



# *Shaping the Future* of Assessment

## **Expanding Your Credentialing Testing Program to International Markets- Is it for the Mission, Money, or Both?**

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# Overview

- Purpose
- Background of Organizations
- Brief Description of Credentials
- International Presence
- Key Areas of Consideration
- General Discussion
- Concluding Thoughts

# Purpose of the Presentation

- Introduce our organizations
- Briefly discuss key factors in considering international expansion
  - Aligned to mission, money, or both?
- Present international expansion experiences from these perspectives:
  - Freshman (GBCI)
  - Junior (PMI)
  - Senior (Microsoft)

# Our Organizations: GBCI

- Assess professionals and certify buildings based on green building and sustainability standards, practices, and concepts (LEED)
- GBCI's mission is to be the premier organization independently recognizing excellence in green building performance and practice globally

# Our Organizations: GBCI

- Our Credentials



# Our Organizations: GBCI

- **Credentialing program began in 2001**
- **Total Credentialed Holders**
  - As of January 2011 around 149,120
- **International**
  - Total (and by percent) non-US credential holders?
    - 9,132 (6.1%)
  - Top 5 non-US countries of most credentialed holders?
    1. Canada (2.43%)
    2. UAE (0.54%)
    3. China (0.40%)
    4. Hong Kong (0.37%)
    5. UK (0.27%)
  - **International Efforts**
    - Canada & France; Future possibilities Spanish Speaking, Middle East, and China

# Our Organizations: PMI

- **Core Purpose:** To advance the practice, science and profession of project management throughout the world in a conscious and proactive manner
- **Envisioned Goal:** Worldwide, organizations will embrace, value, and utilize project management and attribute their success to it
- **Centered** around core offerings of Standards, Certification, Communities, Training/Education, and Research



# Our Organizations: PMI

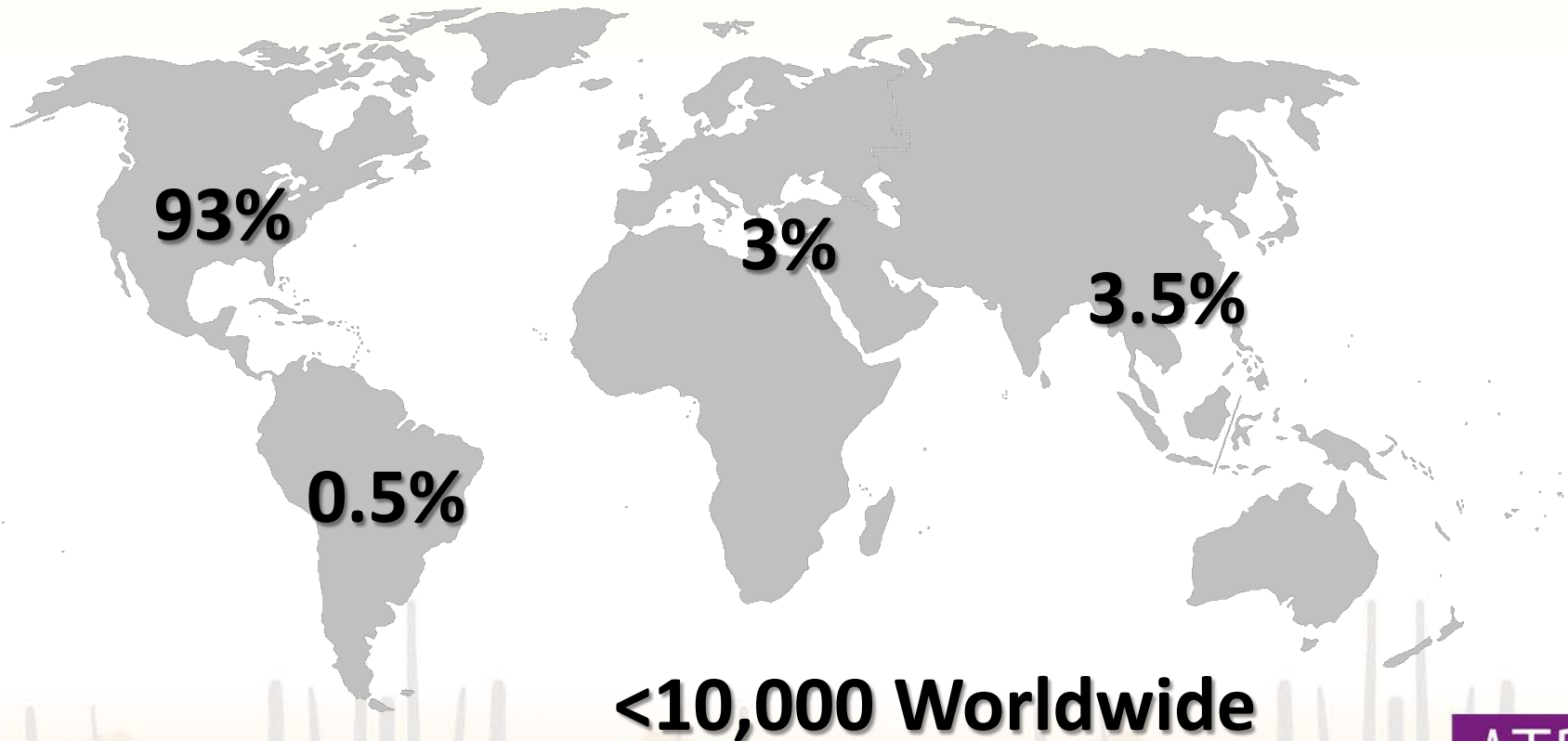
- Five certification products, including PMP – started in 1984





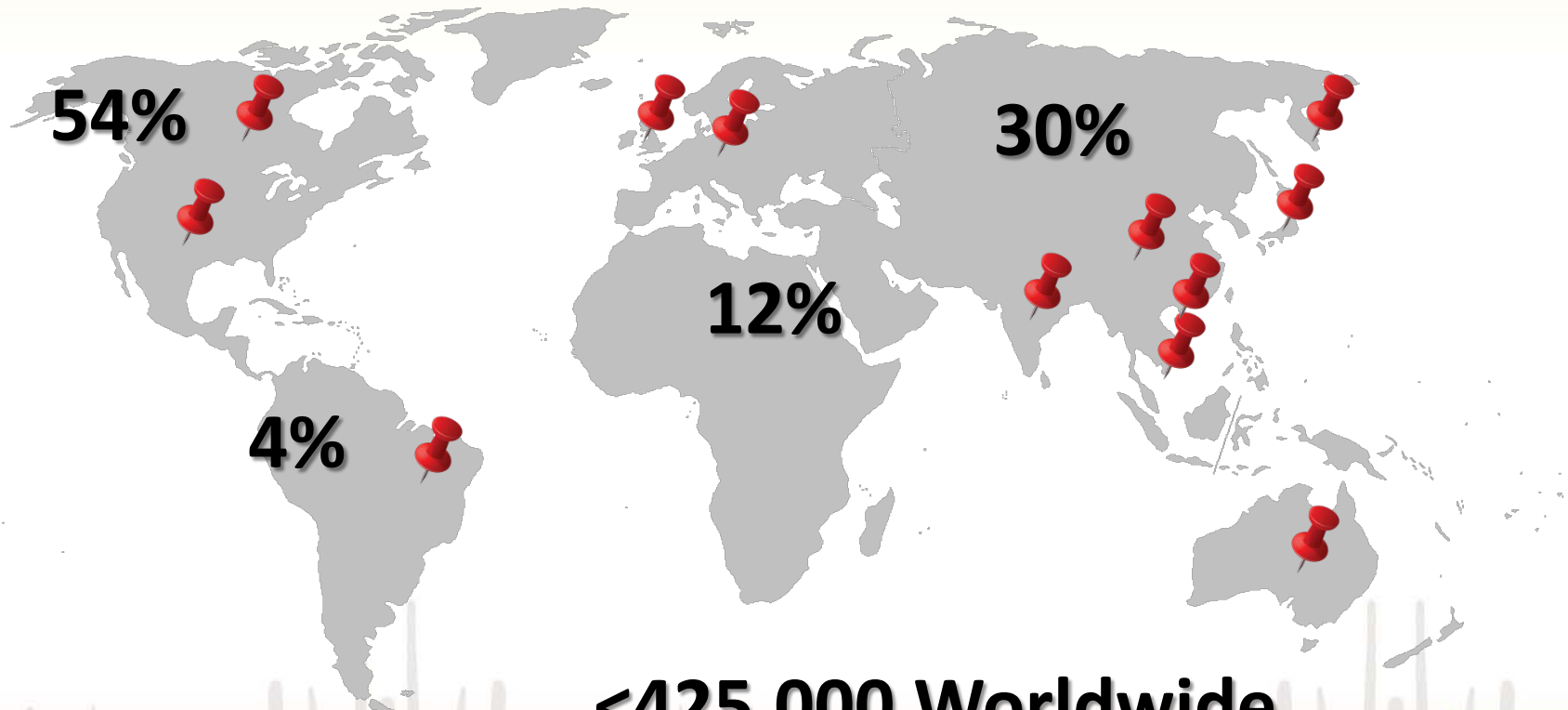
# Our Organizations: PMI

- PMI credential holders in 1997:



# Our Organizations: PMI

- PMI credential holders in 2011:



**<425,000 Worldwide  
180+ countries**

# Our Organizations: PMI

- PMI's regional offices and representative staff:



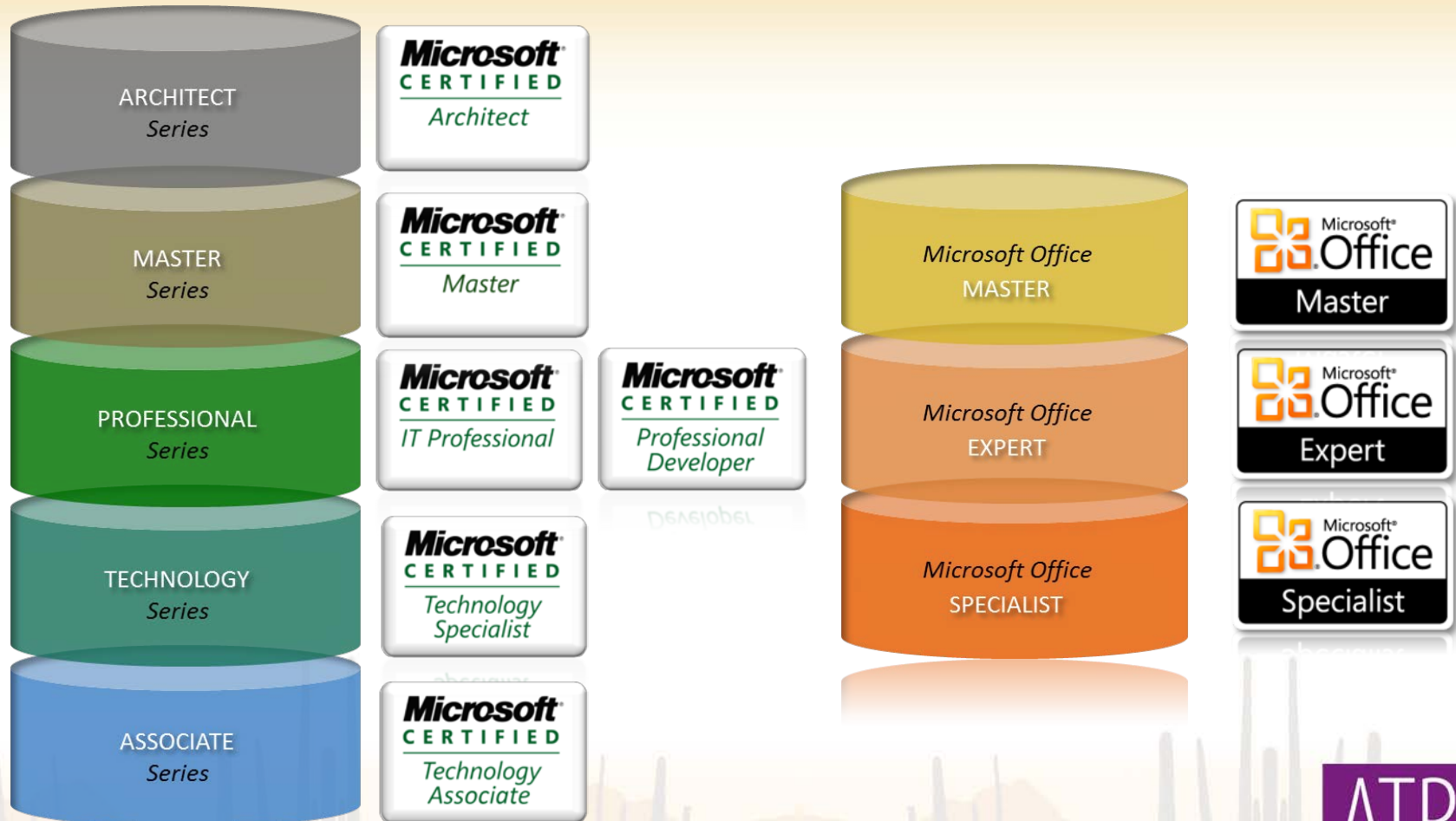
# Our Organizations: Microsoft Certification

- **Purpose:** Accelerate adoption and optimize deployment by maximizing the Microsoft skills advantage
- **Value:**
  - Microsoft Certification
    - recognizes and validates real-world IT skills
    - supports the certified community by providing access to unique resources
    - offers a life-long career path of IT skills development

# Our Organizations: Microsoft Certification

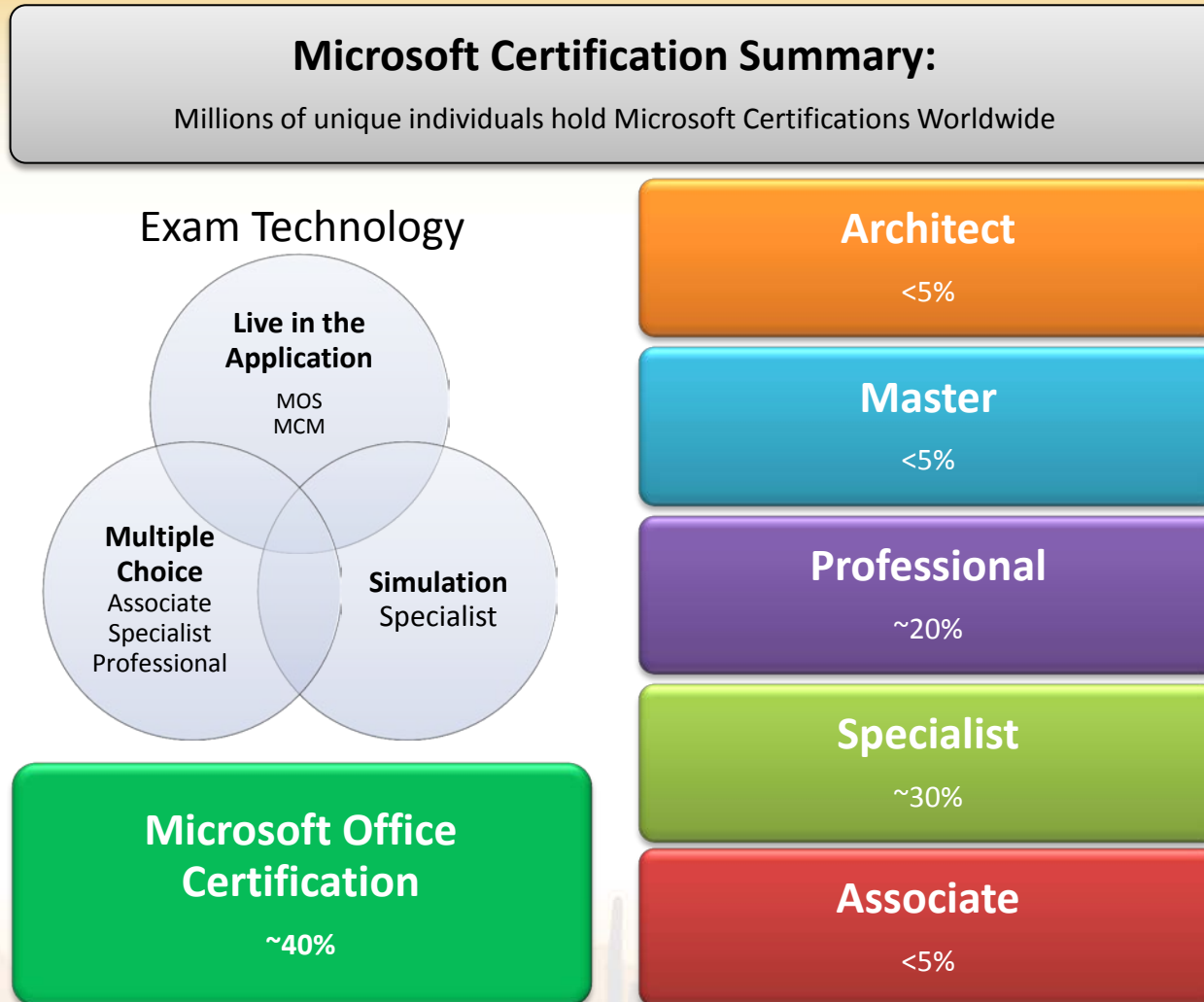
- Microsoft Learning offers eight credentials across four programs
- Candidates can earn certifications on more than 20 Microsoft Technologies
- Microsoft Learning has more than 100 unique exams in the market
- Microsoft Learning localizes in 21 languages and has ~1000 exams in market including localized versions

# Microsoft Certification Family



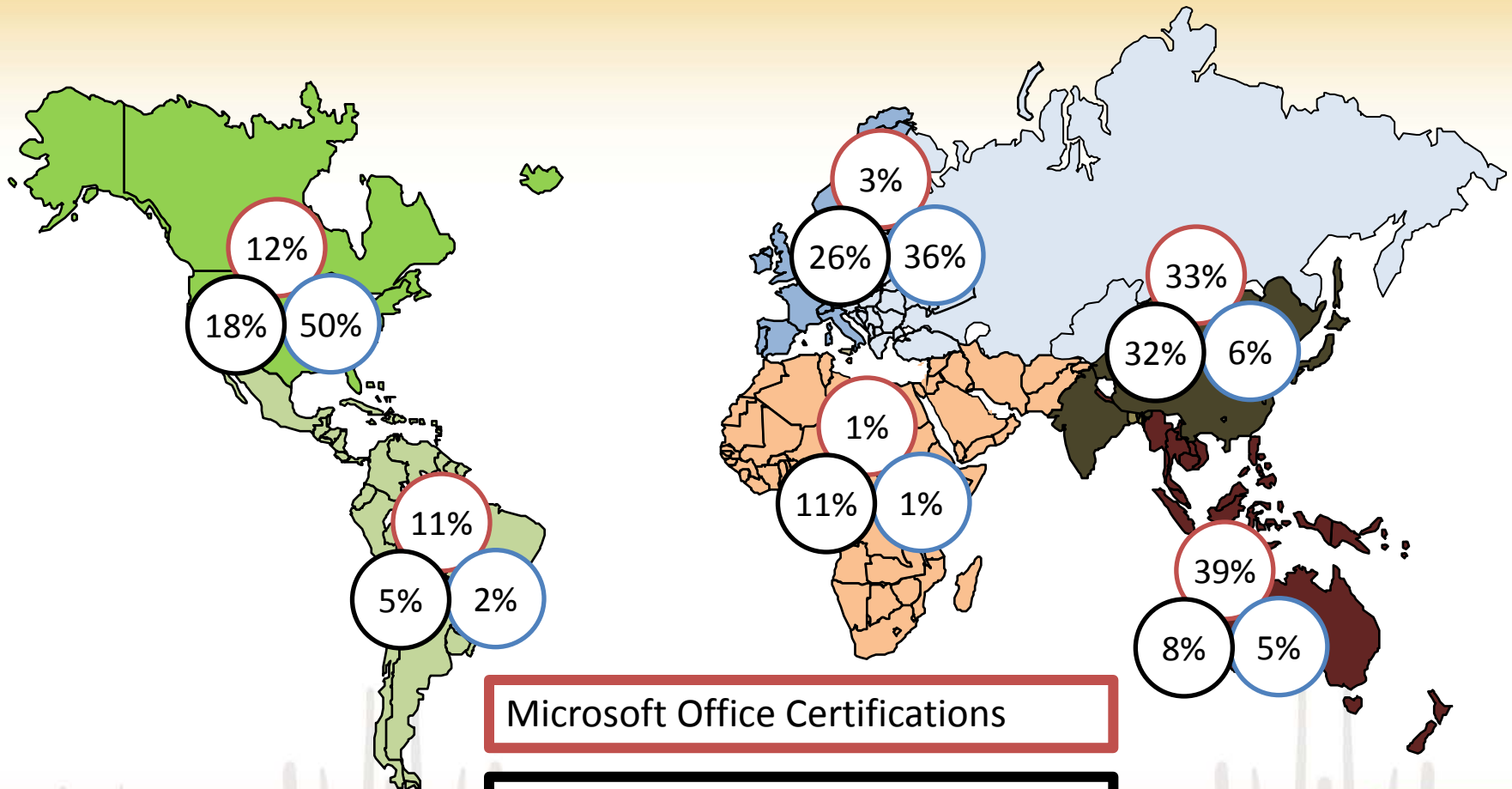


# Microsoft Certification: By Program





# Microsoft Certifications



Microsoft Office Certifications

Microsoft Technical Certifications

Microsoft Advanced Certifications

# GBCI: Beginning in International Expansion

- Deliver exams in many countries via Prometric test sites in English
- Decision to translate in other languages
  - French Expansion was mission and chapter driven
- Where should we go next that is aligned with revenue generation while aligned with mission
  - China, Middle East, Spanish Speaking Countries are possibly next

# PMI: Making Gains in International Expansion

Make exams  
available  
worldwide via  
Prometric

Growth through  
local chapters and  
communities

Regional Business  
Plans and  
Representative  
Offices

# PMI: Making Gains in International Expansion

- **Mission or Money: Both**
  - Core purpose / envisioned goal both reflect international focus
  - Project management is a new profession:
    - Needed global advocate
    - Non-regulatory, so needed a benchmark for professionals worldwide
    - PMI matured in the age of globalization
    - PMI matured parallel with IT, a key industry, with its portable tasks/activities
  - Largest growth areas are International
    - Majority of credential holders are now international

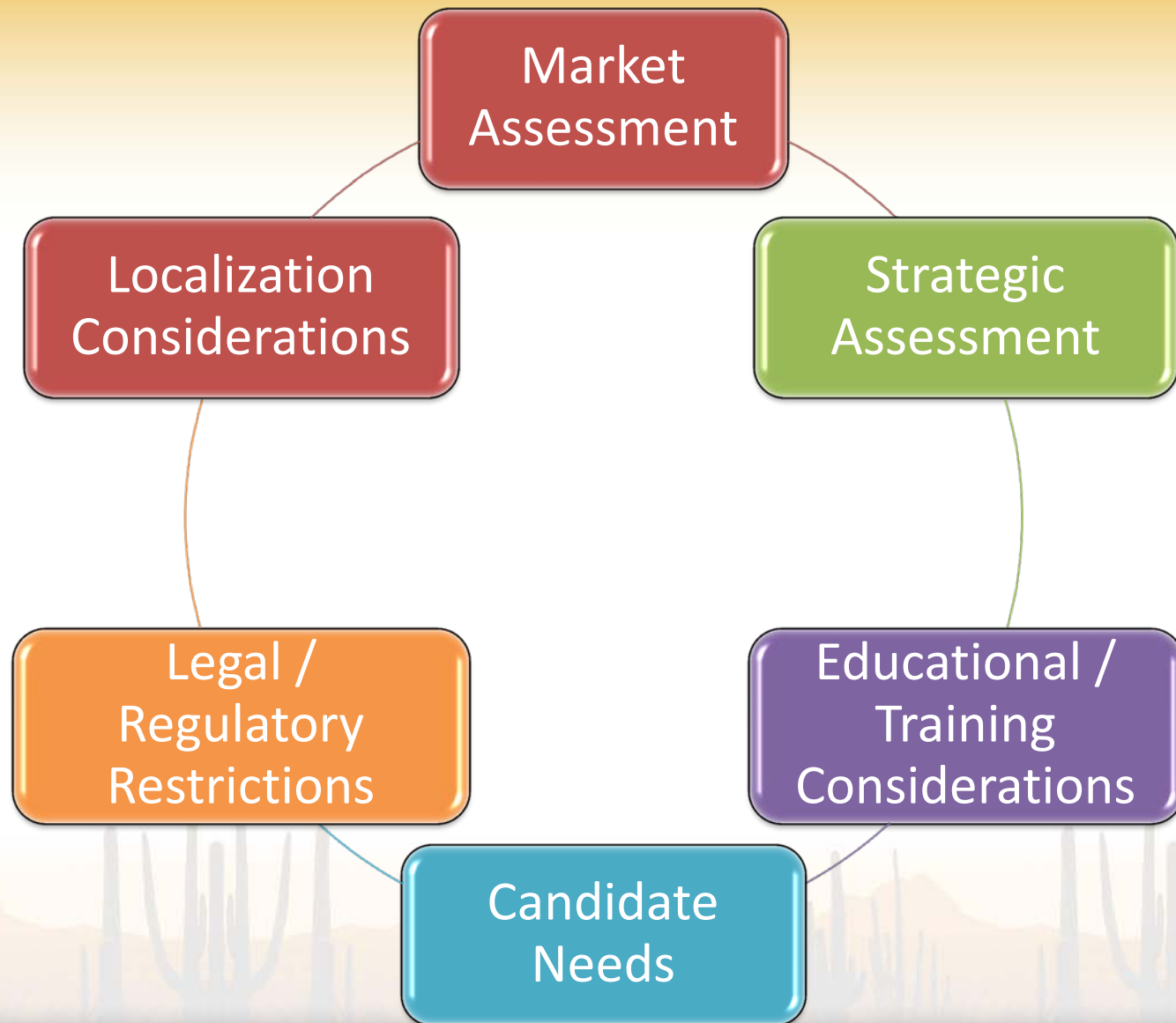
# Microsoft: Established in the Global Market

- **Mission or Money: It's a balancing act**
  - Microsoft certification strategy needs to support customers, partners, and Microsoft
    - Maintain breadth of core programs
      - Core products localized in 10 languages
    - Grow emerging programs
      - MTA, MCM, MCA
    - Align to Microsoft strategy with strategic investments
      - Windows Mobile 7
    - Focus on integrity across all programs
      - Security, content quality, localization

# What should you consider?

- Is there a viable market?
- How would this expansion align to your mission, vision, values, strategic plan, etc.?
- Will this expansion make revenue / profit?
- What are the challenges / risks to this expansion?
- What are the associated benefits (indirect benefits) of expansion?

# Key Areas of Consideration





# Discussion

- There has been a tremendous amount of research devoted to the “psychometrics” of cross-cultural assessment
- Best practices have been proposed (e.g.: ITC guidelines) for test translation, adaptation and other (largely psychometric) activities that are necessary for the successful implementation of testing programs internationally
- Research on test translation/adaptation and analytic methods is commonplace
- Cross-cultural psychology frameworks also useful in guiding activities

# Discussion

- **A sample cross-cultural psychology framework:**
  - **Hui & Triandis (1985)**
    - **Conceptual equivalence**
      - Is the construct meaningful in both cultures?
        - » e.g.: Individual rights?
    - **Construct operationalization equivalence**
      - Is the construct operationalized with the same behaviors?
        - » Aggression?
    - **Item equivalence**
      - Can the construct be measured using the same items in both cultures?
    - **Scalar equivalence**
      - Can the construct be measured on the same metric in both cultures?
        - » Does a '3' refer to the same level of aggression in cultures 'A' and 'B'?

# Discussion

- Considerably less thought has been devoted to the importance of non-psychometric issues when implementing testing programs internationally
- This session provided very valuable insight into some of the issues that GBCI, PMI and Microsoft are addressing as they expand programs abroad with their differentiated level of experiences
- *What lessons can we learn from the fields of international management and business?*

# Discussion

- **What international business models might we consider adopting when expanding our testing programs abroad?**
  1. Independent agents
  2. Joint ventures
  3. Direct Acquisitions
  4. Sequential market entry (“foot in the door” approach)

# Discussion

- **3 approaches to international management**
  - Ethnocentric management
  - Polycentric management
  - Geocentric management
- **When attempting to expand our credentialing testing program abroad, we need to know:**
  - Business aspects of countries of interest
  - Socio-political traits of countries of interest
  - Socio-cultural traits of countries of interest

# Concluding Thoughts

- Based on some of the considerations what are your organizations reasons for expanding your credentials?





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## **Expanding Your Credentialing Testing Program to International Markets- Is it for the Mission, Money, or Both?**

### **Presentation Handout**

# Expanding Your Credentialing Testing Program to International Markets-

## Is it for the Mission, Money, or Both?

- **Market assessment**
  - Historical, current, and forecasted economic trends
  - Demographics
  - Firmographics (e.g., industry mix)
  - Competitive analysis
  - Value of certification
  - Local culture
- **Strategic Assessment**
  - Organization's mission, vision, and values
    - Strategic plan
  - Ethical considerations
  - Existing competitive threats
- **Educational / Training Considerations**
  - Education channels
    - Local organizations? Corporate developed? Outsourced?
    - Localization considerations
  - Education / training is a critical, and often overlooked, aspect of certification
- **Candidate Needs**
  - Testing situation: PBT, CBT, IBT? Test center penetration?
  - Examination information and materials (e.g., handbooks)
  - Payment methods
  - Accessibility
  - Technological capabilities
- **Legal / Regulatory Restrictions:**
  - Legal mandates
  - Copyright / Trademark / IP Law
  - Accessibility / Disability Laws
  - Fairness / Equity
  - Restrictions on U.S.-based businesses on certain countries
- **Localization Considerations**
  - Translation of:
    - Communications
      - Exam
      - Publications
  - Recertification (if applicable)
  - Communications channels

# Expanding Your Credentialing Testing Program to International Markets- Is it for the Mission, Money, or Both?

**What international business models might we consider adopting when expanding our testing programs abroad?**

## 1. Independent agents

- Our experts contact local (foreign) residents to represent our organization in another country
- A local operator agrees to conduct business according to prescribed methodologies and marketing plans using the company's name
- Franchisee typically pays royalties but maintains relative autonomy in conducting day-to-day business
- Test delivery center model

### **Pros:**

- Cheap way of entering an international market
- Brand name recognition

### **Cons:**

- Lose some control over day-to-day operations
- Can tarnish overall brand image

## 2. Joint ventures

- Two businesses (one local and one in the host country) form a partnership to do business in the targeted country

### **Pros:**

- Leads to a more cautious entry into the international market
- Local partner can ensure that local customs, laws, business practices are respected in day-to-day operations
- More control over daily operations

### **Cons:**

- Have to deal with a partner
- Partner can subsequently become a direct competitor!

# Expanding Your Credentialing Testing Program to International Markets- Is it for the Mission, Money, or Both?

**What international business models might we consider adopting when expanding our testing programs abroad?**

## 3. Direct acquisitions

- Buy part or all of a foreign company (competitor)
- Firm can operate as a somewhat autonomous entity or be more tightly controlled as a subsidiary, for example

### **Pros:**

- Experienced business partner is on-site in the international market
- Affords the most control over daily operations

### **Cons:**

- Expensive
- Will inherit past headaches!

## 4. Sequential market entry (“foot in the door” approach)

- Start by establishing “niche” services and/or products and slowly diversify as brand recognition increases
- e.g.: Start by offering educational consulting services on a small-scale. Once reputation solidifies, start marketing actual products (exams)

### **Pros:**

- Lower risk
- Stealth method by which to enter target market

### **Con:**

- Slower market entry

# Expanding Your Credentialing Testing Program to International Markets- Is it for the Mission, Money, or Both?

## 3 approaches to international management

- **Ethnocentric management**
  - “Headquarter” management style and practices employed abroad
  - Can lead to catastrophic mistakes due to cultural differences!
  - What works at home may not work abroad
- **Polycentric management**
  - Staff workforce with as many local experts
  - Local professionals are best suited to know the local culture, language and work ethic
  - May not work well in under-developed countries where workers may not possess the necessary management skills and acumen
- **Geocentric management**
  - Business problems are the same all over the world
  - Best managers, regardless of national origin, should be involved
  - Both local and global ramifications need to be understood

When attempting to expand our credentialing testing program abroad, we need to know:

- **Business aspects of countries of interest**
  - Infrastructures
  - Business practices
  - Foreign trade dynamics
- **Socio-political traits of countries of interest**
  - What are the political risks inherent in given countries?
- **Socio-cultural traits of countries of interest**
  - How are power structures perceived in other cultures?
  - How do certain cultures deal with uncertainty?
  - Individualism - collectivism?
  - Emphasis on traditional “male” – “female” values?
    - Assertiveness, competitiveness, material success
    - Cooperation, passivity, etc.