

Association Leadership Guide:

Certification Development Checklist



Have a certification development project in your future? As part of your project plan, use this checklist to define important steps in your path and determine your resource capabilities.

**We Can
Do This** **We Need
Help**

Certification Development Steps

► Build a Foundation of Relevant Content

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| ☐ | ☐ | Conduct a market needs analysis to evaluate market and labor trends, competition, and growth opportunities. Use results to determine the certification's target audience. |
| ☐ | ☐ | Conduct a job task analysis, repeatable every three to five years. |
| ☐ | ☐ | Build or update a body of knowledge to guide the certification program. |
| ☐ | ☐ | Assemble an exam development committee consisting of subject matter experts and at least one psychometrician to lead the question development, exam publication, and scoring processes. |

► Define the Certification Rules & Logistics

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| ☐ | ☐ | Determine an exam delivery strategy, using testing centers, remote testing, or embedded exams. Contract with provider, as necessary. |
| ☐ | ☐ | Create a certification pricing strategy that maximizes adoption and delivers the required revenue stream. |
| ☐ | ☐ | Establish the guiding principles and rules of your certification program. Draft a certification handbook. |

► Develop Certification Preparation Resources

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| ☐ | ☐ | Determine the resource requirements for initial development, implementation, ongoing support, and updates. |
| ☐ | ☐ | Create an adaptive online exam preparation program that guides candidates through their studies. Develop printed books for offline study, including a printing and distribution strategy. |
| ☐ | ☐ | Create an enterprise competency and knowledge assessment to help employers determine the need for internal training and certification. |
| ☐ | ☐ | Assemble and train a sales team to support training and enterprise partners. |

► Build Certification Awareness and Demand

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| ☐ | ☐ | Create a marketing plan, messaging, and communications tools to build awareness, generate leads, drive demand, and support candidates throughout their certification journey. Include templates to share with training partners. |
| ☐ | ☐ | Source or update your existing online candidate management system for certification and exam applications, document uploads, approvals, support, and recertification. |
| ☐ | ☐ | Establish an e-commerce system to collect payments for applications, exam preparation resources, and renewals. Include a payment plan option. |
| ☐ | ☐ | Train customer service representatives to support certification and exam preparation programs. |
| ☐ | ☐ | Launch your program with fanfare, preferably at a conference or live event. |

► Monitor, Improve and Grow

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| ☐ | ☐ | Establish, manage, and grow partnerships with colleges, universities, industry groups, international training organizations, and consultants to deliver local training. |
| ☐ | ☐ | Collect, monitor, analyze, and use data to evaluate strategies and improve programs. |
| ☐ | ☐ | Utilize certification data to create lifelong career pathways and recommended development resources for members. |

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