><li>Proactively develops their knowledge of Addepar's platform, products, users, competitors, and success metrics in connection with their tasks.</li><li>Asks the right questions to understand what they're delivering, for whom, and why it matters.</li><li>Explores different approaches to their projects, identifying pros and cons, questions, and implications.</li></ul>	<ul style="list-style-type: none"><li>Solicits feedback proactively; receives and acts on critical feedback positively.</li><li>Reflects thoughtfully on how they and the team can improve.</li><li>Demonstrates availability and presence on their teams.</li><li>Exhibits curiosity and enthusiasm in their work.</li><li>Seeks out and participates in opportunities to learn from others.</li><li>Contributes positively to Addepar's culture.</li></ul>	<ul style="list-style-type: none"><li>Builds empathy for users.</li><li>Articulates user goals and pain points in the context of projects.</li></ul>	<ul style="list-style-type: none"><li>Estimates and completes assigned tasks reliably.</li><li>Seeks clarity and support proactively when needed.</li><li>Recognizes and escalates blockers in a timely manner to the appropriate person.</li></ul>	<ul style="list-style-type: none"><li>Communicates progress proactively to the team to ensure visibility.</li><li>Follows established team processes and workflows.</li></ul>

**IC-2** **Designer II / Researcher II / Writer II** Independently delivers results by owning projects of moderate scope and maturing craft and knowledge. Manages workload independently, executes with some oversight, and supports collaborators.

Expertise & Quality	Strategy & Vision	Community & Stewardship	Advocacy & Influence	Autonomy & Initiative	Communication & Teamwork
<ul style="list-style-type: none"><li>Demonstrates solid skills in the area of expertise and methodically deepens craft.</li><li>Actively develops expertise in our tools and processes and identifies opportunities to refine them.</li><li>Exhibits strong user-centered rationale in their work and solves problems holistically.</li><li>Maintains a strong eye for quality and consistency.</li><li>Produces deliverables that effectively facilitate hand-off and future development.</li></ul>	<ul style="list-style-type: none"><li>Uses product knowledge, client insights, and competitive intel to inform their work.</li><li>Develops a solid understanding of their focus area's long-term goals and ensures their work contributes to them.</li><li>Identifies future challenges and opportunities for their team.</li><li>Conducts the right level of exploration within project constraints.</li></ul>	<ul style="list-style-type: none"><li>Seeks opportunities to improve their work and the team's processes.</li><li>Shares constructive feedback on others' work.</li><li>Welcomes and guides new hires, conveying important information.</li><li>Escalates conflict to the appropriate individual.</li></ul>	<ul style="list-style-type: none"><li>Acts regularly on opportunities to center user perspectives in cross-functional teams.</li></ul>	<ul style="list-style-type: none"><li>Manages project work independently.</li><li>Scopes work effectively and adjust plans as needed to meet project goals.</li><li>Persists in getting a resolution for the blockers they've escalated.</li></ul>	<ul style="list-style-type: none"><li>Communicates and collaborates effectively with teammates and stakeholders to ensure project alignment.</li><li>Contributes to constructive conversations about improving team processes and collaboration.</li></ul>

**IC-3** **Sr. Designer / Researcher / Writer** Achieves outcomes through planning and driving projects of significant scope and influence, contributing expertise to their cross-functional team. Executes independently with general guidance, collaborates effectively to ensure high-quality delivery, and propels improvements to team practices.

Expertise & Quality	Strategy & Vision	Community & Stewardship	Advocacy & Influence	Autonomy & Initiative	Communication & Teamwork
<ul style="list-style-type: none"><li>Demonstrates a firm command of their craft and skills in their discipline.</li><li>Applies effective approaches, tools, and methods consistently to any given project.</li><li>Articulates effective principles and exhibits clear systems thinking in their work.</li><li>Attends to details and achieves a high level of polish and quality in their team's deliverables.</li><li>Increases consistency and quality within their team's focus areas.</li></ul>	<ul style="list-style-type: none"><li>Consistently makes sound, outcome-driven decisions based on their broad understanding of their product area, users, roadmap, and competitive landscape.</li><li>Advances the user experience and contributes to the future vision of their product area, aligned with Addepar's broader goals and vision.</li><li>Identifies and articulates key risks and trade-offs for their projects.</li><li>Uses data to focus on the right problem to solve for a given initiative.</li></ul>	<ul style="list-style-type: none"><li>Guides others in their area of expertise by explaining the concepts and reasoning behind important information.</li><li>Upholds Addepar's high bar for design, both for themselves and for others.</li><li>Participates actively in Addepar's interview process and helps the team evaluate great candidates.</li><li>Initiates difficult conversations in a timely and tactful manner, and resolves conflict without needing to escalate.</li></ul>	<ul style="list-style-type: none"><li>Brings a strong user-centered perspective to product area to influence projects and roadmaps.</li><li>Shares and champions the team's work to create visibility and elevate its impact.</li></ul>	<ul style="list-style-type: none"><li>Plans and drives initiatives.</li><li>Sets challenging but realistic scopes and timelines for projects with increasing complexity.</li><li>Unblocks themselves by navigating ambiguity, devising effective pivots, and making continuous progress.</li></ul>	<ul style="list-style-type: none"><li>Manages project stakeholders, anticipating questions and needs.</li><li>Facilitates team discussions to build consensus and move initiatives forward.</li><li>Connects personal work with the work of other teams to uncover dependencies, align plans, coordinate efforts, and build alignment.</li></ul>

**IC-4** **Staff Designer / Researcher / Writer** Exercises ownership over the entirety of their assigned product area and cross-functional team. Leads complex initiatives that require significant stakeholder management, shapes projects, guides others in execution, and optimizes outcomes. Influences the discipline broadly, empowers peers through deep expertise, and sets the quality bar for the discipline.

Expertise & Quality	Strategy & Vision	Community & Stewardship	Advocacy & Influence	Autonomy & Initiative	Communication & Teamwork
<ul style="list-style-type: none"><li>Offers deep expertise in their discipline that is well sought-after.</li><li>Researches, pioneers, and leads the adoption of new tools and methodologies within their discipline.</li><li>Creates elegant, systematized, and scalable solutions to complex challenges.</li><li>Sets a benchmark for quality through work that others strive to emulate.</li></ul>	<ul style="list-style-type: none"><li>Makes strategic decisions based on their broad knowledge of their product areas, vision, market landscape, and industry trends.</li><li>Crafts compelling visions for their product area that deliver a premium user experience and contribute to a broader business strategy.</li><li>Prioritizes the most impactful workstreams effectively.</li></ul>	<ul style="list-style-type: none"><li>Empowers peers to achieve higher performance and foster a supportive culture.</li><li>Mentors and provides guidance, coaching, and constructive feedback to their peers and across teams.</li><li>Brings a strong perspective that motivates others to develop pragmatic solutions to complex problems.</li><li>Sources, selects, and actively champions great candidates.</li></ul>	<ul style="list-style-type: none"><li>Educates cross-functional partners and stakeholders proactively on the value and impact of the team's work.</li><li>Drives the adoption of user advocacy practices and tools.</li><li>Evangelizes design thinking and champions a mature design culture throughout Addepar.</li></ul>	<ul style="list-style-type: none"><li>Leads the planning and execution of strategic, multi-phase initiatives within the team and shapes work for others.</li><li>Anticipates potential trade-offs and hidden dependencies early in the planning process.</li><li>Navigates ambiguity effectively and manages complex, high-stakes projects.</li><li>Unblocks others and adapts plans to account for shifting priorities and team capacity.</li></ul>	<ul style="list-style-type: none"><li>Conveys the strategic value of the team's work to stakeholders, partners with them proactively throughout the process, and creates a compelling narrative around the solution.</li><li>Facilitates productive conversations to address process breakdowns or inefficiencies and drive the team toward solutions.</li><li>Drives alignment and effective collaboration across multiple teams, ensures a shared vision, and enables coordinated delivery.</li></ul>

**IC-5** **Sr. Staff Designer / Researcher / Writer** Provides leadership over a broad group of products and cross-functional teams. Shapes strategy and roadmaps for department-level objectives, steers highly complex initiatives across multiple teams, and maximizes outcomes. Cultivates organization-wide growth through expansive expertise and unique knowledge, and elevates UXD practices at Addepar.

Expertise & Quality	Strategy & Vision	Community & Stewardship	Advocacy & Influence	Autonomy & Initiative	Communication & Teamwork
<ul style="list-style-type: none"><li>Acts as a definitive voice for their discipline, leveraging their broad expertise and unique knowledge.</li><li>Defines long-lasting principles and best practices that scale across broad areas of UX.</li><li>Creates exemplary work that establishes new precedents for the UXD organization.</li></ul>	<ul style="list-style-type: none"><li>Possesses a deep understanding of the entire Addepar platform, all client segments, personas, and the broader industry landscape, and uses this knowledge to shape the UXD org strategy.</li><li>Defines the problem space and high-impact opportunities for large-scale, cross-functional initiatives.</li><li>Architects and stewards the end-to-end user experience vision, cultivating adoption and loyalty.</li></ul>	<ul style="list-style-type: none"><li>Shapes UXD's strategic approach to intuitive user experience, brand consistency, and user advocacy.</li><li>Uses their broad expertise to create systems, frameworks, and strategies that advance other Addepeeps' skills in their discipline.</li><li>Builds an inclusive design culture where those with less experience and influence have a voice and can make an impact.</li><li>Mentors extensively to help scale knowledge across multiple teams and the broader UXD organization.</li><li>Seeks learning opportunities from industry leaders and brings new insights and knowledge back to the organization.</li></ul>	<ul style="list-style-type: none"><li>Influences the strategic direction of other teams to ensure alignment with company goals.</li><li>Ensures the user voice is consistently integrated into business decisions.</li><li>Contributes to building UXD as a recognized brand within design and fintech communities.</li><li>Elevates Addepar's brand externally on a regular basis.</li></ul>	<ul style="list-style-type: none"><li>Shapes the strategy and roadmaps across multiple teams and products to achieve organizational objectives.</li><li>Sees ambiguous situations as opportunities to innovate and lead; creates clarity out of chaos with mastery and confidence.</li><li>Solves problems proactively and creatively to unblock teams, recognizing when to push beyond the existing project scope to find a better solution.</li></ul>	<ul style="list-style-type: none"><li>Bridges communication between leadership and individual contributors to ensure clarity and alignment.</li><li>Establishes and refines repeatable processes and execution frameworks that ensure quality, consistency, and efficiency across multiple teams.</li></ul>

**IC-6** **Principal Designer / Researcher / Writer** Produces work that has major bottom-line impact and yields strategic value for Addepar. Sets long-term vision and strategy for company-wide objectives, drives initiatives of the highest complexity across the organization, and creates transformative business impact. Acts as a force multiplier whose thought leadership elevates Addepar.

Expertise & Quality	Strategy & Vision	Community & Stewardship	Advocacy & Influence	Autonomy & Initiative	Communication & Teamwork
<ul style="list-style-type: none"><li>Serves as a thought leader in their discipline, inspiring others within the company and across the industry.</li><li>Elevates the standard of work not only at Addepar but in the industry.</li></ul>	<ul style="list-style-type: none"><li>Defines the future of Addepar as a platform, business, and company through their vision.</li><li>Inspires and transforms Addepar's brand and user experience through their work.</li><li>Originates and champions key strategies that shape Addepar's long-term competitive advantage.</li><li>Spearheads and propels company-wide innovation.</li></ul>	<ul style="list-style-type: none"><li>Leads decisions across UXD to optimize team efficiency and understanding, continually pushing the UXD team forward.</li><li>Exerts thought leadership in multiple areas, educating others, sharing best practices, and providing strategic and prescriptive guidance.</li><li>Mentors and cultivates future leaders, scaling their influence across the organization.</li><li>Builds lasting bridges between disciplines, fundamentally changing how the organization works.</li></ul>	<ul style="list-style-type: none"><li>Serves as a recognized, unifying force that enables collaboration across the entire company.</li><li>Acts as a trusted partner to senior R&amp;D leadership.</li><li>Establishes himself and Addepar's UXD team as thought leaders in the design industry.</li><li>Represents Addepar as an industry leader in its approach and methodologies.</li></ul>	<ul style="list-style-type: none"><li>Defines cross-org goals that support long-term, measurable impact for the entire company.</li><li>Delivers high-impact outcomes through strategic planning and execution and maintains accountability for results.</li><li>Pursues opportunities that improves speed and quality across the organization relentlessly.</li></ul>	<ul style="list-style-type: none"><li>Aligns plans effectively with senior leadership and adapts contribution style (e.g., through craft, systems, or storytelling) to create maximum value.</li><li>Identifies systemic process issues that impact the entire company and proposes user-centric solutions.</li></ul>