Implementing a Robust Credential Management Solution

When, What, And How?

Three Questions

- When does your program need a credential management solution?

- What requirements are important for your program when evaluating a credential management solution?

- How can you prepare and contribute to a smooth implementation of a credential management solution?
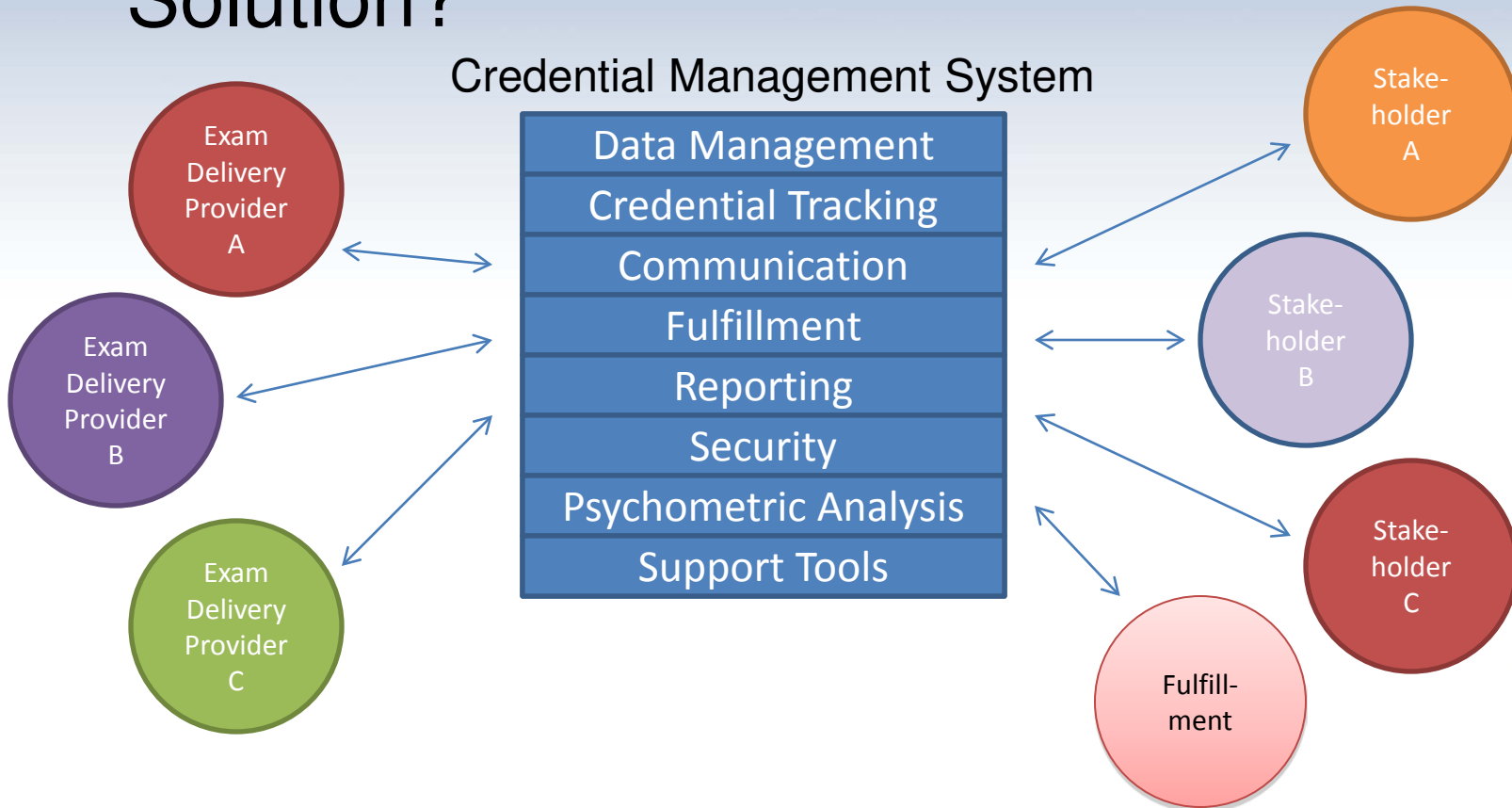
Agenda

- Handout
- Overview – Blair Harris of Alpine
- When – Joe Cannata of Brocade
- What - Jill Burroughs of CompTIA
- How - Maurilio Gorito of Riverbed
- Questions

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Overview

- ## What is a Credential Management Solution?

Credential Management System

| Data Management |
| Credential Tracking |
| Communication |
| Fulfillment |
| Reporting |
| Security |
| Psychometric Analysis |
| Support Tools |

Exam Delivery Provider A

Exam Delivery Provider B

Exam Delivery Provider C

Stake-holder A

Stake-holder B

Stake-holder C

Fulfill-ment

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Stakeholders

- Who are the different stakeholders in a Credential Management Solution?
  - Testing Publishing Organization
  - Certification Program
  - Candidates
  - Partner and Education Programs
  - Regulatory Bodies
  - Other

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When?

Our Story

- Back in 2000 we began our Certification Program
    - We started with one certification
    - Uptake was slow, as expected
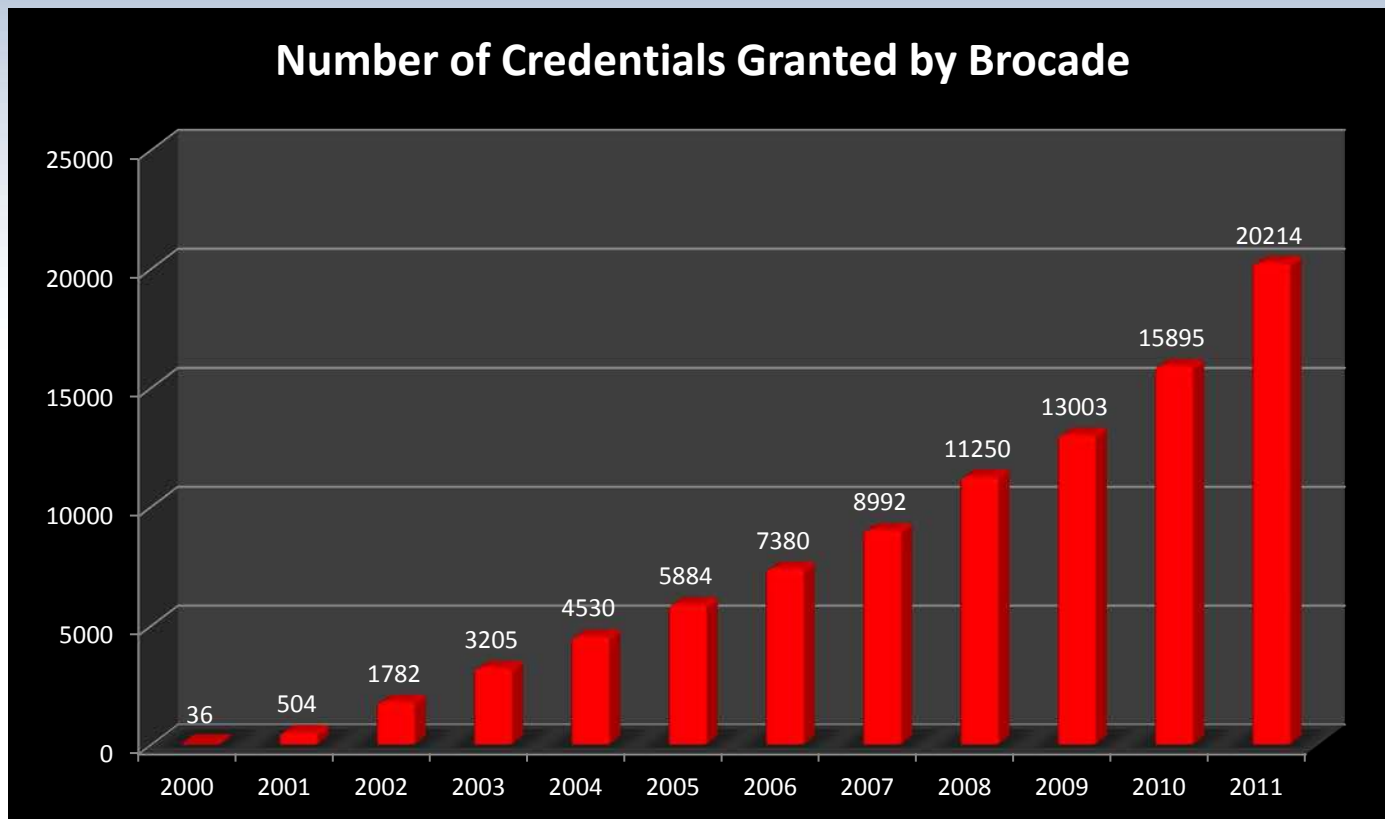- In 2002, we added a second certification
    - At that time, traction began

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In-House Application

- We commissioned an in-house application to be built
  - Developed in Oracle; owned and managed by IT
  - Accepted data from Pearson VUE automatically
  - Had minimal reporting; used Business Objects
  - Allowed minor maintenance to demographics
  - No way to make manual entries
  - Better than spreadsheets

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Steady Growth

Number of Credentials Granted by Brocade

Year	Credentials
2000	36
2001	504
2002	1782
2003	3205
2004	4530
2005	5884
2006	7380
2007	8992
2008	11250
2009	13003
2010	15895
2011	20214

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2008: Sweeping Changes

- In late 2008 we held a Global JTA
  - We wanted to move away from our current single cell model
  - The certified base asked for more credentials
    - Greater variety
    - Entry-level and advanced
    - Something more for which to strive

- The program needed to scale
  - Broader and deeper
  - Allow for customer self-service
  - Handle larger volumes
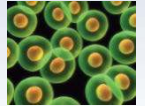
2009: Over the Edge

- We knew we were acquiring Foundry Networks
  - Foundry had their own certification program
    - That program had to be integrated into ours
    - Their records were all manual, in Excel
  - The net result
    - A doubling of our offerings
    - A larger certified base

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2009: Time for Action

- To accommodate our new direction we needed:
  - Complex logic in the database
  - Better reporting capabilities
  - Opt-in for privacy
  - Fulfillment support
  - Security monitoring
- At the same time, our legacy system was failing
  - Original developers were gone
  - No documentation existed

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2009: Time to Evolve

- We needed a sophisticated credential management tool
- After evaluation, we chose CertMetrics™
  - It saved us ½ of a headcount right away
  - We saved $30,000/year in fulfillment costs
  - Our customer satisfaction skyrocketed
- We went from a small, to a mid-sized program
  - Our industry stature rose

What?

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- Nonprofit Association
- 20 Certification Programs
- 4 ISO Accredited
- > 250,000 exams per year

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Credential Management System: What?

- What should you consider when choosing a CMS?

- What questions should you ask potential vendors?

- What other factors will influence your decision?

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What should you consider when choosing a system?

- Storing and organizing data

  - Program

  - Credential

  - Exam

  - Candidate demographics

- Managing and synchronizing data

  - multiple sources and vendors

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What should you consider when choosing a system?

- Tracking candidate progress
    - For eligibility requirements
    - Credential requirements
    - Continuing education
- Support
    - Candidate enrollment
    - Online agreements
    - Fee collection
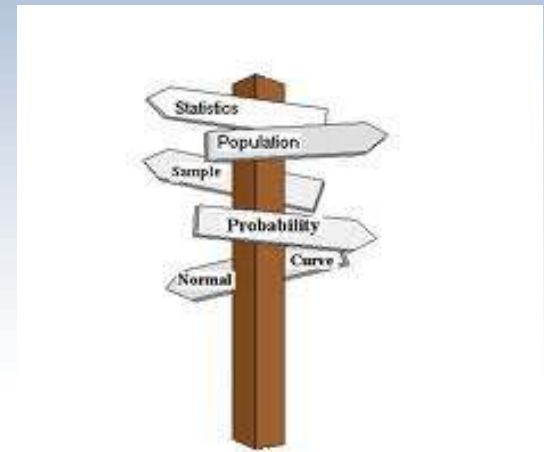
What should you consider when choosing a system?

- Queuing and tracking fulfillment
- Providing candidates access
  - View their exam history
  - Track their progress
- Reporting capabilities
- Security
- Psychometrics

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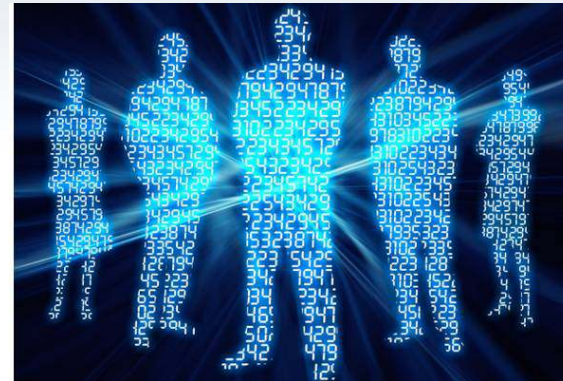
What questions to ask a potential vendor?

- How long have you been in business?
    - Established Vendor
- What is your focus?
    - Customer driven
- Are your developers on staff?
    - This provides more flexibility
    - Ability to make recommendations for the future
- How long before we are up and running?
    - Ramp up time

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What other things will influence your decision?

- Cutting edge product
- Experience with "certification" database
- "Can do" attitude
- Pricing
  - No hidden fees
  - Upfront about costs going forward

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How?

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- IT Performance Solutions
  - ✧ Certification Program started in 2007
  - ✧ Started with one certification track and one exam
  - ✧ Currently with two certification tracks and four exams
  - ✧ Planning on developing new tracks

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Implementing a Robust Credential Management Solution: How?

- Planning
- Execution
- Validation
- What is next?

Implementing a Robust Credential Management Solution: How?

- Planning
  - ✧ Training
  - ✧ Connect with test deliver partner
  - ✧ Providing Program information, logics
  - ✧ Customization
  - ✧ Identifying users
  - ✧ Implementation

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Implementing a Robust Credential Management Solution: How?

- Execution

    ✧ Implementation
    ✧ Customization
    ✧ Initial tests

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Implementing a Robust Credential Management Solution: How?

- Validation

  ✧ Historical data
  ✧ Accounts
  ✧ Reports
  ✧ Emails

Implementing a Robust Credential Management Solution: How?

- What is Next?

  - ✧ Gradual roll-out and use
  - ✧ Exploring features and reports

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Implementing a Robust Credential Management Solution: How?

- Immediate benefits of implementing a Robust CMS:
  - ✧ It saved us ½ of a headcount
  - ✧ We saved $15,000/year in fulfillment costs
  - ✧ Customer satisfaction increased (internal and external)
- Better Program Management
  - ✧ Better tools and accurate information in volume and trends
  - ✧ Quick and accurate access to Psychometric data

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Questions?

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Thank You

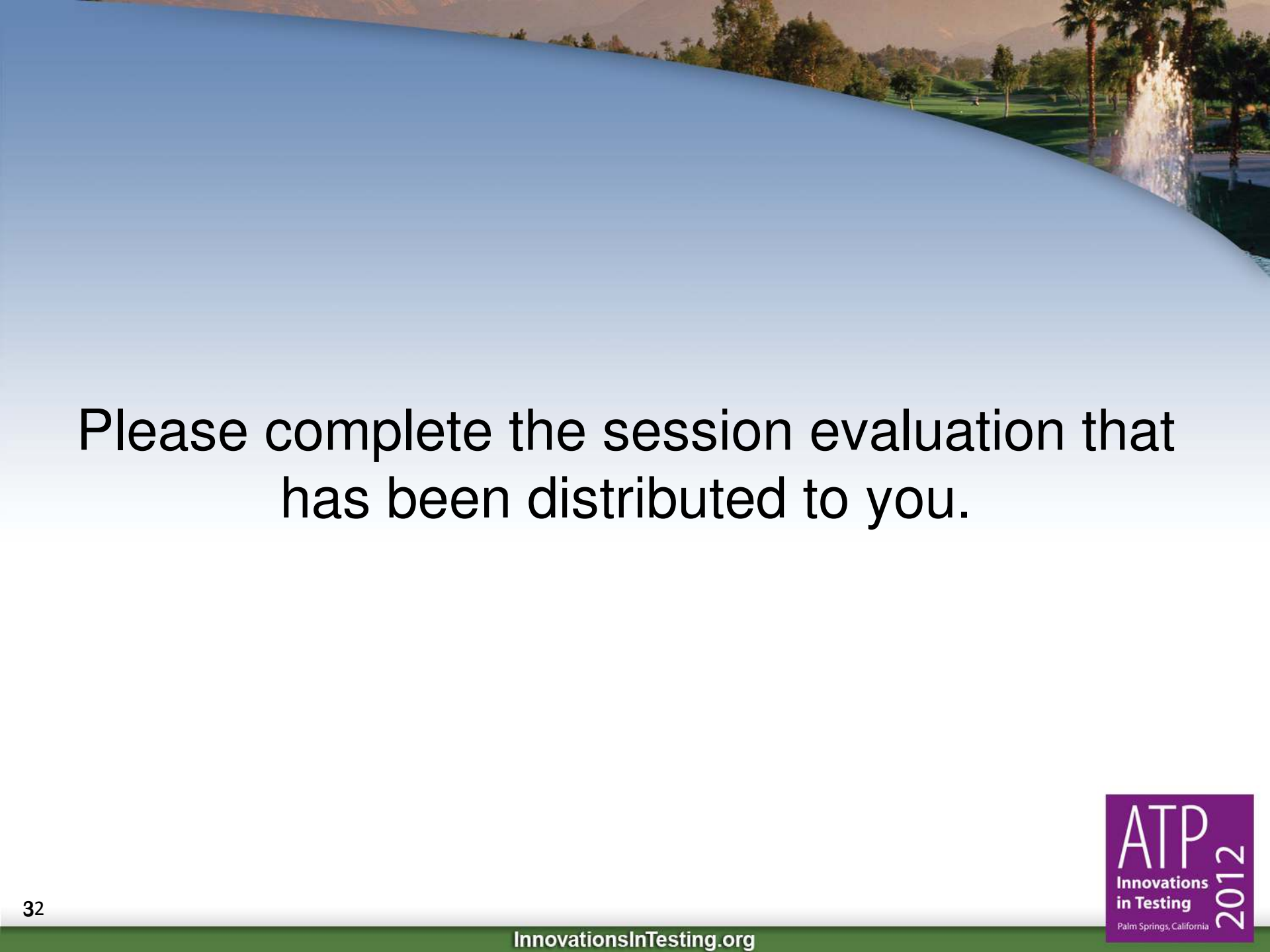If you have any questions, please contact

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