



**ALPINE TESTING
SOLUTIONS**

CertMetrics™

When, What and How of Credential Management (Considerations for Implementing a Credential Management Solution)

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Would your program benefit from a robust credential management solution?

Candidate Considerations

- Would candidates benefit from having 24/7, self-service tools to:
 - access demographic information, eligibility status, exam results, credential status, continuing education status, and/or other program data;
 - share exam and credential transcripts with third-parties;
 - download authenticated score reports and certificates;
 - track fulfillment;
 - submit questions to customer service and receive responses?
- Would candidates prefer to access and view their information in the language of their choice?

Customer Service Considerations

- Is your customer service staff spending significant time:
 - responding to requests that you would rather the candidates could resolve themselves;
 - resolving issues arising from missing records, merges and demerges, duplicate records, etc.;
 - updating candidate demographic information;
 - starting, tracking, and reporting fulfillment processes;
 - performing processes that could be automated?
- Is your candidate service staff lacking tools that would make their work more efficient?

Reporting Considerations

- Would your program benefit from:
 - scheduling and automating delivery of reports to program stakeholders;
 - 24/7, self-service reporting tools;
 - 24/7, self-service access to item analysis and forms analysis reports?
- Is the data generated by your program being wasted or underutilized?

Program Considerations

- Does your program have credentials that are awarded based upon complex logic?
- Could your program save money by providing downloadable score reports and certificates?
- Would your program benefit from automated security processes to detect anomalous results and policy infractions prior to awarding a score report or credential?
- Would your program benefit from one-off and automated communications to candidates?
- Does your program supply data to other systems or consume data from other systems?
- Is managing renewal and continuing education demands a significant burden?
- Does your program have unique attributes that have prevented you from using credential management systems in the past?
- Do you feel like you are building and running a data management organization rather than a credentialing organization?

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

- What are the current and future goals of your program?
- What are the current and future needs of your candidates?
 - What tools, services, and options do you wish to provide to your candidates via the system when it launches?
 - What tools, services, and options would you like to provide to your candidates via the system in the future?
 - What are the other current and future needs of your candidates?
- What are the current and future needs of your support staff?
 - What tools do you wish to provide to your customer service team via the system when it is launched?
 - What tools do you wish to provide to your customer service team via the system in the future?
 - What are the other current and future needs of your customer service team?
- What are the current and future needs of other program stakeholders?
 - Who are the different program stakeholders and user groups that need access to the system?
 - What tools, services, and options do you wish to provide to the different program stakeholders and user groups via the system when it launches?
 - What tools, services, and options would you like to provide to the different program stakeholders and user groups via the system in the future?
 - What are the other current and future needs of your other program stakeholders and user groups?
- What are the current and future security needs of your program?
 - What types of data forensics and policy violations would you like to monitor?
 - What are the other security needs of your program?
- What are the current and future reporting needs of your program?
 - What reports will you and your stakeholders wish to generate from the system?
 - What dashboards will you and your stakeholders wish to view in the system?
 - What other current and future reporting needs do you have?
- What are the current and future logic needs for your program?
 - What events, milestones, and other requirements must be accommodated in your eligibility logic?
 - What events, milestones, and other requirements must be accommodated in your credentialing logic?
 - What events, milestones, and other requirements must be accommodated in your fulfillment logic?
 - What events, milestones, and other requirements must be accommodated in your ongoing renewal and continuing education logic?
 - What are the other current and future logic needs of your program?
- What additional needs does your program have?
 - With what other internal and external systems or vendors must the credential management system interface?
 - What are your expectations with regards to support provided by the system vendor?
 - Are there ways you would you like to access and use your data that you are not currently able to support?

- What one-off and automated candidate communications would you like the system to support?
- What are your historical data requirements:
 - How many candidates are in your current system?
 - How many certifications are tracked in your current system?
 - How many candidate records will need to be imported into the new system?
- What other additional needs does your program have?
- What are the benefits you wish to recognize by implementing a new credential management system?
- What is your budget for implementing a new credential management systems?
 - What is the budget for implementation?
 - What is the annual budget for licenses, hosting, and support?
 - What is the annual budget for custom enhancements?
- How will future initiatives impact your program?

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

- Who will be on the implementation team and what role will they fulfill?
 - Project Manager
 - Certification Program Expertise
 - Support Manager
 - Executive/Decision Makers
 - Technical Experts
- What is the timeline and are there multiple phases of the implementation?
 - What are the priorities for a multiple phased implementation?
- Who understands the history of the data and how it is currently stored?
- Who will respond to data migration questions?
- What are the requirements for earning and maintaining the various credentials?
- What are candidates awarded when a credential is earned?
 - Electronic certificate
 - Printed certificate
 - Wallet cards
 - Logos
 - Other
- Who are the test user groups and at what points will they be involved in the process?
- What level of training is required for each user group?
- Who is in charge of the branding and marketing of the solution?
- How will candidates be notified of the new system and access it for the first time?
- Who will be the point of contact for the system once it is live?
- What is the timeline and are there multiple phases of the implementation?