

Overview

Kareo recognizes that members of the engineering organization need to be provided a career progression that is aligned with both the individual and the company. This document will attempt to summarize technical and managerial paths as well as capture the minimum values and behaviors necessary to progress.

TRACK TITLES

The current engineering, technology management, and team management titles are summarized below:

Associate Software Engineer	
Software Engineer	
Senior Software Engineer	
Team Management	Technology Management
Manager	Principal Engineer
Sr. Manager	Sr. Principal Engineer
Director	

TRACK RESPONSIBILITIES

The responsibilities of an engineering candidate will differ significantly when they choose either the managerial track or the technical track. Those on the technical track will be more broadly responsible for the design, development, and integrity of one or more technology tiers. Whereas those on the managerial track will spend more time on personnel, inter/intra team management, and ensuring that their project teams are positioned for success.

Culture

WHAT ARE THE CORE VALUES FOR A PROSPECTIVE CANDIDATE?

At minimum, candidates must fit Kareo's culture which means they must:

- Be Passionately Driven
- Constantly Fight for a Positive Culture
- Deliver Excellence
- Be Cool
- Expect and Embrace Change
- Make Room for Imagination
- Grow and Win

HOW DO WE HIRE INTO THE ENGINEERING ORGANIZATION?

We may hire into different levels if a staff engineer does not meet the minimum requirements in terms of experience and skill given the business need. Otherwise we will try and hire into the associate engineering position and develop from there.

HOW ARE PROMOTIONAL RESPONSIBILITIES GIVEN?

Promotions are given provided the following conditions apply: the opportunity is large enough to warrant the added responsibilities and the engineer consistently performs at a high level given the minimum criteria outlined in this document. This is especially true for positions beyond senior.

In some cases, the engineering organization may not have the available growth opportunity given the business climate. In such a case, we should celebrate someone leaving Kareo for a next level opportunity.

HOW DO WE DEVELOP PEOPLE?

Depending on their aptitude, managers will develop the engineer's strengths and weaknesses and provide appropriate stretch goals within the selected career track. However, developing people is not just about a formalized development plan. Culturally speaking, we strive to develop people by surrounding them with amazing peers and giving them challenging projects to stretch their skills. And finally, we strive for a culture of learning and honesty so we can help each other grow regardless of title or role.

WHAT IF I'M HAPPY WHERE I'M AT?

If the promotional responsibilities of a principal or manager doesn't suit your fancy, that's okay. We recognize that some people do not want that level responsibilities, however that does not mean we expect anything less than stellar performance.

COMPENSATION.

Finding amazing engineers is a hard enough task as it is so we strive to make sure that Kareo is positioned to attract the best talent by paying above market salaries for engineers. However, we recognize that markets change and we will review compensation annually and re-establish market compensation as necessary using existing company criteria.

Engineering Evaluation Criteria

In addition to the company values and behaviors, we've identified a set of criteria that engineering personnel, at minimum, need to exhibit to be eligible for the technical ladder.

TRUE NORTH

So despite all the technical skills they bring to the table this person knows how to get things done. They use good judgment to prioritize the "nice to have" from the "need to have" to deliver business success. They're a proven finisher with the ability to solve problems and deliver on time.

MULTIPLIER

This person is a team player with the ability to work collaboratively with other technical resources. They acknowledge the contribution of others with their own and is an inspiration and role model for those who work with them. They have the ability to optimize those around them to bring out their best.

THOUGHT LEADERSHIP

They're invested and involved not only in Kareo's technology and business but also what is going on in the overall world – both in business and technology. They recognize technological shifts in the larger world and push to keep Kareo headed in the right direction.

TECHNICAL APTITUDE

This person is the master of their domain; they display serious technical knowledge and have the expertise to provide solutions to complex technical problems. This person speaks computer languages, networks, and databases with equal fluency or has the capacity and desire to do so.

QUALITY OF SOLUTIONS

This person provides answers that not only solve problems, but are innovative and clean. They find ways to put in flexible solutions that withstand the test of time and adapt to technological changes. Their work is reliable and scalable, and improves the customer experience for Kareo users.

Engineering Track Progression

This matrix will serve as a set of necessary, but not sufficient, criteria that, if met, will help us judge the readiness of an individual to be given promotional responsibilities.

ASSOCIATE

Technical Aptitude – Demonstrates a basic understanding of object-oriented programming, algorithms, analysis, and data structures. The bubble sort algorithm is child's play to this person; knows that polymorphism is not some sort of disorder.

Quality of Solutions – Demonstrated ability to identify and resolve root causes given a focused software problem. Avoids algorithms that are $O(N^2)$.

Multiplier – Has the ability to work collaboratively with other technical resources with a “can do” attitude.

Thought Leadership – Identifies programming solutions that can be implemented to their project team's benefit.

True North – Conquers tasks on-time and within scope.

SOFTWARE

Technical Aptitude – Solid understanding of complex object oriented programming such as the difference between composition (aka aggregation) versus inheritance and examples of when to use one over the other.

Quality of Solutions – Demonstrated ability to identify and resolve root causes with a proven track record of translating real-world problems to elegant code solutions. Brittle, brute force code annoys this person.

Multiplier – Works collaboratively with other technical resources and their “can do” attitude is infectious.

Thought Leadership – Keeps an eye on the technology landscape and can identify and articulate key trends in the marketplace.

True North – Has a solid record of getting their software components across the finish line and into users' hands.

SENIOR

Technical Aptitude – This individual understands concepts such as inversion of control (aka the Hollywood principle), dependency injection, and knows why the “gang of four” are important.

Quality of Solutions – Demonstrated record of robust, scalable, and elegant solutions to engineering problems.

Multiplier – Works collaboratively with other technical resources; their “can do” starts to become undeniable.

Thought Leadership – Proven ability to identify technology trends and solutions with a track record of implementing them to their team’s benefit.

True North – Understands the balancing act between a robust, long lasting solution, and cranking something out fast to meet the needs of Kareo’s customers.

Technology Management

OVERVIEW

The role of the principal and senior principal engineer(s) will be primarily that of a technologist. They will be responsible for the research, design, and evolution of Kareo's growing technology stack. More specifically, principals will be responsible for the integrity and durability of a technology tier (or tiers) and own the technical aspects of its development from inception, release, and evolution. They will work with the engineering leadership team to strategically develop an actionable road map that aligns those technology choices with business need.

PRINCIPAL

Technical Aptitude – This individual can put together complex systems with their deep understanding of patterns, best practices, and architecture design skills.

Quality of Solutions – Shows the ability to solve technical problems that are clean, elegant, and innovative; often times reducing complexity and technical debt.

Multiplier – Ability to influence their immediate team and peers and enjoys mentoring other engineers in core aspects of their technology domain. Their “can do” attitude starts to become an epidemic.

Thought Leadership – Identifies technology trends happening in the marketplace and exploits them to the advantage of Kareo resulting in cost savings or increased revenue, or both. Reads and experiments with new technology because they want to not because it's their job.

True North – Solid track record of delivering technology projects that are robust, meet the scope of work, and most importantly, on schedule.

SR. PRINCIPAL

Technical Aptitude – Demonstrates the ability to solve cross-departmental issues and architect solutions. They have a deep understanding of operational and software development concepts including scalability and high availability strategies, performance gap analysis, and distributed systems design. Practices like BASE, CAP Theorem, and event and message driven programming come naturally.

Quality of Solutions – Drives performance and reliability from software and infrastructure at large scale.

Multiplier– Their “can do” epidemic has morphed into strong technical relationships within their team, department, and across departments.

Thought Leadership – Identifies key technology trends in the marketplace and deploys them to the advantage of Kareo resulting in large cost savings, significant revenue, or both.

True North – Owns end-to-end technical responsibilities for solutions implemented at Kareo.

Team Management

OVERVIEW

Engineering managers will represent the voice and advocacy of their respective teams to engineering and product leadership. They will be strategically responsible for aligning product, operational, and technology requirements into a cohesive and actionable plan. As a result they will be the engineering clearinghouse for the team and stakeholders. Tactically, they're able to see the entire project, anticipate outcomes, and pivot their project team for success.

EVALUATION CRITERIA

STRATEGY

Derives insight to craft a vision. Just as important, they can turn that vision into a road map.

DELIVERY

This person is a proven finisher. They know how to drive initiatives forward by aligning people and technology to get the job done. This often means taking a stand with incomplete information and amid diverse opinions to meet the needs of customers.

SOCIAL INTELLIGENCE

This person understands their strengths, weaknesses, and personal style and their impact on the relationships and performance of those around them. They are able to build decision networks, understand different perspectives, and navigate politics to cultivate relationships.

PEOPLE

This person recognizes that building great products starts with a great team and a great team is built on alignment and context rather than control. They also understand that learning comes in fits and spurts typically following failures.

Team management track progression

MANAGER

Strategy – This person searches beyond the boundaries of their team looking for patterns in multiple sources of data. They're able to interpret, learn, and adapt their team's road map as strategic data points change.

Delivery – They are continually re-evaluating and reframing project problems to ensure their team's delivery plan meets the needs of the customer. They avoid the "analysis-paralysis" loop despite having incomplete information.

Social Intelligence – They are recognized as a strong leader by both technical and non-technical people and serve as a focal point in the team for orchestrating technical solutions.

People – They not only expect excellence from themselves but from their direct reports. They provide constant guidance and feedback to bolster the abilities of individuals and properly set context to align direct reports with broader goals. They're able to empathize with others and de-escalate disagreements to promote cooperation and team building.

SENIOR MANAGER

Strategy – They are able to identify game changing opportunities at the periphery of the industry, use them to challenge prevailing assumptions, and test multiple hypotheses across more than one project.

Delivery – Proficient ability to reframe problems across multiple projects as well as synthesize, align, and effectively communicate goals across multiple initiatives based on changing strategies.

Social Intelligence – This person has built relationships that influence other divisions and technical groups in addition to product and technology operations. They serve as a focal point for multiple teams to orchestrate project solutions.

People – They not only expect excellence from themselves but from their direct reports. They provide constant guidance and feedback to bolster the abilities of individuals and properly set context to align direct reports with broader goals. They're able to empathize with others and de-escalate disagreements to promote cooperation and team building.