



# Certification

WHY? WHEN? HOW?

Presentation for real client to create a Martech University



# contents

01

The Why

02

Types

03

Assets

04

Content Audit

05

Homework

06

Next steps

# contents

01

The Why

02

Types

03

Assets

04

Content Audit

05

Homework

06

Next steps

Why do we need certification?

# Why



## Standardization

- Minimal knowledge for role, skill, department
- Movement across roles, modules
- Employee Onboarding plan: Minimal new workflow, feature knowledge

## Branding

- Brand the domain
- Element of pride in [Software] knowledge
- Lead-generation tool
- Position as thought-leader/shape the narrative
- Cultivate an engaged community

## Ecosphere development

- Partner development
- Future monetizing on training / cost reduction by standardized training

# contents

01

The Why

02

Types

03

Assets

04

Content Audit

05

Homework

06

Next steps

What types of certification exist

# Certification Types

---



## Quick Assessment/Quizzes

- Exam objective
- High quality question bank
- Module wise question
- Above threshold performance gives the certificate

## Courseware + Exam

- Exam objectives
- Student, teacher, partner learning kit
- Preassessment
- Test and follow-up (LMS integration)

## Academy/University

- Multiple tracks, each track with different modules
- Dedicated teams
- Multiple use cases
- Paid + free training
- Paid + free exam
- Complimentary training seats for partners, customers

## Example Objective

---

Promote Omnichannel marketing by standardizing [Software] offering. We want to deliver **1 trillion dollar** of additional revenue for our partners in the **next decade** and will train and certify **100k software newbies and veterans** as full stack customer engagement/retention marketing professionals to aid this additional growth.



# contents

01

The Why

02

Types

03

Process

04

Content Audit

05

Homework

06

Next steps

Define the curriculum development process

# Making of Curriculum

- 1. Exam Objective
- 2. Goals/Scope
- 3. Analysis: User/Tasks
- 4. Content Outline
- 5. Key Content
- 6.. Visualization/ Videos



- 7. Question Bank
- 8. Review/Test/Beta
- 9. Publish to LMS
- 10. Announce/Publicize
- 11. Reward/Motivation
- framework
- 12. Maintain/Scale



# contents

01

The Why

02

Types

03

Process

04

Content Audit

05

Homework

06

Next steps

Identify Content Availability / Gap



The most important thing is  
to understand what we have  
and what's the gap to what  
we want to have!

GO2WORDS

# What external stakeholders need?

## Partners

Partner onboarding/certification, employee certification, popular case studies, industry speak, updates, prerelease, partner community, developer portal

## Customer

Software integration, their use case to feature mapping, common How Tos, FAQs, troubleshooting help, solution engineering, forums, employee knowledge upgrade/certification

## Future employees

Reasons for great career, learning opportunities, sandbox, developer content, tutorial, forums, **certifications**, communities

## Press/Influencers

Social media updates, blogs, executive blogs, conference/event invites, newsletters/push notifications, press release, insider news

# What internal department needs?

## Marketing

Feature reasons/positioning, workflow summaries, user testimonials, industry speak, vertical/horizontal case studies, social outreach, campaigns

## Customer Success

New employee training/certification, top issues and fixes, what's new, migration, troubleshooting help. Case difficulty assessment, new release training, KM on corner case studies

## Engineering/PDM

Feature testing, feature positioning, workflow test cases, problems and solutions, what's new, developer sandbox, API, rest endpoints

## Hiring /Skill Development

Knowledge frameworks, hiring check sheet, minimal knowledge assessment, intra-role movement, career paths

# Audit - These Deliverables

## Marketing

Branding, case studies, success story, evangelism (videos, podcasts), communities, sales kits, badges, white papers, conference, social strategy, campaigns, glossary, micro websites

## Customer Success

Enterprise onboarding, IT help, developer help, troubleshooting, FAQs, error message help, feature/version unique situations,

## Partners/Users

Onboarding guides, Using guide, developer guides, tutorials, videos, best practices, blogs, forums, event invites, social media posts, forums

## Engineering/PDM

Release notes, known issues, blogs, best practices, working tutorials, workflows, REST APIs parameters, function-API-task lookup table, keyword-feature mining, forums, conference presentations

# contents

01

The Why

02

Types

03

Process

04

Content Audit

05

Homework

06

Next steps

Define Certification Goals, Best Practices, and Use Cases

## Reality Check

---

### Assessing the internal readiness

- Goal versus Content availability difference
- Corporate view versus individual department views
- Internal "standardization" rallying to external manifestation



# Get The Story Right

*from a first party perspective*

## Marketing



Goals  
Objectives  
Use Cases

## Engineering / PDM



Modules, Tools, APIs, Best  
practices, new features  
mapping, Term Bank

## Customer Success



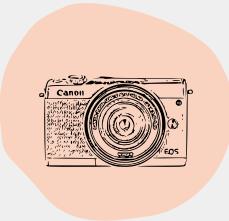
Tips, issues, pain points,  
onboarding paths

# *Roles For* Certification Program



## Content

Instructional Designer  
Tech writer  
Programmer Writer  
Subject Matter Experts



## Rich text

Visual Designer  
Videographer  
Voice over?



## Delivery

LMS Integration  
Program Manager  
Trainers / Evangelists

*For planning skills/people*

# contents

01

The Why

02

Types

03

Process

04

Content Audit

05

Homework

06

Next steps

Typical Scenarios

how

## Start small

3-4 months

- Exam objective
- Basic learning guide (curated + minimal new highest quality)
- Few certifications - high quality quizzes
- Success celebration (pride)
- Fail Support (guided path to success)

## Grow

3-9 months

- Set all module certifications
- Supporting knowledge for students, trainers
- Progress tracks to aid student success
- Limited community for celebration/support

## Scale

6-24 months and beyond

- Free + Paid exam
- Paid and yet free
- Trainings (virtual/physical)
- Multiple Courseware
- Community (QA, extended blogs)
- Certification tracks

## MVP

- Website - Sell the why, gains for employees, partners, software professionals
- Learning path: Domain to product
- Top 20 use cases
- Start free then go premium

## Strategic engagement

- Long-term relationship with those who pass certification
- Marketing: Engaged community and brand share and referrals, positioning in Gartner Magic Quadrant
- Partner success - faster developer onboarding, and first use case success
- Product success: Use case extension and feature prioritizing
- Reduced cost of support -> Train on common call scenarios