



# LEVELING UP: TEAM ACCOUNTABILITY AND TRANSPARENCY

(AKA COMPENSATION STATION)

## THE PURPOSE

The salary spreadsheet was introduced by XY Planning Network in 2018 to **provide transparency into how we make decisions about compensation**. We wanted to take away the stress of always feeling like you need to ask for a raise, only to be told “no” for reasons that make no sense to you or even your manager. We also wanted to show the various levels of accountability in the company, so you would know how your compensation relates to your level of accountability. This transparent pay scale allows us to talk about what level of accountability you want to take on, what the leadership feels you are ready to take on, and the compensation that is tied to that level of accountability.

[SEE THE SPREADSHEET](#)

## The 5 Levels of Delegation

### LEVEL 1 DO AS I SAY

This means do exactly what I have asked you to do. Don't deviate from my instructions. I have already researched the options and determined what I want you to do.

### LEVEL 2 RESEARCH AND REPORT

This means research the topic, gather information, and report what you discover. We will discuss it, and then I will make the decision and tell you what I want you to do.

### LEVEL 3 RESEARCH AND RECOMMEND

This means research the topic, outline the options, and bring your best recommendation. Give me the pros and cons of each option, then tell me what you think we should do. If I agree with your decision, I will authorize you to move forward.

### LEVEL 4 DECIDE AND INFORM

This means make a decision and then tell me what you did. I trust you to do the research, make the best decision you can, and then keep me in the loop. I don't want to be surprised by someone else.

### LEVEL 5 ACT INDEPENDENTLY

This means make whatever decision you think is best. No need to report back. I trust you completely. I know you will follow through. You have my full support.

OUR MANAGEMENT AND  
TECHNICIAN CAREER PATHS  
HAVE THE SAME COMPENSATION,  
ALLOWING TEAM MEMBERS TO  
DEVELOP AS EITHER PEOPLE  
MANAGERS, PROJECT MANAGERS,  
OR SUBJECT MATTER EXPERTS IN  
THEIR RELATED AREA OF PASSION  
AND EXPERTISE.

We have two career paths team members can take: **Manager and Technician**. We believe you should have career path opportunities that are outside of management as we don't want to incentivize management positions simply for more compensation. Our management and technician career paths have the same compensation, allowing team members to develop as either people managers, project managers, or subject matter experts in their related area of passion and expertise.

# THE LEVELS

## FIRST STOP: ACCOUNTABILITY

17  
EXECUTIVE / SUBJECT  
MATTER EXPERT

15-16  
MANAGING DIRECTOR / VP /  
SUBJECT MATTER EXPERT

11-14  
DIRECTOR -  
SENIOR DIRECTOR /  
SENIOR TECHNICIAN

7-10  
MANAGER -  
SENIOR MANAGER /  
TECHNICIAN

1-6  
ASSOCIATE / SPECIALIST -  
SENIOR ASSOCIATE /  
SENIOR SPECIALIST

### So what's the difference in levels of accountability?

#### EXECUTIVE

Of the 10 hills we could take, which one are we going to take on next?

Executives figure out the right objectives to focus on.

#### DIRECTOR

The Executive said take that hill. How do we do that?

Directors create a plan to achieve an objective.

#### MANAGER

The Director gave me a plan for taking that hill. How do I align my team to do so?

Managers marshal their team resources to execute a plan to achieve an objective.

#### SPECIALIST

I'm going to follow my manager up that hill!

Specialists execute on the manager's plan.

**NOTE:** Some specific roles have their own pay scale based on market rate for experience and talent in that specific role. These typically overlay Levels 1-6, then move into specialized technician tracks with compensation tied to accountability.

At XYPN, this includes:

- CPAs/Accountants
- Bookkeepers
- Developers
- Teachers
- Coaches and Consultants



**EXECUTIVE** SETS THE DESTINATION

Asks the question, “Strategically, should we offer a Virtual Assistant platform or outsourced IT to our members?” Evaluates marketing opportunity, creates revenue models, maps initial cost structure, sets profit targets, and evaluates strategic business opportunities.



**DIRECTOR** MAPS OUT THE ROUTE

Is told “We picked VA service.” Creates a tactical plan to answer the question “How will we stand up the VA service?” This includes creating a hiring plan, deciding on systems infrastructure, sales & marketing communications, pricing levels to achieve profit targets, for the service to be executed.

**Managing Director**

Can complete this with autonomy from Executive.  
Mostly at the Act Independently/Autonomous Level.

**Senior Director**

Can complete this in collaboration with Executive.  
Mostly at the Decide and Inform level.

**Director**

Can complete with ongoing guidance from Executive.  
Mostly at the Research & Recommend level.



**MANAGER** CONDUCTS THE TEAM

Manages the team of VA’s delivering the service. Hires, trains, develops, and executes the Director’s plan.

**Senior Manager**

Can complete this in collaboration with Director.  
Mostly at the Decide and Inform level.

**Manager**

Can complete with ongoing guidance from Director.  
Mostly at the Research & Recommend level.



**SPECIALIST** IMPLEMENTS THE PLAN

Executes on the manager’s plan.

# HOW PROMOTIONS HAPPEN

## GETTING TO THE NEXT LEVEL

1-6  
ASSOCIATE / SPECIALIST -  
SENIOR ASSOCIATE /  
SENIOR SPECIALIST

7-10  
MANAGER -  
SENIOR MANAGER /  
TECHNICIAN

11-14  
DIRECTOR -  
SENIOR DIRECTOR /  
SENIOR TECHNICIAN

15-16  
MANAGING DIRECTOR / VP /  
SUBJECT MATTER EXPERT

17  
EXECUTIVE / SUBJECT  
MATTER EXPERT

### LEVELS 1 - 6

Team members move from Level 1 to Level 6 **automatically based on time in service**. These are “up or out” promotions meaning that managers do not approve or request these, they simply happen. If a manager doesn't feel comfortable with one of their direct reports making \$143/month more after 1 year with the company, then we clearly have a “Right Person Right Seat” issue that needs to be addressed. Managers do not have the ability to request that the automatic promotion be delayed or canceled. If they would want to do so, we need to transition the team member to a different seat or out of the company.

### THE MOVE TO LEVEL 7

Moving into a Manager level role is a **promotion that will happen whenever accountabilities change** and the team member is taking on that level of accountabilities. This can happen at any time in a person's tenure with our company. A team member might spend five years moving from Level 1 – Level 6, while another gets promoted to Level 7 two years after they join the team. This is based on the accountability of being a manager, not time in service.

### THE MOVE TO LEVEL 9 **MANAGER > SENIOR MANAGER**

This move is **automatic based on time in service**. To make this move, we would expect that you have successfully managed a project to completion or developed a team to the point that at least one person has been tapped for a new role in the organization. Completion of this target does not move you from Manager to Senior Manager automatically but is a must have to move to Senior Manager at your time in service mark.

### THE MOVE TO LEVEL 11 OR 13 **DIRECTOR > SENIOR DIRECTOR**

Moving to a Director or Senior Director level role is a **promotion that is based on accountabilities** a team member is accepting, and the compensation will match that. Time in service does not make someone eligible to move from Senior Manager to Director, Director to Senior Director, or Senior Director to Managing Director.

### INTRA LEVELS

Levels 8, 10, 12, 14, 16 are all **time in service promotions**. Once you have spent the allotted time at a level, you are automatically promoted to the next level up.

### MOVING DOWN IN ACCOUNTABILITY

There will be times where a team member applies for a new role within the organization that is at a lower level of accountability than where they are today. A manager might also recommend the move to a seat that is better suited for the team members skill set that is a lower level of accountability. Because compensation matches accountability, compensation will be adjusted downwards to the level of accountability the team member is accepting.

**Peers will not always have the same level of accountability.** You will be in L10 meetings with your manager and their direct reports according to the company-wide accountability chart. You might be a Manager Level that reports to the Executive Level, with a mix of Senior Managers, Directors, and Senior Directors in your L10. This is normal, and to be expected. Your path to moving up in accountability is individual *to you*, and not based on where other team members are in their own paths.

**Your journey will be unique, and it is up to you to advocate for higher levels of accountability** (if you want them), working with your manager to understand what it takes to earn their trust to take on those higher levels of accountability, and to look for other positions that might allow you to do so if your current role doesn't provide a career path that satisfies your long-term personal and career goals.

**PEERS WILL NOT ALWAYS  
HAVE THE SAME LEVEL OF  
ACCOUNTABILITY... YOUR PATH TO  
MOVING UP IN ACCOUNTABILITY  
IS AN INDIVIDUAL PATH.**

## TITLE DEFINITIONS

### EDUCATOR

Provide our members education in a group format on an area of subject matter expertise.

### COACH

Provides paid services to members. Work done with members is generally an ongoing relationship.

### CONSULTANT

Provides paid services to members. Work done with members generally has an end date. Note the difference in definition between Coach and Consultant is not highly relevant and you may oscillate between the two.

## EDUCATOR

The educator track mirrors the Specialist to Manager track for the rest of the company. **This is a specialized position that is focused on building subject matter expertise to provide education to our members.** This is a path to becoming a coach/consultant, but it is not mandatory.

## COACH/CONSULTANT

**These provide paid services to members and generate revenue.** To move up the pay scale as a Coach/Consultant, you will become accountable for providing more hours of paid services to members. As you take on more paid services, the time you spend providing education to members will decrease. It is estimated that at/near capacity, you will be providing 850 hours/year of paid services, and approximately 850 hours of education to members. If you are at level 11, you would be providing 367 hours/year of coaching and 1,333 hours of education. Taking on more coaching/consulting hours is done with management approval to ensure we have adequate education hours being provided.

[SEE THE SPREADSHEET](#)