



**CERTIFIED**  
Professional in Management™

# AMA CERTIFIED PROFESSIONAL IN MANAGEMENT™

APPROVED EDUCATION  
PROVIDER HANDBOOK

[www.amanet.org/cpm](http://www.amanet.org/cpm)

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# General Information

## Thank You!

Thank you for your interest in becoming an Approved Education Provider (AEP) for the AMA Certified Professional in Management™ (AMA-CPM™) recertification program. We are delighted that you are considering being part of the continuing education journey for AMA-CPM credential holders and invite you to learn more about the program and become an AEP.

Like your organization, 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 and 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.

For more information on the recertification process for credential holders please see the [Recertification Handbook](#).

## About the AMA-CPM™

To attain the AMA-CPM certification, applicants must meet eligibility requirements; pass a fair, valid and reliable examination; participate in ongoing credential maintenance; and adhere to a Code of Ethics and Conduct.

The AMA-CPM designation is a tool that allows organizations to recognize those with managerial competence and leadership potential. The AMA-CPM credential embodies the critical knowledge, skills and abilities aligned with AMA’s Standard in Management™ ([Appendix A](#)).

Managers who attain the AMA-CPM credential will be able to show current and future employers that they have met a standard that exemplifies critical knowledge, skills and abilities needed for professional managers which includes professional effectiveness, relationship management, business acumen and analytical intelligence.

## Benefits of Becoming an AEP

- Increase your reach to learners
- Be listed as an approved education provider
- Use the AMA-CPM Certified Professional in Management AEP logo
- Receive updates to the AMA-CPM program in a timely manner



## Who can be an AEP?

The following entities may be eligible to become an AEP:

- Schools of higher education
- Training consultant firms
- Government training organizations
- Internal staff training divisions (i.e., internal “learning academies”)
- Management and leadership training organizations

To become an AEP or to renew the AEP status, an [AEP application](#) must be completed and submitted to the AMA-CPM recertification team. Prior to filling out the [AEP application](#), please become familiar with the AMA-CPM Approved Education Provider Standards ([Appendix B](#)). For detailed guidance on how to complete the AMA-CPM Approved Education Provider and Course Submission applications, please see [Appendix C](#) and [Appendix D](#). AMA reserves the right in its sole discretion to at any time change, revise, add, eliminate or otherwise modify any provisions of the AMA standards, policies and procedures including, without limitation, the provisions of the Approved Education Provider Handbook.

## Continuing Education Professional Management Units (CE PMUs)

The following are examples of education opportunities taken during the applicable recertification period that may qualify for CE PMUs:

- in-person classroom learning events
- webinars
- self-paced courses (on-demand)
- live-streaming seminars
- conference sessions
- college courses

## How to calculate PMUs

To obtain CE PMUs for learning events, each learning event must correlate to tasks associated within each competency per Domain. Please see [Appendix F](#), AMA Certified Professional in Management™ Test Specifications, for the list of tasks and competencies per Domain.

While exceptions 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 instruction being the minimum duration of a single learning event**. All minutes should be rounded to the nearest quarter of the hour whether up or down.

Classification of Education	Calculation
Live Webinars, prerecorded webinars or self-paced courses (on-demand)*, seminars (including conference seminars**), in-person training	1-hour of instruction = 1 PMU 75 minutes of instruction = 1.25 PMUs 90 minutes of instruction = 1.5 PMUs 105 minutes of instruction = 1.75 PMUs 2-hours of instruction = 2 PMUs, etc.
* To determine the number of hours of instruction for a pre-recorded or self-paced course (on-demand), use the <i>pilot test study</i>	
** Conference sessions held during meals are not eligible for PMUs.	



Day-long classes or seminars	1-hour of instruction = 1 PMU
Semester long college course—based on a 14-week semester	1 credit = 14 contact hours/semester = 14 PMUs
	2 credits = 28 contact hours/semester = 28 PMUs
	3 credits = 42 contact hours/semester = 42 PMUs
	4 credits = 56 hours contact hours/semester = 56 PMUs

**NOTE: PMUs can only be applied to actual instruction time and should not include breaks, opening and closing remarks, and lunch, for instance.**

## Fees

- Annual application fee (submitted with the AEP application form): \$500.00 (USD) (non-refundable)
- If approved, in addition to the application fee, there is a \$2,000.00 (USD) annual AEP agreement fee which includes all course submissions.
- If opting for a 3-year AEP agreement, the overall fee will be \$6,000 (USD) (rather than \$7,000.00) as the 2nd and 3rd year application fees will be waived.

The appropriate AEP agreement fee will be due at the same time that the signed and dated AEP agreement is submitted to [RecertProv@amanet.org](mailto:RecertProv@amanet.org). For reference, please see [Appendix G](#) to view the AEP agreement which will be sent electronically.

## What to expect after submitting AEP and Course Submission(s) Applications

It is important to follow the information and directions provided in [Appendices C](#) and [D](#) before submitting both the AEP and Course Submission applications.

All AEP and Course Submission applications will be reviewed to make sure that the application is complete. Please allow up to 10 business days from the time you submit your application to receive status information. Any questions on an application or any incomplete application will be flagged, and an AMA-CPM recertification representative will contact the submitting organization's point of contact for more information.

Applications may be selected for audit to ensure that courses submitted for PMUs comply with the AMA-CPM AEP Standards ([Appendix B](#)) and provide professional, management and leadership training, support the intellectual curiosity and well-being of the AMA-CPM community, and use AMA-CPM Intellectual Property (IP) appropriately. If selected for audit, evidence for each standard will be requested and reviewed. Please see [Appendix B](#) for detailed information on the standards and the required evidence.

Once approved, AEPs will be provided a link for the Course Submission application. If multiple courses are being submitted, a separate application will need to be completed for each course. Alliteratively, to submit multiple courses in bulk, please contact [RecertProv@amanet.org](mailto:RecertProv@amanet.org).

Courses that are accepted will be added to the AMA-CPM Learning System Management library.

If an AEP or Course Submission application is denied, the recertification team will provide the reason(s) for this determination and the submitting organization will have two weeks to remediate any outstanding issues and submit any necessary information. Notwithstanding anything herein to the contrary, AMA reserves the right in its sole discretion to accept or reject any AEP application or Course Submission application for any reason.



## Whom to contact?

For a prompt reply, please email the AMA-CPM recertification team at [RecertProv@amanet.org](mailto:RecertProv@amanet.org) for any AEP related questions or issues.

## Terms and Conditions and Proper Use of the AMA-CPM AEP and PMU Logos

All AEPs must sign, date and return the AMA Certified Professional in Management™ Approved Education Provider Agreement which is presented in [Appendix G](#) for informational purposes.

The use of AMA Intellectual Property is limited to the use of the AMA-CPM AEP logo seen here:



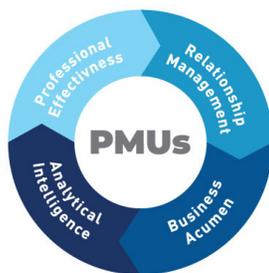
Once approved, the AEP has the authority to use the AMA-CPM AEP logo on their website and on all learning event activities that are approved for the recertification program. AEPs may not use the AMA or AMA-CPM logo. When using the AMA-CPM AEP logo, include the following statement of acknowledgement "The AMA-CPM Approved Education Provider logo is a trademark of the American Management Association International." as such:



The AMA-CPM Approved Education Provider logo is a trademark of the American Management Association International.

When presented in print, for the first usage, include "(AMA-CPM™)" after AMA Certified Professional in Management™, so it appears as such: "AMA Certified Professional in Management™ (AMA-CPM™)". Thereafter, it can be presented without the superscript TM and independently such as "AMA Certified Professional in Management" or "AMA-CPM".

The AEP has the authority to use the PMU logo alongside or below any course that has been approved for CE PMU standing. When using the PMU logo, include the following statement of acknowledgment "This course is valid for (fill in authorized number) PMUs with the following breakdown per domain (fill in appropriate number per domain)." as such:



This course is valid for (fill in authorized number) PMUs with the following breakdown per domain (fill in appropriate number per domain).

# 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 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**

Analytical 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: Approved Education Provider Standards

To ensure that all education providers seeking AEP status have met the same standards for excellence in education and quality control, AMA has created quality standards to which all education providers must comply. If selected for audit, the following supporting documentation must be submitted to [RecertProv@amanet.org](mailto:RecertProv@amanet.org).

Unless an extension is requested and granted, the AEP and course applications will close if no action is taken after 30 days of audit notification. All submissions must be in PDF form and must be named with the organization's name and submission (i.e., ORG Name\_Code of Ethics).

Standard 1 Organization	Evidence
a) The AEP must be incorporated or recognized as a legal entity in good standing.	Tax ID.
b) The AEP must have an anti-discrimination code of conduct for staff, instructors and vendors.	Code of Ethics and Professional Conduct—must include an anti-discrimination code of conduct for staff, instructors and vendors.
Standard 2 Facilities and Technical Support	Evidence
a) The AEP must have a set standard for the learning environment which benefits the learner.	Policies and guidelines that indicate how the learning environment appropriately supports and engages the learner.
b) The AEP must have administrative and technical support service available to facilitators and participants.	Available tools and procedures used to provide administrative, and technical support to facilitators and learners before, during and after the learning event.
Standard 3 Design and Development Team	Evidence
a) The AEP must have standards that identify qualified individuals responsible for instructional design, development, and delivery of learning programs.	Professional requirements or job description for individuals responsible for instructional design and development of learning programs; instructor's bio for those teaching the program.
b) The AEP must hold recurring performance evaluations for trainers and facilitators.	Completed performance evaluations pertaining to trainers and/or facilitators currently employed with the provider. If trainers and facilitators teach multiple events, evaluations must be submitted for each event.
Standard 4 AEP Program Development	Evidence
a) The AEP must have a policy on how to keep courses and material current.	Policy on how courses are updated and how often the courses are updated.



<p><b>b)</b> The learning event must address one or more of the four Domains as presented in the AMA Standards in Management™.</p>	<p>Includes but not limited to copies of learning objectives, course description, syllabus (if applicable), timed agenda.</p>
<p><b>c)</b> The learning event must include activities that illustrate that learners have achieved the learning objectives.</p>	<p>Includes but not limited to polling questions (for webinars), assessment tools (for self-paced or on-demand events), and/or interactive activities (for conference sessions).</p>
<p><b>d)</b> The AEP should have a policy and process to calculate the number of PMUs, both in total and per domain, for the learning events.</p>	<p>Documentation illustrating how PMUs were calculated and assigned per domain and how this is represented on the timed agenda or pilot studies as applicable.</p>
<p><b>Standard 5 Program and Learner Documentation Maintenance</b></p>	<p><b>Evidence</b></p>
<p><b>a)</b> The AEP must have guidelines ensuring that PMUs are issued to the participant who registered and participated in the learning program.</p>	<p>Policies and procedures in practice ensuring PMUs are issued to the participant who registered for, participated in and completed the learning program.</p>
<p><b>b)</b> The AEP must have guidelines notifying the participant of not qualifying to receive PMUs based on set requirements.</p>	<p>Policies and procedures in place notifying learners why PMU requirements were not met and therefore not awarded.</p>
<p><b>c)</b> The AEP must have an appeal process for learners to follow when PMUs are denied.</p>	<p>Policies and procedures in place for learners to follow when appealing denied PMUs</p>
<p><b>d)</b> The AEP must have the ability and guidelines to generate and retain the participant/learner’s transcript for the longer of seven (7) years or as required by law. The transcript must include: Learner’s name, Title of the Learning Program, Dates and location, Instructor’s name, Number of PMUs earned, Breakdown of PMUs by category.</p>	<p>Policies and procedures regarding records retention.</p>
<p><b>e)</b> The AEP must have guidelines to safeguard the learner’s information.</p>	<p>Policies and procedures addressing safeguarding learner’s personal identifiable information.</p>



# Appendix C: How to Complete the Approved Education Provider Application

Please follow these guidelines when completing the [AEP Application](#).

**A.** Please indicate if this is a new or renewal application.

**B – F.** Please provide the requested information on the organization

**G.** Please indicate the type of education the organization provides. If there are multiple responses, please choose all that apply. The options include:

✓		✓	
	Schools of higher education		Internal staff training divisions (i.e., internal “learning academies”)
	Training consultant firm		Management and leadership training organizations
	Government training organization		Other: Please provide a brief description of your organization

**H.** Please describe the genre of education that the organization provides. If there are multiple responses, please choose all that apply. The options include:

✓		✓	
	In-person classroom learning events		Live-streaming seminars
	Webinars		Conference sessions
	Self-paced courses (on-demand)		College courses

**I.** Please attach a pdf copy of your organization’s Code of Ethics and Professional Conduct which must include an anti-discrimination code of conduct for staff, instructors and vendors

**J.** Fees and Payment:

- Annual application fee (submitted with the AEP application form): \$500.00 (USD) (non-refundable)
- If approved, in addition to the application fee, there is a \$2,000.00 (USD) annual AEP agreement fee.
- If opting for a 3-year AEP agreement, the overall fee will be \$6,000 (USD) (rather than \$7,000.00) as the 2nd and 3rd year application fees will be waived.

The appropriate AEP agreement fee will be due at the same time that the signed and dated AEP agreement is submitted to [RecertProv@amanet.org](mailto:RecertProv@amanet.org). For reference, please see [Appendix G](#) to view the AEP agreement which will be sent electronically.



# Appendix D: How to Complete the Course Submission Application

The link for the Course Submission application will be sent to the AEP once the AEP application is approved.

Before completing a course submission application, please make sure that the course being submitted **addresses specific tasks associated within the appropriate competency and domain**. Please see [Appendix F](#), AMA Certified Professional in Management™ Test Specifications for the list of tasks and competencies per Domain.

Please follow these guidelines when completing the Course Submission Application. All guidelines are based on the AMA-CPM Approved Education Provider Standards ([Appendix B](#)).

**A.** Please enter the Provider’s incorporated name (no abbreviations please).

**B. – C.** Please provide the name and delivery format of the learning event. Please make sure that only **one format** is selected. If the learning event can be offered in more than one format, i.e., Pre-recorded or Live streaming, please consider each learning event a separate event and complete a different Course Submission Application for each format. The options include:

✓	In-person classroom learning event	✓	Live-streaming seminar
	Webinar		Conference session
	Self-paced course (on demand)		College course

To submit multiple courses in bulk, please contact [RecertProv@amanet.org](mailto:RecertProv@amanet.org).

**D.** Please enter the initial start and end date of the learning event. Initial date must be after the current date and both the initial start and end dates must be within the current year.

**E.** Please provide the URL for the learning event.

**F.** Please provide a brief description of the subject matter material that will be presented during the learning event.

**G.** Please provide a brief description of the learning objectives and how the learner will benefit from taking the course. What will the learner know or be able to do at the end of the learning event?

**H.** Learning events can be geared to the early-, mid- or advanced-career manager. Please indicate the management career level(s) for which the learning event is intended. Please select all that apply.

**I.** Learning events can be available to the public through open registration, to an organization through private contract (on-site), or, to an organization through internal staff training. Please indicate how this learning event will be available. Please select all that apply.

**J.** If calculating the number of PMUs for a **live or in-person learning event** (i.e., conference session, college course, seminar), please provide the following information to calculate the total number of PMUs that should be awarded:

- Total number of hours allotted to the **ENTIRE** learning event.
- Sum of all breaks, lunch, and opening and closing administrative remarks.
- Total number of hours of actual class time (Total number of hours allotted to the **ENTIRE** learning event—sum of all breaks).



If calculating the number of PMUs for a **self-paced course (on demand)** or **prerecorded learning event**, please provide the total number of hours based on the average of 5 completed pilot study forms.

**K.** For each learning event, please indicate the number of hours spent in each domain. Round hours to the nearest quarter of an hour—whether up or down. The sum of all hours should equal the total number of hours of actual class time.

Domain	Round to the nearest quarter of an hour—whether up or down
Professional Effectiveness	
Relationship Management	
Business Acumen	
Analytical Intelligence	

**PLEASE NOTE: 1 hour of education is the minimum duration for a single learning event. Please round hours to the nearest quarter of an hour—whether up or down.**

**L.** To support the Course Submission Application please submit the following information:

- 1. Standard 3a:** Instructor’s Bio—1 PDF that includes all bios of faculty teaching this event in the current year.
- 2. Standard 4a:** Timed Agenda, or complete syllabus if submitting a college course. If submitting a timed agenda, please use the Timed Agenda Template in [Appendix E](#) as a guideline.
- 3. Standard 4b:** Pilot Studies—1 PDF that includes all 5 pilot studies used to calculate PMUs. This is required only for self-paced, prerecorded and webinar formats).



# Appendix E: Timed Agenda Template

Please use this template when creating a timed agenda for your course submission and save the file as a PDF using the following format: Company Name\_Course Title\_Timed Agenda (for example, ORG Name\_How to Manage Difficult Relationships\_Timed Agenda) and upload this document in the appropriate place in the Course Submission application.

**Education Provider Name:**

**Learning Event Title:**

**Initial Start Date of Learning Event** (must be after current date and applicable for the current year only):

Entries are for example purposes only:

Time	Module/Objectives/Topic	Instructional Methodology*	Domain
<b>Day 1</b>			
9:00 – 9:10	Course Introduction	Lecture	
9:10 – 9:40	Icebreaker	Group Activity	
9:40 – 9:45	Course Overview	Lecture	
<b>Module 1 Title:</b>			
9:45 – 10:45	Learning Objectives: <ul style="list-style-type: none"> <li>• Objective Title</li> <li>• Objective Title</li> <li>• Objective Title</li> </ul>	Lecture/Discussion	Relationship Management
10:45 – 11:00	Break:		
11:00 – 12:15	Learning Objectives: <ul style="list-style-type: none"> <li>• Objective Title</li> <li>• Objective Title</li> <li>• Objective Title</li> </ul>	Group Activity	Relationship Management
12:15 – 1:00	Lunch		
1:00 – 2:45	Learning Objectives: <ul style="list-style-type: none"> <li>• Objective Title</li> <li>• Objective Title</li> <li>• Objective Title</li> </ul>	Debrief from Activity/Discussion	Relationship Management
2:45 – 3:00	Break:		



3:00 – 5:00	Learning Objectives: <ul style="list-style-type: none"> <li>• Objective Title</li> <li>• Objective Title</li> <li>• Objective Title</li> </ul>	Game/Simulation/Discussion	Relationship Management
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\*Instructional methodologies can include but are not limited to group discussion, case study, team activity, individual exercise, role play, instruments such as the Myers-Briggs Type Indicator®, polling questions, game/simulation, demonstration, peer review, questions & answers, assessment, writing assignments, presentations and problem solving.



# Appendix F: AMA Certified Professional in Management™ Test Specifications

Code	Domain, Competency and Task	% of exam
<b>01</b>	<b>Professional Effectiveness</b>	<b>25%</b>
<b>01.01</b>	<b>Communication</b>	
01.01.01	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).	
01.01.02	Deliver clear messages related to organizational vision and team goals and expectations.	
01.01.03	Manage emotionally charged communication by employing strategies and techniques to minimize defensiveness and resistance.	
01.01.04	Tailor verbal communication to meet the needs and expectations of different audiences (for example, direct reports, peers, supervisors, C-suite).	
01.01.05	Deliver clear and concise written communication in the form and manner best suited to the type of message and intended audience.	
01.01.06	Facilitate open conversations among supervisors, peers and direct reports.	
<b>01.02</b>	<b>Emotional Intelligence</b>	
01.02.01	Develop self-awareness of personal emotional state in order to interact with others in a professionally appropriate manner.	
01.02.02	Develop strategies to support self-control and manage emotions in a calm and clear manner.	
01.02.03	Recognize others' emotional states through observation of nonverbal cues, body language, tone and behavior.	
01.02.04	Engage in empathetic listening and ask questions in order to understand others' motivations.	
01.02.05	Minimize conflict and improve interactions by using strategies such as active listening, asking questions for clarification.	
<b>01.03</b>	<b>Presentation Skills</b>	
01.03.01	Prepare for presentations by identifying key and relevant content to deliver targeted information and a clear message.	
01.03.02	Plan, develop and deliver clear, impactful presentations, using text, graphics and data.	
01.03.03	Anticipate possible questions and concerns that may arise during a presentation, and prepare points of discussion to address them.	
01.03.04	Interact with the audience by asking questions to increase engagement and understanding.	
01.03.05	Assess characteristics of the audience, such as their role, how content relates to them, or their level of receptiveness.	
01.03.06	Tailor and adapt message and delivery based on audience characteristics and circumstances surrounding the presentation.	



<b>02</b>	<b>Relationship Management</b>	<b>35%</b>
<b>02.01</b>	<b>Conflict Management</b>	
02.01.01	Identify issues (for example, systemic, personality differences, differences in work or management styles) that cause various types of conflicts.	
02.01.02	Manage conflict as it occurs by assessing the severity of the situation and developing an understanding of the causes of the conflict.	
02.01.03	Explore options for a resolution by including all affected parties and listening to different perspectives.	
02.01.04	Communicate the solution by explaining the rationale and discussing the benefits and expectations for each party.	
02.01.05	Coach others on how to resolve conflict in a constructive manner.	
02.01.06	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.	
<b>02.02</b>	<b>Motivation</b>	
02.02.01	Assess team members' styles or drivers to identify internal and external motivators.	
02.02.02	Align goals and expectations to motivators to maximize opportunities for success while setting a high standard of performance.	
02.02.03	Develop a motivational plan that appeals to others' unique needs, motives and goals.	
02.02.04	Recognize, reward and reinforce positive behaviors and opportunities for development.	
02.02.05	Model excellence, enthusiasm and commitment to the organization and the work.	
<b>02.03</b>	<b>Collaboration</b>	
02.03.01	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.	
02.03.02	Create shared understanding of behavioral expectations for team members, such as open communication and respect, to enhance commitment to the team.	
02.03.03	Assess strengths and weaknesses of team members to enhance efficiency by capitalizing on complementary skills.	
02.03.04	Evaluate team dynamics by assessing team members' work, environment and personalities to create opportunities for successful collaboration.	
02.03.05	Encourage cooperation and teamwork among people who depend on each other to get work done.	
<b>02.04</b>	<b>Influencing</b>	
02.04.01	Create a shared vision and develop buy-in by clearly articulating intended outcomes, identifying other parties' needs and motivations, and incorporating input from others.	
02.04.02	Describe a clear and compelling vision of what can be accomplished with all stakeholders' cooperation and support.	
02.04.03	Build relationships and partnerships that result in mutual cooperation through trust, credibility and communication.	
02.04.04	Tailor influencing strategies and tactics in order to achieve desired outcomes.	
02.04.05	Negotiate for desired outcomes by leveraging understanding of self and others.	



<b>02.05</b>	<b>Delegation</b>	
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.	
<b>02.06</b>	<b>Coaching for Performance</b>	
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.	
<b>02.07</b>	<b>Managing Change</b>	
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.	
<b>03</b>	<b>Business Acumen</b>	<b>25%</b>
<b>03.01</b>	<b>Managing Projects</b>	
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.

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**03.02 Financial Acumen**

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- 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.

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**03.03 Customer Focus**

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- 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.

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**03.04 Talent Management**

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- 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).

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**04 Analytical Intelligence 15%**

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**04.01 Critical Thinking**

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- 04.01.01 Identify trends in the industry or marketplace and develop plans to prepare for opportunities or avoid problems.



- 04.01.02 Challenge established thinking, processes and procedures to identify improvements in methods and potential solutions.
- 04.01.03 Draw evidence-based conclusions after examining data, researching multiple perspectives and evaluating arguments.
- 04.01.04 Recognize own biases in order to accurately evaluate arguments.
- 04.01.05 Maintain an objective viewpoint in order to make reasoned, complex decisions.
- 04.01.06 Use appropriate tools, resources and expertise to develop the best solution to a given problem or situation.
- 04.01.07 Translate abstract ideas into tangible results and actions that can be understood and viably considered.

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**04.02 Managing and Mastering Data**

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- 04.02.01 Synthesize and summarize quantitative and qualitative information from multiple sources.
- 04.02.02 Recognize trends and patterns and make business recommendations based on data analysis.
- 04.02.03 Structure and present information in multiple formats and modalities to support a business decision or recommendation.



# Appendix G: AMA Certified Professional in Management™ Approved Education Provider Agreement

## AMA Certified Professional in Management™ Approved Education Provider Agreement

This Agreement is entered on \_\_\_\_\_, 2021 between American Management Association International (“AMA”) with an address at 1601 Broadway, New York, New York 10019 and \_\_\_\_\_ (“AEP”) with an address at \_\_\_\_\_.

- 1) AMA hereby authorizes AEP to be an approved educational provider to provide training courses eligible for professional management units (“PMUs”) in connection with the AMA Certified Professional in Management™ (“Credential” or “AMA-CPM™”) recertification requirements on the terms set forth herein.
- 2) AEP shall comply with all standards, policies and procedures as may be promulgated by AMA from time to time including, without limitation, the AMA Approved Education Provider Handbook (“AEP Handbook”). AEP agrees that AMA in its sole discretion may at any time change, revise, add, eliminate or otherwise modify any provisions of the AMA standards, policies and procedures including, without limitation, the provisions of the AEP Handbook.
- 3) AEP shall conduct its educational and business operations in a professional and lawful manner and shall not impugn the reputation of AMA or the Credential. AEP shall at all times remain in compliance with all applicable laws, rules and regulations of all applicable jurisdictions.
- 4) AEP shall designate a representative who will be the contact person for the administration of AEP’s responsibilities hereunder.
- 5) AEP shall submit any course for which it seeks to award PMUs in connection with the Credential to the AMA-CPM Recertification Team. Such courses shall be reviewed for alignment to the concepts and methodologies set forth in the Management Body of Knowledge® published by AMA. As set forth in the AEP Handbook, AEP shall submit materials to the AMA-CPM Recertification Team as evidence demonstrating such alignment.
- 6) AEP shall maintain adequate resources, facilities and support to deliver its courses in a professional and competent manner. AEP’s courses shall be developed and presented by competent subject matter experts and instructors with proven professional skills and expertise in the relevant fields of course development and instruction.
- 7) AEP shall maintain appropriate attendance records for attendees of its courses for a period of the longer of seven (7) years or as otherwise required by law. AEP shall provide course attendees with appropriate documentation evidencing the attendees’ successful completion of the applicable course. AEP shall maintain an attendee evaluation process to provide feedback regarding course content and instruction. AMA shall be permitted to contact such course attendees to assess the quality of the course content and instruction. AEP also agrees to provide to AMA-CPM Recertification Team any materials necessary for audit as set forth in the AEP Handbook.
- 8) AEP shall use AMA’s methodology in awarding PMUs to course attendees successfully completing the applicable course. All such qualifying courses shall be at least one hour in course instruction as set forth in the AEP Handbook.



9) AEP acknowledges and agrees that AMA Certified Professional in Management™, American Management Association, American Management Association International, AMA Certified Professional in Management™ Approved Education Provider, AMA and the stylized AMA-CPM AEP and PMU logos are the trademarks of AMA and AMA has the sole and exclusive ownership of and right to use such marks and all related intellectual property and materials. AMA hereby grants AEP a revocable, limited, non-exclusive, non-transferable license to use the AMA-CPM Approved Education Provider and PMU logos only in connection with advertising the courses authorized for PMUs by AMA subject to such further restrictions as determined by AMA from time to time. AEP shall use the AMA-CPM Approved Education Provider and PMU logos in accordance with the use guidelines set forth in the Terms and Conditions and Proper Use of the AMA-CPM AEP and PMU Logos section of the AEP Handbook.

AEP shall maintain AMA's indicia of ownership of such AMA intellectual property as set forth in in the AEP Handbook or as otherwise directed by AMA.

10) AEP shall not state or otherwise indicate that the course authorized for PMUs has been endorsed by or that the content or results of taking such course(s) are guaranteed by AMA. AEP may indicate that it is an approved provider for PMU credit toward the Credential continuing education requirements with respect to the course which has been authorized for PMU credit by AMA only in accordance with the use guidelines set forth in the Terms and Conditions and Proper Use of the AMA-CPM AEP and PMU Logos section of the AEP Handbook.

11) As set forth in this Agreement and the AEP Handbook, AEP agrees to comply with all provisions pertaining to the use of the AMA-CPM Approved Education Provider and PMU logos, as such provisions may be modified by AMA from time to time.

12) AMA reserves the right in its sole discretion to revoke the approved education provider status of AEP and terminate this Agreement at any time for any reason. Upon such termination, AEP's rights hereunder shall immediately terminate and AEP shall immediately cease all use of the AMA-CPM Approved Education Provider and PMU logos and any other AMA intellectual property.

13) In the event any provision of this Agreement shall be deemed to be invalid by a court of competent jurisdiction, that provision shall be stricken and the remainder of the Agreement shall remain in full force and effect.

14) AEP and AMA agree that this Agreement shall be governed by and construed under the laws of the state of New York, excluding its conflict of laws provisions. AEP agrees to submit to the exclusive jurisdiction of the state and federal courts located in New York, New York.

15) Subject to AMA's right of earlier termination as set forth in section 12 hereof, the term of this Agreement shall be one (1) year from the date first written above, whereupon all rights granted herein to AEP shall terminate.

IN WITNESS WHEREOF, the parties hereto have entered into this Agreement as of the date first written above.

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**(Name of Approved Education Provider)**



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(Signature)

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(Name)

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(Title)

**American Management Association International**

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Elisa Kahn  
Director of Certification

