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Welcome to the AMA-Certified Professional in Management™ (AMA-CPM™) Recertification Program

Congratulations! You clearly recognized the importance of attaining your AMA-CPM credential; now, it is just as important to maintain your certification.

American Management Association International (“AMA”) is committed to providing quality management and leadership training and educational services to individuals and organizations while maintaining the highest commitment to ethical business practices, high-quality products, and services. AMA serves as a forum for the exchange of leading concepts, ideas, and insights on management practices and trends.

As AMA-CPM credential holders seek to maintain their credential through recertification, it is important to provide a wide range of high-quality courses, webinars, seminars, and workshops so that credential holders have a choice from which to choose their continuing education. AMA-CPM recertification recognizes the need to provide a broad range of management development and educational services to support the intellectual curiosity and well-being of the AMA-CPM community.

Why Maintain Your AMA-CPM Credential?

“The bottom line is, bad managers are bad for business, and they are even worse for their employees.” – Leah Arnold-Smeets

Based on the most recent 2018 data from the Organisation for Economic Co-operation and Development (stats.oecd.org/index.aspx?queryid=54752), 21.4% of the workforce are managers. Use your AMA-CPM credential to help advance your career and benefit your organization.

<table>
<thead>
<tr>
<th>Advance Your Career</th>
<th>Benefit Your Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Increase your worth and value to an organization</td>
<td>• Improve the positive impact successful managers have on your organization's bottom line</td>
</tr>
<tr>
<td>• Enhance your ability to be hired and promoted</td>
<td>• Provide an indicator of managerial competence across the organization</td>
</tr>
<tr>
<td>• Help distinguish yourself from others who are not certified</td>
<td>• Recognize and motivate leadership potential</td>
</tr>
<tr>
<td>• Foster greater career success as a more well-rounded manager with knowledge across multiple areas</td>
<td>• Decrease the likelihood that team members may leave due to poor management</td>
</tr>
</tbody>
</table>

“A bad manager can take a good staff and destroy it, causing the best employees to flee and the remainder to lose all motivation.” – Peter Drucker
The Recertification Cycle

To maintain your AMA-CPM, it is necessary to recertify every 3 years. The 3-year recertification cycle begins on the day you pass your certification exam. During the 3-year recertification cycle, you must accumulate 60 Professional Management Units (PMUs) attainable through continuing education and advancing the profession such as through volunteering, working and creating/presenting content.

Log into your Recertification Application to document learning, volunteer and work activities

Submit and pay Recertification Fee

Next 3-year recertification period begins

There are NO limits to the number of PMUs attained through education; however, a maximum of 20 PMUs can be attained through volunteering or creating/presenting content AND a maximum of 8 PMUs can be attained through work.

There are multiple paths in which to accumulate PMUs:

<table>
<thead>
<tr>
<th>Path</th>
<th>Maximum Number of PMUs</th>
<th>Short List of Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>No maximum</td>
<td>Classroom or Seminar</td>
</tr>
<tr>
<td>Work</td>
<td>8 PMUs</td>
<td>Team leader, influencer, manager</td>
</tr>
<tr>
<td>Volunteering</td>
<td>20 PMUs</td>
<td>AMA-CPM Certification Steering Committee member, AMA-CPM Advisory Board member, AMA-CPM subject matter expert for examination development, preparing or presenting management education</td>
</tr>
</tbody>
</table>
PMUs Through Education

To receive PMUs through education, all learning activities must have occurred during the 3-year recertification period. All learning activities must correlate to at least one of the four management domains as presented in the AMA Standard in Management™ (Appendix A) and in the AMA-CPM Test Specifications (Appendix B). In the Recertification Application, you will be required to document how many PMUs are specific to each domain:

<table>
<thead>
<tr>
<th>Four Management Domains:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Effectiveness</td>
</tr>
<tr>
<td>Relationship Management</td>
</tr>
<tr>
<td>Business Acumen</td>
</tr>
<tr>
<td>Analytical Intelligence</td>
</tr>
</tbody>
</table>

While there is no maximum number of PMUs one can submit under Education, there is a minimum. At least 32 PMUs must be attained from Education. Of these 32 PMUs, 3 PMUs are required in each domain. Once the 3 PMUs in each domain have been reached, there are no other domain-specific minimums to meet.

**Education: 32 PMU Minimum**

Within each domain:

<table>
<thead>
<tr>
<th>3 PMUs minimum in the domain of Professional Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 PMUs minimum in the domain of Relationship Management</td>
</tr>
<tr>
<td>3 PMUs minimum in the domain of Business Acumen</td>
</tr>
<tr>
<td>3 PMUs minimum in the domain of Analytical Intelligence</td>
</tr>
</tbody>
</table>
While exceptions may exist, depending on actual instruction time and educational format, the basic rule of thumb is a quarter of an hour of education = .25 PMUs with **1 hour of education being the minimum duration of a single learning event**.

In a case in which a learning event has already been assigned Continuing Education Credits (CEUs), the basic rule of thumb is .1 CEU = 1 PMU.

When entering the number of PMUs, please use the Timed Agenda that you will receive from your instructor. Timed Agendas should not include travel time, introductory or closing remarks, breaks or lunch. Please see What you need to include when submitting activities below for more information.

<table>
<thead>
<tr>
<th>Classification of Education</th>
<th>Number of PMUs Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-recorded webinars; self-paced learning events (on-demand); live streaming seminars; in-person classroom learning events; conference sessions</td>
<td>1 hour of instruction = 1 PMU</td>
</tr>
<tr>
<td></td>
<td>Any instruction that is not a whole number should be rounded to the nearest quarter of the hour – either up or down (15 minutes or 1/4 of an hour = .25 PMUs; 30 minutes or 1/2 an hour = .50 PMUs; 45 minutes or 3/4 of an hour = .75 PMUs).</td>
</tr>
<tr>
<td></td>
<td>For instance, enter 1.25 for an event that is 1 hour and 10, 15 or 20 minutes long; enter 2.50 for a learning event that is 2 hours and 25, 30 or 35 minutes long; enter 4.75 for an event that is 4 hours and 40, 45 or 50 minutes long; enter 5 for an event that is 4 hours and 55 minutes, 5 hours or 5 hours and 5 minutes long.</td>
</tr>
<tr>
<td>Semester long college course (Based on a 14-week semester)</td>
<td>1 credit = 14 contact hours/semester = 14 PMUs</td>
</tr>
<tr>
<td></td>
<td>2 credits = 28 contact hours/semester = 28 PMUs</td>
</tr>
<tr>
<td></td>
<td>3 credits = 42 contact hours/semester = 42 PMUs</td>
</tr>
<tr>
<td></td>
<td>4 credits = 56 contact hours/semester = 56 PMUs</td>
</tr>
<tr>
<td></td>
<td>*One course is based on a 14-week semester</td>
</tr>
</tbody>
</table>
What you need to include when submitting activities from education

**Before** you enter your activities, please collect the following information from the provider as it will be necessary to include this information with your submission:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Submit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Name (text)</td>
<td></td>
</tr>
<tr>
<td>Education Provider (text)</td>
<td></td>
</tr>
<tr>
<td>Presentation Date</td>
<td></td>
</tr>
<tr>
<td>URL of learning event</td>
<td></td>
</tr>
<tr>
<td>Course Description, Syllabus or Abstract (text or URL)</td>
<td>Brief statement informing the learner of the subject matter material and content that will be presented during the learning event.</td>
</tr>
<tr>
<td>Learning Objectives (text or URL)</td>
<td>Detailed statement describing how the learner will benefit from taking the course and what the learner will know and/or be able to do at the end of the learning event.</td>
</tr>
<tr>
<td>Timed Agenda (upload)</td>
<td>An agenda with the amount of time, in minutes, spent on each agenda item. The timed agenda MUST include the numbers of minutes/hours given to each Domain from the AMA Standards in Management (Professional Effectiveness, Relationship Management, Business Acumen, Analytical Intelligence).</td>
</tr>
<tr>
<td>Faculty Bio (text or URL)</td>
<td>The brief bio should be something that the instructor provides to you—maybe even available in his/her LinkedIn summary.</td>
</tr>
<tr>
<td>Proof of Completion (upload)</td>
<td>Examples include:</td>
</tr>
<tr>
<td></td>
<td>• Certificate of completion or achievement</td>
</tr>
<tr>
<td></td>
<td>• Transcript (in the case of a college course)</td>
</tr>
<tr>
<td></td>
<td>• Proof of conference attendance based on information from scanned badges upon entry into each conference session</td>
</tr>
<tr>
<td>Final Grade</td>
<td>For college courses only</td>
</tr>
</tbody>
</table>
How to enter PMUs from education

As soon as you pass your exam, you will be able to start entering PMU activities. **Log** into your AMA-CPM account to start entering your PMU activities (ama.learningbuilder.com). The recertification application will look like this:
Under Professional Management Units Earned Through Continuing Education, click on Add Activity:

- Webinars
- Self-paced learning event (on-demand)
- Live-streaming seminars
- In-person classroom learning events
- Conference sessions
- Semester-long college course

Please check the Recertification Handbook for submission requirements.

For all Education, 1 hour of education = 1 PMU
Any education that is less than 1 hour cannot be submitted for PMUs.

Always enter HOURS and NOT PMUs.
Enter the required information:

**Self-Reported Continuing Education: Document PMU: Course**

Please complete the fields below to record your continuing education activity.

- **Course Name**: 
- **Education Provider**: 
- **Completion Date**: MM/DD/YYYY
- **Course Delivery Format**:
  - Pre-recorded webinar
  - Self-paced learning event
  - In-person classroom learning event
  - Live-streaming seminar

**Self-Reported Continuing Education: Document PMU: Units**

Please complete the fields below to record your continuing education activity.

Before completing this section, please make sure that you have a copy of the timed agenda from your instructor or facilitator. The number of hours entered in each domain below MUST match the number of hours listed in the learning event’s timed agenda.

For each domain, please enter the duration in **hours**. Use the closest quarter-of-an-hour (.25) for durations that are not whole hours. For instance, enter 1.75 (1 hour and 45 minutes) for a learning event that is 110 minutes (1 hour and 50 minutes), enter 2 hours for an event that is 1 hour and 55 minutes long.

When calculating the duration, please do not include travel time, introductory or closing remarks, breaks or lunch.

- **Professional Effectiveness Hours**: 
- **Relationship Management Hours**: 
- **Business Acumen Hours**: 
- **Analytical Intelligence Hours**:

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Self-Reported Continuing Education: Add Supporting Documentation

Please paste from source documents, or, provide the URL for the following requirements:

- Course Description
- Learning Objectives
- Faculty Bio

Please upload PDF documents for the following requirements:

- Timed Agenda
- Course Syllabus (for College Course)
- Proof of Completion

Course Name:

Education Provider:

Course Description*:

Learning Objective(s)*:

Timed Agenda:

Remove

Faculty Bio*:

Proof of Completion*:

Upload

Back Finish Later Submit
As you add activities, note how the progress bar moves under Requirements:

PMUs Through Advancing the Profession

In addition to education, there are other ways to collect PMUs through professional activities. Known as “advancing the profession,” these activities are work or volunteer related. A maximum of 28 PMUs can be obtained through Advancing the Profession: 8 from work and 20 from volunteer activities.

To receive PMUs through advancing the profession, all activities must have occurred during the 3-year recertification period.

Work is defined as:

- Serving as an active contributing team member
- Serving as a team lead
- Having responsibility for organizing other team members
- Driving and motivating team members
- Acting as an influencer or “go-to” person without title authority
- Managing one or more direct reports
- Possessing functional or technical expertise
What you need to include when submitting work hours

The system will calculate the number of PMUs obtained based upon the hours that you enter, and you will be required to provide the following information:

- Start and end dates
- Hours of full-time employment being recorded for the current certification cycle
- Employer name
- Your position title
- Brief job description
- HR representative contact information
- The number of years you have in management experience

<table>
<thead>
<tr>
<th>Conversion of Hours Worked to PMUs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hours Worked</strong></td>
</tr>
<tr>
<td>Between 125 - 374 hours</td>
</tr>
<tr>
<td>Between 375 - 624 hours</td>
</tr>
<tr>
<td>Between 625 - 874 hours</td>
</tr>
<tr>
<td>Between 875 - 1124 hours</td>
</tr>
<tr>
<td>Between 1125 - 1374 hours</td>
</tr>
<tr>
<td>Between 1375 - 1624 hours</td>
</tr>
<tr>
<td>Between 1625 - 1874 hours</td>
</tr>
<tr>
<td>Between 1875 - 2000 hours</td>
</tr>
</tbody>
</table>

How to enter PMUs from work

Under Professional Management Units Earned by Working, click on Add Activity:
Enter the required information:

**Work PMUs: Document Activity**

*Work Is Defined As:*
- Serving as an active contributing team member
- Serving as a team lead
- Having responsibility for organizing other team members
- Driving and motivating team members
- Acting as an influencer or “go-to” person without title authority
- Managing 1 or more direct reports
- Possessing functional or technical expertise

(Evidence for audit—Employment validation)

**Conversion of Hours Worked to PMUs:**

<table>
<thead>
<tr>
<th>Hours Worked</th>
<th>PMUs Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Between 125 - 374 hours</td>
<td>1</td>
</tr>
<tr>
<td>Between 375 - 624 hours</td>
<td>2</td>
</tr>
<tr>
<td>Between 625 - 874 hours</td>
<td>3</td>
</tr>
<tr>
<td>Between 875 - 1124 hours</td>
<td>4</td>
</tr>
<tr>
<td>Between 1125 - 1374 hours</td>
<td>5</td>
</tr>
<tr>
<td>Between 1375 - 1624 hours</td>
<td>6</td>
</tr>
<tr>
<td>Between 1625 - 1874 hours</td>
<td>7</td>
</tr>
<tr>
<td>Between 1875 - 2000 hours</td>
<td>8</td>
</tr>
</tbody>
</table>

**Start Date:**

- MM/DD/YYYY

**End Date:**

- MM/DD/YYYY

**Work PMU Calculation:**

- 0

How many hours are you reporting for this PMU activity in the current certification cycle?*

**Employer Name**: *

**Position Title**: *

**Brief Job Description**: *

**HR Representative Phone Number**: *

**HR Representative Email**: *

How many years of management experience do you have?*

- Select Years of management experience:

[Submit]
As you add activities, note how the progress bar moves under Limits:

How to enter PMUs by volunteering with AMA or creating/presenting content

Volunteer activities fall into two categories:

- Providing subject matter expertise for AMA-CPM certification development
- Creating or presenting content

Subject Matter Experts (SMEs):

SMEs are an important element to the development and maintenance of a credential. Working with SMEs allows AMA-CPM staff to work directly with those who have earned the credential, see value in possessing the credential, and understand the responsibilities and roles associated with the credential. SMEs have an in-depth knowledge of the requirements needed to achieve the AMA-CPM credential.

Many who volunteer find the work engaging, enlightening and enjoy the opportunity to work with colleagues from other industries. Networking opportunities are plentiful; often, volunteers participate in more than one committee.
The following are volunteer opportunities and the number of PMUs awarded for each activity:

<table>
<thead>
<tr>
<th>Providing SME Expertise for AMA-CPM Certification Development</th>
<th>Number of PMUs Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serving on the Certification Steering Committee or Advisory Board</td>
<td>20 PMUs—including meetings and conference calls</td>
</tr>
<tr>
<td>2-day Certification Development meeting</td>
<td>16 PMUs</td>
</tr>
<tr>
<td>1-day Certification Development meeting</td>
<td>8 PMUs</td>
</tr>
<tr>
<td>1-hour Certification Development conference calls</td>
<td>1 PMU per hour</td>
</tr>
</tbody>
</table>

**What you need when submitting SME volunteer activities**

There is no required documentation needed when submitting PMUs for volunteer activities as each activity has a roster that is managed and monitored by AMA-CPM staff.

**How to enter PMUs from SME volunteer activities**

Under Professional Management Units Earned by Volunteering with AMA or Creating/Presenting Content, click on Add Activity:
Select the volunteer activity in which you participated:

For instance, Providing Subject Matter Expertise for Certification Development—2 Day Meeting and then click Submit:
As you add activities, note how the progress bar moves under Limits:

Creating or presenting content

Many who possess the AMA-CPM credential teach management in a variety of situations. In recognition of their contributions to the profession, we will award PMUs for the following activities that are conducted within the recertification cycle if the content aligns with one of the 4 Management Domains.

<table>
<thead>
<tr>
<th>Creating or Presenting Content</th>
<th>Number of PMUs Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparing and Presenting a College Course on Management</td>
<td>20 PMUs</td>
</tr>
<tr>
<td>Preparing and Presenting a Management Training Learning Event</td>
<td>15 PMUs</td>
</tr>
<tr>
<td>Preparing and Presenting a Presentation at a Conference</td>
<td>10 PMUs</td>
</tr>
<tr>
<td>Writing a Chapter on Management for an Edited Volume</td>
<td>20 PMUs</td>
</tr>
<tr>
<td>Preparing and Publishing a Peer-Reviewed Professional Journal Article</td>
<td>15 PMUs</td>
</tr>
</tbody>
</table>
What you need when submitting creating/presenting content activities

Before you submit content for PMUs, please make sure that you have the following information ready to enter in the application, as it will be necessary to include this information with your submission:

- Preparing and Presenting a College Course on Management:
  - Presentation/completion date (of material)
  - Name of institution (text)
  - Name of course (text)
  - URL of course being offered (URL)
  - Learning objectives (text or URL)
  - Syllabus or abstract (upload)
  - Timed agenda (upload)
  - Faculty bio (text or URL)

- Preparing and Presenting a Management Training Learning Event:
  - Presentation/completion date (of material)
  - Name of event provider (text or URL)
  - Name of event (text)
  - URL of event (URL)
  - Event description (text or URL)
  - Learning objectives (text or URL)
  - Delivery format (choose from list)
  - Timed agenda (upload)
  - Faculty bio (text or URL)

- Preparing and Presenting a Presentation at a Conference:
  - Presentation/completion date (of material)
  - Name of conference (text or URL)
  - URL of conference program (URL)
  - Name of presentation (text)
  - Learning objectives (text or URL)
  - Syllabus or abstract (upload)
  - Timed agenda (upload)
  - Faculty bio (text or URL)

- Writing a Chapter on Management for an Edited Volume:
  - Presentation/completion date (of material)
  - Learning objectives (text or URL)
  - Name of edited volume (Textbook) (text)
  - URL of edited volume (enter “n/a” if not available)
  - Name of chapter (text)
  - Chapter (upload)
  - Author bio (text or URL)
• Preparing and Publishing a Peer-Reviewed Professional Journal Article:
  ○ Presentation/completion date (of material)
  ○ Learning objectives (text or URL)
  ○ Name of journal (text)
  ○ URL of journal
  ○ Name of article (text)
  ○ Article (upload)
  ○ Author bio (text or URL)

**How to enter PMUs from creating/presenting content**

Under Professional Management Units Earned by Volunteering with AMA or Creating/Presenting Content, click on Add Activity:

![Image of PMU entry process](image-url)
Select the content activity in which you participated:

Select Activity for Professional Management Units Earned by Volunteering with AMA or Creating/Presenting Content (20 PMUs max)

<table>
<thead>
<tr>
<th>Title</th>
<th>Activity Type</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparing and Presenting a College Course on Management</td>
<td>Creating or Presenting Content</td>
<td>20.00</td>
</tr>
<tr>
<td>Preparing and Presenting a Management Training Learning Event</td>
<td>Creating or Presenting Content</td>
<td>15.00</td>
</tr>
<tr>
<td>Preparing and Presenting a Presentation at a Conference</td>
<td>Creating or Presenting Content</td>
<td>10.00</td>
</tr>
<tr>
<td>Writing a Chapter on Management for an Edited Volume</td>
<td>Creating or Presenting Content</td>
<td>20.00</td>
</tr>
<tr>
<td>Preparing and Publishing a Peer-Reviewed Professional Journal Article</td>
<td>Creating or Presenting Content</td>
<td>15.00</td>
</tr>
<tr>
<td>Serving on the Advisory Board</td>
<td>Volunteering with AMA</td>
<td>20.00</td>
</tr>
<tr>
<td>Serving on the Certification Steering Committee</td>
<td>Volunteering with AMA</td>
<td>20.00</td>
</tr>
<tr>
<td>Providing Subject Matter Expertise for Certification Development - 2 Day Meeting</td>
<td>Volunteering with AMA</td>
<td>16.00</td>
</tr>
<tr>
<td>Providing Subject Matter Expertise for Certification Development - 1 Day Meeting</td>
<td>Volunteering with AMA</td>
<td>8.00</td>
</tr>
<tr>
<td>Providing Subject Matter Expertise for Certification Development - 1 hour Conference Call</td>
<td>Volunteering with AMA</td>
<td>1.00</td>
</tr>
</tbody>
</table>

Enter the required information (Preparing and Presenting a College Course on Management, for instance):

Preparing and Presenting a College Course on Management: Document PMU Activity

- Presentation/Completion Date (of material)*: MM/DD/YYYY
- Name of Institution (text)*:
- Name of Course (text)*:
- URL of Course being offered*:
- Learning Objectives (text or URL)*:
- Syllabus or Abstract (upload)*: Upload
- Timed Agenda (upload)*: Upload
- Faculty Bio (text or URL)*:
- Professional Management Units: 20

Finish Later  Submit
As you add activities, note how the progress bar moves under Requirements:

Completing the Recertification Application

When you have completed entering all PMU activities, the Completing Application button at the bottom of the application will change to an orange Submit button. Click on Submit:
Follow the remaining prompts to verify your contact information, sign the Code of Ethics and pay the $100.00 recertification fee to submit the application:

In some cases, it may be necessary to request a 4-week extension to the 3-year recertification cycle. If that is necessary, please contact amacpm@amanet.org with supporting information detailing the reason for the request. The cost for late recertification is $150.00. Past the 4-week extension, the credential will expire, and those who want the AMA-CPM credential will need to retest.

Application Review and Audit

All submitted applications will be reviewed after the non-refundable application fee has been received. Applicants should allow 10-15 business days to receive notification on the status of their recertification application once it has been submitted.

Applicants recognize that AMA has the right to audit all information provided in the recertification application. If any information is not correct, the application will not be approved. About 10% of all recertification applications will be audited. During the audit, uploaded documents, URLs, and employment will be verified by an independent 3rd party.
Appendix A: AMA Standard in Management™

PROFESSIONAL EFFECTIVENESS

Professional effectiveness is the mastery of personal awareness and interpersonal skills, which enables individuals to manage themselves and communicate their brand and message.

Communication:

• Understand the elements of communication that transcend communication channels or situations.
• Apply communication skills in managing team performance, member satisfaction and innovation.
• Develop shared understanding of team’s goals using various communication strategies.
• Deliver clear messages related to team and organizational vision, goals and expectations.
• Manage emotionally charged communications through the use of strategies and techniques to minimize defensiveness and resistance.
• Identify verbal communication approaches to meet the needs and expectations of different audiences (for example, when delivering feedback to direct reports, contributing at meetings with the C-suite, etc.).
• Create clear and concise written communications in the form and manner best suited to the type of message and intended audience.
• Facilitate open conversations among supervisors, peers and direct reports.

Emotional Intelligence:

• Manage their own emotions as well as others’; handle emotionally charged situations effectively and with empathy.
• Promote a clear message of expectations, goals and vision; approach situations with clarity and purpose; are able to have critical conversations.
• Confidently plan, develop and deliver clear and impactful presentations; demonstrate confidence; create an engaging environment for the audience.
• Successfully manage relationships with other stakeholders.
• Create a motivational climate through delegation and collaboration.
• Influence others to support an idea, agenda or direction; understand the other party’s perspective and address it.
• Build trust and credibility to successfully negotiate for desired outcomes.
• Foster a culture of teamwork and accountability; approach and resolve conflict in a direct and purposeful manner.
• Monitor employee performance through ongoing feedback, coaching and goal setting; lead team through change.

Presentation Skills:

• Identify a clear purpose for a presentation.
• Select the appropriate audience for a presentation.
• Design and prepare a presentation flow, visuals and supporting materials that consider the audience needs, modality and intended outcomes.
• Deliver an engaging presentation, using appropriate technology and tools, that achieves its intended purpose and enhances credibility.
• Apply communication, emotional intelligence and influencing skills during a presentation to achieve the intended purpose.
RELATIONSHIP MANAGEMENT

Relationship management is the ability to establish and maintain professional relationships in order to support strategic goals and a culture of trust and collaboration.

Conflict Management:
- Model how to manage conflict by establishing a learning environment that encourages discourse.
- Encourage healthy debate among differing opinions.
- Identify underlying causes of conflict and address any incivility and bullying at work.
- Identify approaches for developing flexible responses to personal and professional conflicts.
- Use various models, techniques, strategies, and approaches to manage interpersonal communication behaviors in conflict situations.
- Implement flexible strategies to improve communication and to effectively respond to conflict.
- Create a productive relationship with human resources within the organization.

Motivation:
- Identify internal and external motivators and their impacts on individuals, teams, and the organization.
- Determine how to align individual’s needs to their role.
- Understand style differences, strengths, weaknesses, and strategies around how to co-create a motivational plan with each employee.
- Create and implement a communication plan for motivation.
- Participate in employee engagement surveys and be invested in the results.

Collaboration:
- Use the collaboration process in everyday work.
- Identify roles and responsibilities that guide collaboration and where there can be ambiguity or conflict.
- Create a foundation of collaboration that includes accountability and trust.
- Find a balance between assertion and cooperation and know which situations to use them in.
- Seek feedback from employees and teams as a key collaboration point.

Influence:
- Identify and articulate a successful outcome and others’ needs in order to create a shared vision and develop buy-in.
- Understand what can be accomplished with the cooperation and support of all stakeholders.
- Develop the credibility and trust required to leverage personal power and negotiate for desired outcomes.
- Gain commitment from other parties and demonstrate willingness to incorporate input from others.
- Influence strategies created by gathering data, identifying the people involved, and positioning rationale effectively.
- Build relationships and partnerships that result in mutual cooperation through trust, credibility, and communication.
Delegation:

• Understand the function and purpose of delegation as well as the potential benefits and barriers of effective delegation.
• Create a culture that supports delegation.
• Determine what tasks can and can’t be delegated.
• Facilitate the process of conducting a delegation discussion.
• Recognize the importance of tailoring methods and style to meet the needs of the employee.
• Monitor the delegation process to maintain control and support without micro-managing the employee.
• Debrief the delegation process with the employee and close out a completed assignment.
• Identify the challenges of delegating with a virtual workforce or remote employees.

Coaching for Performance:

• Assess employee performance and work with employees to develop clear criteria so they can objectively assess their own performance.
• Work with employees to help them identify and commit to specific, measurable and realistic goals.
• Present feedback to employees on behaviors and performance, empower them to collect and analyze feedback from their colleagues and other stakeholders, and use active listening techniques to empathize with and demonstrate understanding of their point of view.
• Guide employees to develop a plan for their development and growth, aligning performance goals to organizational goals.
• Manage emotions by keeping a calm tone and engaging in open discussion, and support employees in tolerating their own emotions even when challenging and unpleasant.
• Hold employees accountable for achieving their performance goals, address performance problems in a timely and fair fashion, and encourage employees to hold themselves accountable and proactively seek help when at risk of falling short.

Managing Change:

• Collect information about the change’s drivers and anticipated value.
• Identify the ways in which the change will affect your team, identifying benefits as well as technical and emotional barriers.
• Share information about the change, including its impacts.
• Express confidence and support in individuals’ and the team’s ability to be successful with the change.
• Establish ongoing two-way communication, seeking and listening to team members’ concerns and potential solutions and sharing new information and results.
• Effectively apply communication, emotional intelligence, conflict management, motivation, collaboration and influencing skills to manage resistance and promote a successful change implementation.

BUSINESS ACUMEN

Business acumen is the understanding of business operations at the financial, functional and strategic levels, while maintaining a customer-focused approach.
Managing Projects:
• Understand the basic project management skills a business manager will need.
• Plan the work required to complete a project.
• Document many project artifacts to enable success, including project plans, budgets, risks and assumptions.
• Identify, analyze and manage stakeholder expectations.

Financial Acumen:
• Identify the key financial drivers of the business as well as the manager’s contributions to the overall success of the business.
• Identify financial conditions that impact the team’s budget, operations and functions to create processes for budgeting and forecasting.
• Analyze financial data to identify trends and issues that are important to the business and interpret the results to make decisions and/or recommendations.
• Summarize financial data and present in a clear and comprehensible format.
• Plan and develop a budget strategy to support organizational goals based on financial data, previous performance and forecasting.

Customer Focus:
• Understand the purpose and practice of customer-focused decision making.
• Identify methods to listen to customers’ needs and feedback.
• Recognize methods to design customer-centric experiences and reduce customer hassle
• Develop methods to address customer exceptions and personalization.
• Develop ideas to inspire, coach and empower employees to own customer experiences and deliver superior experience in every interaction.
• Recognize the importance and role of the internal customer as part of the external customer experience delivery.

Talent Management:
• Identify and practice the steps involved in talent acquisition as well as the advantage of asking open-ended interview questions.
• Understand what the S.T.A.R. method is and why it is important.
• Recognize the importance of talent alignment and how to go about aligning employees to their roles and responsibilities.
• Establish the most and least effective ways to share feedback with employees.
• Understand how to create and implement a successful succession plan.
• Recognized how to remain consistent when measuring talent and performance.
• Identify the different kinds of workplace harassment and what the manager’s role is in intervening.

ANALYTICAL INTELLIGENCE
Analysitical intelligence is the application of systematic thinking, analysis and data interpretation to support organizational objectives.
Critical Thinking:
• Employ the 3 bundles of critical thinking skills: being alert to cognitive biases, assessing persuasion techniques, and recognizing faulty reasoning when drawing conclusions.
• Recognize the importance of self-awareness for critical thinking.
• Be familiar with techniques useful for identifying specific biases.
• Identify specific patterns of weak arguments and persuasion techniques.
• Correct faulty reasoning that leads to mistaken or irrelevant conclusions.
• Craft scenarios to anticipate how critical thinking skills may inform specific work situations.

Managing and Mastering Data:
• Understand how to frame a business question and what language to use to build it.
• Identify the variables and data sources and extract and organize the data.
• Analyze and interpret the results and communicate to the stakeholders and act on the results.
# Appendix B: Test Specifications

<table>
<thead>
<tr>
<th>Code</th>
<th>Domain, Competency and Task</th>
<th>% of exam</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Professional Effectiveness</td>
<td>25%</td>
</tr>
<tr>
<td>01.01</td>
<td>Communication</td>
<td></td>
</tr>
<tr>
<td>01.01.01</td>
<td>Develop shared understanding of team goals using various communication strategies (for example, open-ended and targeted questions, individual discussions, or small- and large-group guided discussions).</td>
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</tr>
<tr>
<td>01.01.02</td>
<td>Deliver clear messages related to organizational vision and team goals and expectations.</td>
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<tr>
<td>01.01.03</td>
<td>Manage emotionally charged communication by employing strategies and techniques to minimize defensiveness and resistance.</td>
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<tr>
<td>01.01.04</td>
<td>Tailor verbal communication to meet the needs and expectations of different audiences (for example, direct reports, peers, supervisors, C-suite).</td>
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<tr>
<td>01.01.05</td>
<td>Deliver clear and concise written communication in the form and manner best suited to the type of message and intended audience.</td>
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<tr>
<td>01.01.06</td>
<td>Facilitate open conversations among supervisors, peers and direct reports.</td>
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<tr>
<td>01.02</td>
<td>Emotional Intelligence</td>
<td></td>
</tr>
<tr>
<td>01.02.01</td>
<td>Develop self-awareness of personal emotional state in order to interact with others in a professionally appropriate manner.</td>
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<tr>
<td>01.02.02</td>
<td>Develop strategies to support self-control and manage emotions in a calm and clear manner.</td>
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<tr>
<td>01.02.03</td>
<td>Recognize others’ emotional states through observation of nonverbal cues, body language, tone and behavior.</td>
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<tr>
<td>01.02.04</td>
<td>Engage in empathetic listening and ask questions in order to understand others’ motivations.</td>
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<tr>
<td>01.02.05</td>
<td>Minimize conflict and improve interactions by using strategies such as active listening, asking questions for clarification.</td>
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<tr>
<td>01.03</td>
<td>Presentation Skills</td>
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<tr>
<td>01.03.01</td>
<td>Prepare for presentations by identifying key and relevant content to deliver targeted information and a clear message.</td>
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<tr>
<td>01.03.02</td>
<td>Plan, develop and deliver clear, impactful presentations, using text, graphics and data.</td>
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<tr>
<td>01.03.03</td>
<td>Anticipate possible questions and concerns that may arise during a presentation, and prepare points of discussion to address them.</td>
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<tr>
<td>01.03.04</td>
<td>Interact with the audience by asking questions to increase engagement and understanding.</td>
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<tr>
<td>01.03.05</td>
<td>Assess characteristics of the audience, such as their role, how content relates to them, or their level of receptiveness.</td>
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<tr>
<td>01.03.06</td>
<td>Tailor and adapt message and delivery based on audience characteristics and circumstances surrounding the presentation.</td>
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</tr>
<tr>
<td>02</td>
<td>Relationship Management</td>
<td>35%</td>
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<tr>
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</tr>
<tr>
<td>02.01</td>
<td>Conflict Management</td>
<td></td>
</tr>
<tr>
<td>02.01.01</td>
<td>Identify issues (for example, systemic, personality differences, differences in work or management styles) that cause various types of conflicts.</td>
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<tr>
<td>02.01.02</td>
<td>Manage conflict as it occurs by assessing the severity of the situation and developing an understanding of the causes of the conflict.</td>
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<tr>
<td>02.01.03</td>
<td>Explore options for a resolution by including all affected parties and listening to different perspectives.</td>
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<tr>
<td>02.01.04</td>
<td>Communicate the solution by explaining the rationale and discussing the benefits and expectations for each party.</td>
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<tr>
<td>02.01.05</td>
<td>Coach others on how to resolve conflict in a constructive manner.</td>
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<tr>
<td>02.01.06</td>
<td>Develop a plan to resolve issues that have led to conflicts, involving all parties in identifying causes and solutions to ensure buy-in to proposed resolutions.</td>
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</tr>
<tr>
<td>02.02</td>
<td>Motivation</td>
<td></td>
</tr>
<tr>
<td>02.02.01</td>
<td>Assess team members’ styles or drivers to identify internal and external motivators.</td>
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<tr>
<td>02.02.02</td>
<td>Align goals and expectations to motivators to maximize opportunities for success while setting a high standard of performance.</td>
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<tr>
<td>02.02.03</td>
<td>Develop a motivational plan that appeals to others’ unique needs, motives and goals.</td>
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<tr>
<td>02.02.04</td>
<td>Recognize, reward and reinforce positive behaviors and opportunities for development.</td>
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</tr>
<tr>
<td>02.02.05</td>
<td>Model excellence, enthusiasm and commitment to the organization and the work.</td>
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<tr>
<td>02.03</td>
<td>Collaboration</td>
<td></td>
</tr>
<tr>
<td>02.03.01</td>
<td>Foster a culture of accountability within the team by defining objectives and goals, documenting the roles and responsibilities of stakeholders, and sharing credit for successes with others.</td>
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<tr>
<td>02.03.02</td>
<td>Create shared understanding of behavioral expectations for team members, such as open communication and respect, to enhance commitment to the team.</td>
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<tr>
<td>02.03.03</td>
<td>Assess strengths and weaknesses of team members to enhance efficiency by capitalizing on complementary skills.</td>
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<tr>
<td>02.03.04</td>
<td>Evaluate team dynamics by assessing team members’ work, environment and personalities to create opportunities for successful collaboration.</td>
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<tr>
<td>02.03.05</td>
<td>Encourage cooperation and teamwork among people who depend on each other to get work done.</td>
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</tr>
<tr>
<td>02.04</td>
<td>Influencing</td>
<td></td>
</tr>
<tr>
<td>02.04.01</td>
<td>Create a shared vision and develop buy-in by clearly articulating intended outcomes, identifying other parties’ needs and motivations, and incorporating input from others.</td>
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<tr>
<td>02.04.02</td>
<td>Describe a clear and compelling vision of what can be accomplished with all stakeholders’ cooperation and support.</td>
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<tr>
<td>02.04.03</td>
<td>Build relationships and partnerships that result in mutual cooperation through trust, credibility and communication.</td>
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<tr>
<td>02.04.04</td>
<td>Tailor influencing strategies and tactics in order to achieve desired outcomes.</td>
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</tr>
<tr>
<td>02.04.05</td>
<td>Negotiate for desired outcomes by leveraging understanding of self and others.</td>
<td></td>
</tr>
</tbody>
</table>
02.05 Delegation

02.05.01 Determine tasks to be delegated and align skills to available resources.

02.05.02 Give clear instructions and ensure that team members have all necessary information, requirements and resources; understand the timelines needed to complete delegated responsibilities.

02.05.03 Manage own and team members’ time by prioritizing activities and ensuring resources are allocated appropriately.

02.05.04 Adapt approach to delegation based on individuals’ motivations and behavioral styles.

02.05.05 Provide ongoing coaching and support without micro-managing delegated assignments.

02.05.06 Debrief delegated tasks and projects to identify key learnings and provide positive and constructive feedback as appropriate.

02.06 Coaching for Performance

02.06.01 Objectively assess employee performance and provide effective ongoing coaching and feedback.

02.06.02 Set specific, measurable and realistic goals and communicate expectations.

02.06.03 Engage in regular performance-related discussions focused on behaviors and outcomes, using active listening techniques to understand the other party’s perspective.

02.06.04 Develop a plan for improvement and growth, aligning performance goals to organizational goals.

02.06.05 Hold others accountable for achieving their performance goals and address performance problems in a timely and fair manner by clearly defining where expectations are not being met.

02.07 Managing Change

02.07.01 Evaluate and address the culture of the organization or group to assess readiness to change, and identify potential roadblocks.

02.07.02 Define clear targets and milestones for change efforts and gain team member support and commitment to implementing change.

02.07.03 Prepare and support team members to adopt change in order to drive organizational outcomes and success.

02.07.04 Communicate the case for changes, including the rationale and potential benefits of changes, the organizational strategy and the proposed action plan.

02.07.05 Provide clear, timely and accurate information about changes on an ongoing basis.

02.07.06 Manage resistance to change by seeking feedback, acknowledging doubts and hesitance, and addressing specific concerns.

03 Business Acumen 25%

03.01 Managing Projects

03.01.01 Develop, interpret and understand requirements for project planning by identifying and obtaining input from key stakeholders.

03.01.02 Manage change and scope creep throughout the project while adjusting timeline and managing expectations.
03.01.03 Create a collaborative environment with the project team and key stakeholders to address responsibilities, concerns and changes.

03.01.04 Use persuasion techniques to gain buy-in and commitment from stakeholders.

03.01.05 Address challenges in project stakeholder relationships to defuse conflict and promote positive interactions.

03.02 Financial Acumen

03.02.01 Identify the key financial drivers of the business as well as the manager’s contributions to the overall success of the business.

03.02.02 Identify financial conditions that impact the team’s budget, operations and functions to create processes for budgeting and forecasting.

03.02.03 Analyze financial data to identify trends and issues that are important to the business, and interpret the results to support decision-making.

03.02.04 Summarize financial data and present it in a clear and comprehensible format.

03.02.05 Plan and develop a budget strategy, based on financial data, previous performance and forecasting, to support organizational goals.

03.03 Customer Focus

03.03.01 Develop and improve processes that support superior customer experience by collecting feedback from customers and identifying needs, expectations and satisfaction.

03.03.02 Develop a culture of accountability by emphasizing the importance of customer service for organizational success.

03.03.03 Provide guidelines, tools and training for handling customer issues.

03.03.04 Develop and apply metrics to measure value and impact of customer focus initiatives.

03.03.05 Model desired behavior with customers through actions, discussions and professional development.

03.03.06 Foster a culture of empowerment by acknowledging and reinforcing customer-focused behaviors.

03.04 Talent Management

03.04.01 Align potential and current talent to organizational goals through recruitment, development of skills, and motivation.

03.04.02 Enhance employee performance by assessing skill gaps and providing coaching and support for development.

03.04.03 Foster an environment that champions diversity, inclusion and respect by acknowledging and embracing differences and encouraging open lines of communication.

03.04.04 Review and adhere to federal and state laws related to employment.

03.04.05 Encourage individual and team engagement through effective onboarding, alignment to company goals, and acknowledgment.

03.04.06 Identify situations that require escalation to other parties (e.g., human resources, ethics hotline, board of directors).
<table>
<thead>
<tr>
<th>04</th>
<th>Analytical Intelligence</th>
<th>15%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>04.01</strong></td>
<td>Critical Thinking</td>
<td></td>
</tr>
<tr>
<td>04.01.01</td>
<td>Identify trends in the industry or marketplace and develop plans to prepare for opportunities or avoid problems.</td>
<td></td>
</tr>
<tr>
<td>04.01.02</td>
<td>Challenge established thinking, processes and procedures to identify improvements in methods and potential solutions.</td>
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<tr>
<td>04.01.03</td>
<td>Draw evidence-based conclusions after examining data, researching multiple perspectives and evaluating arguments.</td>
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</tr>
<tr>
<td>04.01.04</td>
<td>Recognize own biases in order to accurately evaluate arguments.</td>
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</tr>
<tr>
<td>04.01.05</td>
<td>Maintain an objective viewpoint in order to make reasoned, complex decisions.</td>
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<tr>
<td>04.01.06</td>
<td>Use appropriate tools, resources and expertise to develop the best solution to a given problem or situation.</td>
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<tr>
<td>04.01.07</td>
<td>Translate abstract ideas into tangible results and actions that can be understood and viably considered.</td>
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</tr>
<tr>
<td><strong>04.02</strong></td>
<td>Managing and Mastering Data</td>
<td></td>
</tr>
<tr>
<td>04.02.01</td>
<td>Synthesize and summarize quantitative and qualitative information from multiple sources.</td>
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<tr>
<td>04.02.02</td>
<td>Recognize trends and patterns and make business recommendations based on data analysis.</td>
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</tr>
<tr>
<td>04.02.03</td>
<td>Structure and present information in multiple formats and modalities to support a business decision or recommendation.</td>
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</tbody>
</table>