

TO CERTIFY OR NOT

6 QUESTIONS TO GUIDE STRATEGIC DECISION MAKING

THE CHALLENGE

When faced with an opportunity to introduce a new credential or overhaul an existing one, how does your leadership approach the decision-making process?

Questions often emerge throughout the multi-layered process. Is there a real need? How does the need vary across stakeholder groups? What type of product (certification, education, assessment-based certificate program, micro-credential, etc.) best fits those needs?

The stakes for this decision are relatively high—choosing the right program will engage stakeholders while the wrong decision can be a costly mistake. Taking a strategic approach to decision-making increases your chance of success, provides a framework for considering all options, and ensures individuals involved are armed with the right information.

The process and questions outlined in this guide provide a strategic decision-making framework.

WHAT'S A STRATEGY SCREEN?

- Tool used to inform and guide decisions
- Used any time a key decision is being made
- Keeps decision-making closely aligned with the organization's mission, vision, and strategic plan
- Makes it easier to say no to projects unaligned with the organization's mission
- Developed during a facilitated strategy session

THE TOOLS

Build a solid foundation and facilitate healthy discussion by having the right information and tools from the start.

- Use your existing mission, vision, and purpose statements to provide context to the decision.
- Align discussions with the existing strategic plan.
- Leverage a strategy screen (See "What's a Strategy Screen?" sidebar) to guide decision making at each step.
- Identify a neutral facilitator to guide discussions and keep the process focused.
- Bring in consultants, as needed, for specific areas of expertise such as: instructional design, psychometrics, strategic facilitation, governance structure, accreditation, legal, and marketing.

THE QUESTIONS

Guiding a strategic discussion is difficult. Participants can get easily distracted, side tracked, or lost in the “weeds” of implementation. Use these 6 questions to help keep the conversation focused.

1. WHY ARE WE DOING THIS?

- What are the motivating factors behind considering the program? Developing a clear purpose and supporting goals comes from understanding the needs that underly interest in a new program. For example, if the need is to fill a gap in training, or increase workforce readiness, the goals may be very different than if the primary motivation is to create a robust revenue stream.
- What is the organization trying to accomplish with the program? The purpose and goals should be clearly identified and agreed upon.
- How does the program tie into the organization's mission, vision, purpose, and strategic goals? A strategy screen (See “What's a Strategy Screen?” sidebar) will ensure that any new program is consistent with the strategic direction of the program. Programs aligned with the purpose of the organization are better positioned for long-term success.

2. IS THERE A REAL NEED?

- Conduct a competitive analysis to understand any existing programs, the quality of those programs, and the overall competitive landscape. Beyond existing programs, factor in other organizations positioned to create competing programs.
- Consider any external factors driving the program. For example, are regulatory or legislative requirements contributing to the identified need?
- Seek as much input and objective data as possible. Keep in mind that a small, but vocal, group can falsely amplify perceived interest in a new program.

3. IS THERE A MARKET?

- Conduct a feasibility study to determine if the perceived need and/or interest in the program matches with the needs and interests of the target market(s). The study can be used to collect data regarding interest in various types of programs, potential pricing, interest from various stakeholder groups, possible delivery channels and assessment types, as well as the potential market.
- Identify metrics, including the number of members, eligible prospects, non-members, etc. to support the discussion and provide context into the market.
- Evaluate your access to the market. Determine if you have, or can access, needed contact information.
- Identify available partners and assess their willingness to support a new or re-vamped program.
- Identify existing education/training programs that may support a credentialing program. Understand how individuals will get ready to tackle the program you have created.
- Determine if employers value a new product, whatever form that product takes, and to what extent they may be willing to actively support the program.
- Evaluate future trends related to the job and/or role. For example, is demand for the job/role increasing, or is it likely to be obsolete in the future?

4. ARE WE READY TO INVEST IN THE SUCCESS OF THE PROGRAM?

- Know the costs and resources needed for the initial development and launch, especially since these phases often have no associated revenue.
- Evaluate the resources needed for ongoing maintenance. These needs vary widely depending on the type of program selected.
- Understand how long it will take to break-even and eventually recoup the initial program investment. Ensure adequate funding is available for a sufficient amount of time.

5. ARE WE PREPARED FOR THE LONG TERM?

- Understand the long-term commitment required to keep the program up-to-date and to meet your obligations to the individuals that participate in the program or purchase the product.
- Determine the ongoing resources needed to monitor changes in the job/role, address any international expansion needs, monitor and adjust to changing stakeholder needs, and respond to any regulatory or legislative changes.
- Plan for operational needs, including adequate staffing, subject matter expert meetings, instructional design and/or psychometric consultation, legal expenses, marketing activities, technology maintenance, program or test delivery, and ongoing quality improvement.

6. WILL WE SEEK THIRD-PARTY ACCREDITATION?

- Ensure the value proposition for accreditation is understood by evaluating the motivating factors for seeking accreditation. These might include any legislative/regulatory requirements, internal quality assurance purposes, stakeholder expectations, and competitive factors.
- Build the program to comply with accreditation standards from the start if accreditation is a likely goal. This will increase efficiency and save money in the long run.
- Understand the factors involved in choosing the appropriate standards and an accrediting body.