TDRp Certification & Accreditation Process

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Introduction

Overview
This document addresses the credentialing process for Talent Development Reporting principles (TDRp).

Credentialing is an umbrella term used for the types of programs that verify the knowledge, skills and abilities of an individual or organization to perform certain tasks or functions. Included in credentialing are licensure, certification, accreditation, recognition designation, and certificates.

This document will focus on two specific types of credentialing, specifically, certification and accreditation.

- **Professional Certification**: A voluntary process by which a non-governmental entity grants a time-limited recognition to an individual after verifying that he or she has met predetermined and standardized criteria.
- **Accreditation**: A voluntary process by which a nongovernmental entity grants a time-limited recognition to an organization after verifying that it has met predetermined and standardized criteria.

The Value of Certification

A commonly asked question focuses on the value of the certification process itself – what does it mean for both the participant and the participant’s employer?

From the **employer’s perspective**, certification provides assurance that the employee is capable of implementing a specific process, in this case, the Talent Development Reporting principles. This certification is the only process available that provides an employer with the evidence and assurance about an employee’s capability in executing executive reporting projects.

From the **participant’s perspective**, certification is the validation of specific skills and knowledge. The principle advantage of certification is the confidence in having prescribed skills necessary to implement TDRp. In addition, certification will enable practitioners to secure, maintain and progress in the field of measurement and evaluation. Over time, as the TDRp certification becomes more widespread, it will likely be a prerequisite for involvement in benchmark studies, panel discussions, invitations to speak at conferences, writing articles, and publishing case studies.
From a software developer’s perspective, certification ensures that the technology solution conforms to the Talent Development Reporting principles. Specifically, certification verifies that the solution uses the appropriate inputs and measures, creates statements and reports consistent with TDRp guidelines and offers the appropriate level of customization to enable software users to make the reports and statements meaningful to their industry and work environment.

The Value of Accreditation
Accreditation, unlike certification, applies to organizations. In the case of TDRp, accreditation serves two purposes:

- For Consulting Services firms: accreditation enables an organization to sell TDRp compliant consulting services. Moreover, accreditation ensures that their organization has the requisite capability to deliver high quality consulting to its customers. Additionally, accreditation enhances the brand of the organization by designating it as “TDRp Accredited.” For potential clients of these organizations, accreditation helps them vet consultants who will help them build maturity in Talent Development Reporting.

- For firms that do not sell TDRp-related services, accreditation recognizes excellence in executive reporting and the ability of the Talent organization to ‘run talent like a business’.
The Approach

To ensure both an effective and efficient credentialing process, CTR has created a portfolio of common content to train individuals, consultants and software developers. In addition, CTR has created common templates (recognizing different audiences) for planning the TDRp project and the broader implementation plan. At the back end, the process varies based on the differing requirements of each audience. The table below describes this overall approach.

<table>
<thead>
<tr>
<th>Component</th>
<th>Type of content</th>
<th>Individual</th>
<th>Consultant</th>
<th>Software Developer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-work</td>
<td>• Common content</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>2.5-day certification workshop</td>
<td>• Common content</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Webinars</td>
<td>• Common content</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>TDRp project</td>
<td>• Common template</td>
<td>Internal project</td>
<td>Client project</td>
<td>N/A</td>
</tr>
<tr>
<td>Focus of TDRp implementation</td>
<td>• Common template</td>
<td>Talent Org or a subset (e.g. L&amp;D, Talent Acquisition)</td>
<td>Specific client implementation</td>
<td>S/W development process to automate TDRp</td>
</tr>
</tbody>
</table>
| Submits work products               | • Common process for individuals / consultants                                 | Internal project work products | Internal implementation plan for Talent or a Talent function | Work project  
• External client deliverables  
• External client TDRp implementation plan  
Other material  
• Consulting process documentation  
• Marketing collateral |
| Certification focus                 | • Talent practitioner in a Talent function                                     | Consultant who will implement TDRp services with clients | Consultant who will implement TDRp services with clients | Pre-release audit  
• Software inputs  
• Reports  
• Calculations Other material  
• Training materials  
• Marketing collateral |
| Accreditation available?            | • For the organization                                                         | For the Consulting Services business | For the Consulting Services business | N/A |
Certification

The End-to-End Process

The Certification process involves passing through three gates:

- **Gate 1** ensures commitment to the process of implementing TDRp either within a practitioner’s or client’s organization
- **Gate 2** ensures the implementation approach is sound and has the appropriate level of support to achieve success
- **Gate 3** ensures the quality of the process and deliverables

The benefits of a prescribed process are three-fold:

- CTR can provide guidance throughout the process
- For the certification candidate and TDRp Sponsor, the process creates a sense of urgency to complete the requirements
- Finally, the process enables the early and ongoing course correction and minimizes rework

The table below provides an overview of the Gate Process.

<table>
<thead>
<tr>
<th>Gate 1</th>
<th>Gate 2</th>
<th>Gate 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td><strong>Purpose</strong></td>
<td><strong>Purpose</strong></td>
</tr>
<tr>
<td>• Ensure TDRp sponsor and organization are committed to implementing TDRp</td>
<td>• Ensure TDRp implementation team is set up for success</td>
<td>• Ensure TDRp certification requirements have been met</td>
</tr>
<tr>
<td><strong>Deliverables</strong></td>
<td><strong>Deliverables</strong></td>
<td><strong>Deliverables</strong></td>
</tr>
<tr>
<td>• TDRp Certification Application &amp; Sponsor Commitment Plan</td>
<td>• TDRp Implementation Plan</td>
<td>• Complete four TDRp Certification Webinars</td>
</tr>
<tr>
<td></td>
<td>• TDRp Change &amp; Communications Plan</td>
<td>• TDRp Statements and reports</td>
</tr>
<tr>
<td></td>
<td>• Meeting with CTR, TDRp Sponsor and TDRp PM</td>
<td>• Progress reports and reflection</td>
</tr>
<tr>
<td><strong>How assessed</strong></td>
<td><strong>How assessed</strong></td>
<td><strong>How assessed</strong></td>
</tr>
<tr>
<td>• CTR review of TDRp Application &amp; Sponsor Commitment Plan</td>
<td>• CTR review of TDRp Implementation Plan and Change &amp; Communications Plan</td>
<td>• Confirm webinar completion</td>
</tr>
<tr>
<td></td>
<td>• Meeting with CTR, TDRp Sponsor and TDRp PM</td>
<td>• CTR review of TDRp documents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Meeting with CTR Sponsor and TDRp PM</td>
</tr>
</tbody>
</table>
Gate Descriptions

Gate 1: Commit
Gate 1 is a ‘get ready’ step in certification. It involves five steps to ensure understanding of the process and commitment to execute. These steps are highlighted below.

1. Read the certification document to ensure you understand the overall process
2. Complete TDRp Certification Application & Sponsor Commitment Plan; submit to CTR
   - TDRp sponsor name and project oversight approach
   - Project manager, team member
   - Organization type (internal, consultant, SW developer)
   - Implementation timeframe
   - TDRp focus: process, business unit, level of complexity
3. Conduct meeting: CTR + TDRp Sponsor + TDRp Implementation manager to review Commitment Plan
4. CTR approves completion of Gate 1 requirements
5. Organization pays Certification Fee

Note: that Gate 1 must be completed within 3 months after attending the TDRp Certification Workshop. See the FAQs for pricing considerations.

Gate 2: Plan
Gate 2 is a ‘get set’ phase involving the development of defined plan of action ensuring clear accountabilities and resources. The four primary steps are outlined below.

1. Develop TDRp Implementation Plan
   - Key activities & timeframes
   - Accountabilities
   - Milestones and review cycle
   - Use your own or CTR provided tools and template to build your implementation plan
2. Develop TDRp Change & Communications Plan
   - Key change issues and strategies to address them
   - Use your own or CTR provided tools & templates to build your Change & Communications Plan
3. Conduct meeting: Include CTR + TDRp sponsor + TDRp Implementation manager to review Implementation & Change Plan
4. CTR approves fulfillment of Gate 2 requirements
Gate 3: Implement

Gate 3 is the “Go” phase of the TDRp implementation. At the conclusion of the implementation, certification candidates and their sponsors are required to share the items identified below.

1. TDRp Implementation Plan
   - Documented progress against original plan
   - Revised go-forward plan

2. TDRp Change & Communications Plan
   - Documented progress against original plan
   - Revised go-forward plan

3. TDRp Implementation
   - Identified business goals
   - Completed Measures library tailored to the organization
   - TDRp statements and reports
   - Attendance at all 4 Certification webinars

4. Project reflection (see Template)
5. Review with Sponsor
6. Conduct meeting: CTR + TDRp Sponsor + TDRp Implementation manager to review implementation results
7. CTR approval of Gate 3 requirements and certification award

Critical Success Factors

One critical success factor is the role of the TDRp sponsor. Individuals who attend the workshop with the express purpose of completing the certification process must be supported by a senior leader within the talent function or the director of the consulting services function. This senior leader will become the TDRp sponsor and will:

- Ensure that the employee has sufficient time to focus on the TDRp effort (by readjusting work duties and documenting these expectation in the employee’s performance plan)
- Meet with CTR to ensure he/she understands their role and responsibilities in obtaining certification for their designated employee.
- Provide strategic guidance and input to the TDRp implementation plan
- Review and approve work products that will be submitted to the Center
- Provide additional information, if needed, to complete the certification

Another critical success factor is to ensure that the certification process receives the appropriate priority, both by the TDRp sponsor and the certification candidate. Because the end-to-end process spans 6-12 months, it is critical for the TDRp sponsor to include the implementation of TDRp in his/her performance objectives and review progress against those objectives at regular intervals.
Certification for Practitioners and Consultants

The end to end certification process requires the completion of six steps:

1. Pre-work required to prepare for the workshop
2. The 2.5-day certification workshop which builds TDRp specific skills
3. Approximately 1/2 day of training via Webinars to build knowledge and skills not addressed in the workshop but required for implementation of TDRp
4. TDRp Application and Sponsor Commitment Plan
5. TDRp Implementation Plan and TDRp Change & Communications Plan for their own or a client's organization after the workshop.
6. Development of specific TDRp work products

Process Flow

The diagram below depicts the end-to-end certification process for an individual (either a talent practitioner or a talent consultant). The six steps are highlighted in the orange circles. Each step is described in detail on the subsequent pages.

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**Certification: Individuals (Consultants or Talent Practitioners)**

- **TDI Sponsor**
  - Nominate employees for TDRp certification
  - Review learnings with workshops to attend
  - Complete TDRp Application & Sponsor Commitment Plan
  - Meet with CTR
  - Review & finalize plans
  - Regularly review project and work products
  - Submit Work Products to CTR
  - Update TDRp Work Products

- **Employee**
  - Complete Pre-work
  - Attend workshop
  - Attend webinars
  - Complete TDRp Application & Sponsor Commitment Plan
  - Meet with CTR
  - Review & finalize plans
  - Develop TDRp Implementation Plan and Change & Communications Plan
  - Works on TDRp project
  - Develops & updates TDRp Work Products

- **Center for Talent Reporting**
  - Conducts workshops
  - Meets with TDRp Sponsor & Project Manager
  - Meets with TDRp Sponsor & Project Manager to receive plans
  - Reviews work products
  - Changes required?

- **Gate 1 Requirements**
  - Gate 1 Requirements (1, 2, 4) Approved
  - Must be completed within 3 months after Workshop

- **Gate 2 Requirements**
  - Gate 2 Requirements (2) Approved
  - Expected 6+ months after Gate 2

- **Gate 3 Requirements**
  - Gate 3 Requirements (4) Approved
  - Certification Awarded

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Certification Steps

1. Pre-work
   The first step in the certification process is the completion of the TDRp Workshop pre-work, which includes the following:
   - Read the Introduction to TDRp (for Talent overall) and the 25-page TDRp for L&D Overview
   - Complete the TDRp maturity assessment diagnostic
   - Conduct an interview with the Department Head (e.g. CLO, VP of Talent Acquisition, Senior VP of HR) to understand the organization’s business priorities, key Talent projects aligned with those priorities and measures used to assess the contribution of HR toward the business goals. Based on this interview, the attendee needs to bring to the workshop:
     - Specific organization goals (e.g. 10 % increase in sales. SMART goals where possible)
     - Copies of relevant executive reports developed for Operations or Quarterly reviews. (Note: these reports are for the participant’s reference only and will not be shared with other participants)
   - Identify a potential project for implementing TDRp

2. Workshop
   The second step of the certification process is attending the 2.5 day TDRp Basics Workshop, which focuses on specific skills required for successful execution and sustainability of TDRp (see the Competency Model). The workshop is highly participative and focused on the participant’s business priorities and requirements. Interaction with other participants provides opportunities for additional sharing and learning. The first day focuses on the business case for executive reporting, the fundamentals of ‘running talent like a business’ and the foundations of TDRp including measurement elements and developing statements. The second day addresses the creation and use of the statements and reports. The third day addresses the benefits and challenges of implementation, managing the change process and developing an action and implementation plan. (See the Appendix which provides an overview of the 2.5-day learning experience).

   The workshop is designed for individuals in a leadership and/or coordination role implementing TDRp within their own or a client’s organization. Furthermore, these individuals would have been identified by their leaders as certification candidates. Job titles are likely to be varied and include individuals responsible for Talent Reporting, Talent Measurement or Talent Operations and well as Measurement Consultants.
During the workshop, participants are involved in three important activities

- **Develop TDRp measures and sample statements for a simple case study.** These exercises will be conducted in small groups to ensure understanding of the concepts and how they are applied in a generic situation.

- **Begin developing TDRp collateral for their organization:** The next activity focuses on identifying Talent outcome, effectiveness and efficiency measures for their own organization (based on the interviews with the Department Head) and developing statements and reports for the most critical Talent processes. These activities help translate the generic information to a live situation and are intended to surface nuances and unique issues that would not be evident in the generic case. After each exercise, the participants will collectively reflect on challenging concepts or applications and share insights on how to overcome potential barriers.

- **TDRp Project Plans.** This activity involves planning for TDRp implementation. Each participant is expected to develop an outline of a TDRp implementation plan (using provided templates) that highlights the steps to gain stakeholder support, identify relevant measures, gain agreement on the contribution of talent programs to the business, gather data and produce reports.
  - **For individuals:** Using an identified program from their firm for a TDRp pilot, participants complete their planning template individually.
  - **For consultants:** Using an identified client who is about to embark on a TDRp implementation, participants will complete their planning documents individually. If they do not have an active engagement at this time, the consultant can identify a past client and/or upcoming client opportunity.

These activities will engage participants, develop critical planning skills and provide the foundation for successful application of the TDRp methodology within their own or a client’s organization.

Each participant will receive a suite of materials to be used to solidify the learning during the workshop and as guides for implementation during the certification process. Workshop materials may vary slightly, depending on the audience. Each participant will typically receive:

- An electronic participant workbook with exercises and exhibits.
- A TDRp job aid on the end-to-end process
- Reference materials including all statements and reports
- The TDRp measures library
- Templates for planning and executing the TDRp implementation.

Note: While the workshop is the first step in the certification process, the workshop is not restricted to certification candidates. Talent practitioners who desire a more comprehensive and detailed understanding of the role of executive reporting in building strong relationships and aligning with the business are welcome to attend.
3. **Webinars**

The in-person workshop is primarily focused on building skills through an interactive experience. The Center has identified four additional areas that are critical for implementation TDRp but which are more conducive to a webinar format.

Certification candidates must attend all four webinars that will be conducted within 4 months after the 2-day workshop. Certification candidates can begin their projects even if they have not yet attended all four webinars. All four webinars must be completed to fulfill the Gate 3 requirements.

- **Webinar 1**: Goal setting
  - **Objective**: Build knowledge and understanding of the goal setting process and its importance to TDRp
  - **Length**: 90 minutes
  - **Topics covered**
    - The purpose of goal setting
    - The need for SMART goals
    - How to develop goals
    - The use of historical data and benchmarks to inform goals
    - Gaining agreement on goals
    - Tips and techniques to set goals to drive behavior

- **Webinar 2**: Data gathering methods and considerations
  - **Objective**: Build knowledge and understanding of considerations in gathering data that yields credible and meaningful executive reports
  - **Length**: 60 minutes
  - **Topics covered**
    - Identifying data sources and reliability
    - Prioritizing data gathering: system source data vs. proxy measures
    - Determining the appropriate level of granularity (establishing demographics and data cuts)

- **Webinar 3**: Forecasting
  - **Objective**: Build knowledge and understanding of the process to forecast performance during the year
  - **Length**: 90 minutes
  - **Topics covered**
    - The importance of forecasting in business planning
    - Considerations of seasonality in forecasting
    - The role of forecasting in TDRp; where forecasts appear on TDRp reports
    - Tips and techniques in developing credible forecasts
- **Webinar 4:** Talent Management processes
  - **Objective:** Build knowledge and understanding of the interplay between the six key Talent Management Processes (Capability Management, L&D, Total Rewards, Leadership, Talent Acquisition, Performance Management) and their impacts on key outcome measures
  - **Length:** 60 minutes
  - **Topics covered**
    » Key and supporting talent processes
    » Key outcome measures and expected impacts on outcomes
    » Implications for Executive Reporting

Individuals who attended the in-person workshop but are not pursuing certification are invited but not required to attend these webinars.

4. **TDRp Certification Application and Sponsor Commitment Plan**
   The purpose of this document is to ensure that the organization is committed to the certification process and has a clear picture of the scope and resources required for implementation. (See the Appendix for the Application)

5. **TDRp Implementation Plan; Change & Communications Plan**
   The TDRp Implementation Plan should be completed after attending the TDRp workshop but before launching into execution of a TDRp implementation. The purpose of the plan is to ensure that the implementation has been well thought out and that the implementation will be focused and purposeful. (See the Appendix for more detail.)

   The TDRp Change & Communications Plan should be completed after attending the TDRp workshop but before launching into execution of a TDRp implementation. The purpose of the Change & Communications Plan is to ensure that the enablers and barriers to change have been considered and that an approach has been clearly defined to remove potential barriers and inhibitors of the implementation process. (See the Appendix for more detail.)

6. **TDRp Work Products**
   Certification candidates are expected to apply TDRp and achieve success with the application of TDRp in their own or a client’s organization. The expectations are clarified below.
   - **Internal practitioners** are required to implement TDRp for a segment (or multiple segments) of the business supporting multiple initiatives that impact multiple business goals. The business unit does not need to be large, but the implementation must be holistic, addressing multiple business goals supported by multiple Talent programs
• **Consultants** are required to implement TDRp with a client in a select area of the client’s organization. As indicated above, the implementation must be holistic and focused on one or more segments of the business with multiple Talent programs supporting multiple business goals.

Validation of the skills is accomplished via submission of specific work products that demonstrate the candidate’s success implementing TDRp in the environments describe above. Work products are detailed here:

- **Progress achieved** with the TDRp implementation and change plans. The Center will evaluate progress when the final work products are submitted. Participants will provide documented evidence of progress on the TDRp Implementation Plan and the Change & Communication Plan. In addition, CTR requires that candidate outline the actual steps taken relative to the plan (sponsor engagement, who engaged, timing and frequency of sponsor discussions, how you established measures, how you reviewed the reports)

- **Creation of a measures library with identified efficiency, effectiveness and outcome measures** for the selected Talent processes (e.g. leadership, L&D, talent acquisition, capability management, performance management, total rewards). TDRp standard definitions must be used or exceptions noted.

- **Three summary (high-level) TDRp statements**: Outcome, Efficiency, and Effectiveness Statements for their own organization, another organization or a client organization

- **Three summary (high-level) TDRp 3 reports**: Summary Report, Program Report, and Operations Report for their own organization, another organization or a client organization

- **Project reflection**: Documented lessons learned and areas for improvement

Certification makes the individual eligible to be listed on the CTR website as a Certified TDRp Professional.

**Maintaining Certification**

Each individual certified by the Center for Talent Reporting must maintain their certification by obtaining at least 10 contact hours over two years on specific topics (to be identified). Continuing education must be from CTR or CTR-approved or accredited organizations.

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1 See the FAQs for more information on this topic
Certification Process: Software Products

Process Flow
The diagram below depicts the end-to-end process for certifying TDRp statements and reports from software vendors and system providers. The six steps are highlighted in the orange circles. Each step is described on the subsequent pages.

Unlike the process for individuals (internal practitioners or consultants), the Software Certification process focuses on the technology solution that will be sold to organizations. While software developers are required to comprehend TDRp and its outputs, certification validates that the software product output conforms to the principles, assumptions, intent and requirements outlined in the TDRp white papers, statements and reports.

Moreover, the goal of this process is to engage CTR early and continuously in the software design and development lifecycle to reduce the time to market and rework costs for software development firms.
Similar to the process for Practitioners and Consultants, the software vendor must pass through the three gates. Whereas Gate 1 is identical for both types of certification, the differences emerge at Gate 2 and 3.

The overall process includes the following steps:

- After passing Gate 1, the software vendor must develop high level specifications for the product along with an implementation plan. CTR will review the specifications and plan to ensure that the product will meet TDR requirements. At this point, the vendor is approved to pass Gate 2.
- After specifications have been approved, the vendor will then develop their product including the identified statements and reports.
- The software vendor will schedule a meeting with CTR to review the statements and reports to ensure they comply with the methodology and specific reporting requirements.
- At this point, CTR will either grant certification or may request modifications to ensure compliance.

**Certification Components**

Certification of a software product TDRp has six major components

1. Pre-work required to prepare for the workshop. This process is identical to the process outlined earlier for individuals [click here]
2. The 2.5-day certification workshop which builds specific TDRp skills. Software developers attend the same workshop for individuals as outlined previously [click here]
3. Attend 2 webinars that provide information on the reporting process relevant to a software development firm. [click here]. Specifically, the two webinars will be required:
   - Webinar 2: Data gathering methods and considerations
   - Webinar 3: Goal setting
4. The completion of the TDRp Certification Application & Sponsor Commitment Plan (See Appendix)
5. The completion of the product specifications and TDRp implementation plan (See Appendix)
6. Develop TDRp compliant software. CTR will review the functionality and features of the TDRp software design and final output to ensure that it complies with the principles, assumptions, inputs and outputs prescribed in the White Papers. **Note:** Software Vendors are not required to produce a TDRp Program report to be certified as TDRp compliant.
   - **Note:** Statements and reports can be certified individually so that an organization can submit statements and reports in any order as they are completed.
   - For example, a company might submit the Summary Report for certification before submitting the Outcome Statement.
Certification makes the organization eligible to be listed on the CTR website as offering TDRp Certified statements and reports.

**Product Compliance**

Software product validation will use a pre-defined checklist to assess compliance with TDRp. This checklist includes the following:

- **The Outcome Statement** must include the following columns:
  - Priority
  - Business Outcomes and Impact of Talent Initiative
  - Unit of Measure
  - Last year actual
  - Plan for current year
  - Results YTD
  - % of Plan

- **The Efficiency and Effectiveness Statements** must include the following columns:
  - Specific measures (with flexibility to group them in a meaningful way)
  - Unit of Measure
  - Last year actual
  - Plan for current year
  - Results YTD
  - % of Plan

- **The Summary and Operations Reports** must include the following columns:
  - Priority
  - Business Outcomes and Impact of Talent Initiative
  - Unit of Measure
  - Last year actual
  - Plan for current year
  - Results YTD
  - % of Plan
  - Forecast

- **A Program Report** is not required for certification

- All Statements and Reports should have the following **standard language**:
  - Under each corporate (business goal), wording should say, “Corporate goal or actual”. Name is changeable by the client
  - Up to 10 business goals can be listed on the statement or reporting
  - Enable listing of up to five Talent initiatives to support the goal
  - Allow up to 5 measures per business goal
  - Efficiency and Effectiveness: allow up to 10 measures in each category
To be certified, high-level Statement and Reports must allow the user to:

- Select or enter the names of appropriate outcome, effectiveness, and efficiency measures
- Enable quantitative, qualitative or proxy measures
- Customize headings for groups of measures
- Change the names when necessary (for example, Level 1 to Participant Feedback)
- Enter the plan and forecast values for the measures
- Accommodate the ability to show multi-year Talent initiatives
- Enable download of report into at least Excel and PDF. Downloaded report can be modified to change names or add headers

Changes to TDRp Standards or Vendor Software

While the basic elements of TDRp are unlikely to change, feedback from practitioners and industry experts will be reviewed quarterly by CTR to determine when and how to evolve the standard.

If or when CTR enhances or modifies TDRp standards, the Executive Director will communicate the changes to certified vendors as well as those are engaged in the certification process but have not yet granted certification.

- The communication will indicate:
  - Which changes are required to be compliance with TDRp
  - Which changes are recommended but not required to maintain certification
- Software vendors will be given up to 18 months to be in compliance with required changes.
- If the software vendor addresses the required but not the recommended changes, CTR will certify the report or statement with a footnote indicating which recommended changes weren’t implemented.

Because vendor software is expected to be enhanced over time as well, it is critical that the software vendor communicates changes to CTR that may affect their compliance with TDRp standards. The software development firm is expected to engage CTR in a follow-up review process to ensure that changes are in compliance with current standards.
Accreditation

Accreditation is available to organizations that have demonstrated a commitment to TDRp reporting and processes. This process, as mentioned earlier, is granted to an institution, not to individuals. In the domain of Talent Development Reporting, the CTR will provide two types of accreditation:

- Firms that do not sell TDRp-related services or software but want to demonstrate excellence in talent reporting and effect a cultural change of running talent like a business.
- Firms that sell consulting services to companies implementing Talent Development Reporting principles.

Talent Organization

Accreditation of a Talent organization is intended for a firm implementing TDRp internally and does not sell TDRp consulting services. Accreditation requires the following:

- At least two employees must have TDRp Professional Certification by CTR
  - The certified employee oversees the implementation of TDRp in a segment of the organization supported by a senior talent leader
  - The organization has a well-documented process to ensure high quality and consistent application of TDR principles
- One of the following must be demonstrated:
  - If TDRp is applied to a single Talent process, (e.g. L&D), the three statements and three reports must include multiple units or regions.
  - If TDRp is applied to multiple Talent processes (e.g. L&D and Talent Acquisition), the three statements and three reports can be generated for a single unit/region. You have two options:
    - Provide individual statements and reports for each Talent process or
    - Provide a consolidated set of statements and reports across all Talent processes.
- TDRp standard definitions have been used for the measures, or exceptions have been noted.
- Submission and approval of a written plan to embed and integrate TDRp into the organization’s processes and culture
- The TDp Sponsor responds annually to a questionnaire (to be designed) that confirms the consistency and integrity of its internal TDRp processes.

Accreditation will be granted to the organization at a level commensurate with the submissions. For example, if an organization submits statements, reports and a plan focusing just on L&D, accreditation will be given for the L&D organization only. If an organization submits statements and reports for all Talent processes and the plan addresses embedding TDRp across all Talent...
processes, the accreditation will be for all of Talent processes. Likewise, the accreditation will reflect the geographic/organizational scope of the plan from a single business unit to the entire enterprise. Accreditation makes the organization eligible to be listed on the CTR website as a TDRp Accredited company.

**Consulting Services Firm**

A company desiring to provide consulting services in TDRp is a special case of the broader organizational accreditation. Many companies will seek help to implement TDRp and it is important that they have qualified consultants to help them.

The following criteria are established for consulting companies who desire to be TDRp Accredited:

- At least two employees must have TDRp Professional Certification
- The consulting company must have assisted at least two clients with a robust TDRp implementation and submit the three statements and three reports from each client. TDRp standard definitions must be used or exceptions noted.
- The consulting organization must have written collateral demonstrating how they will implement TDRp with a client organization. This collateral must be provided to CTR and should include (at a minimum)
  - Implementation methodology
  - Verbiage included in formal statements of work
  - Tools or templates provided to clients during the implementation process
- The consulting organization must also provide contextual information that demonstrates how they will deploy resources and work with clients:
  - If all TDRp consulting will be provided only by employees with TDRp Professional Certification, or if others provide TDRp consulting as well
  - If others will also provide TDRp consulting, identify the oversight process of these employees by those with Professional Certification
  - The role the Certified employee will play in each TDRp engagement

Accreditation makes the organization eligible to be listed on the CTR website as a TDRp Accredited Consulting company.

Because consulting processes can change over time, a Consulting Services organization will need to respond to the questionnaire annually to update the Center on how its processes, approaches or services have changed.

Firms that do not meet CTR requirements can have their accreditation revoked.
Appendix

TDRp Competencies

**Competency Model**

The TDRp certification process is based on a competency model that highlights primary and secondary skills (addressed in the program) and other critical skills that are expected to have been acquired through prior experience or other training programs. The model is depicted below (the ★ designates primary competencies; the + designates secondary competencies).

![Diagram of TDRp Competencies]

The specific skills for each competency are noted in the table below along with the method for acquiring the needed capability.
## Skill Building

### Primary Skills

<table>
<thead>
<tr>
<th>Skill Area</th>
<th>How acquired</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TDRp: Technical Competencies</strong></td>
<td></td>
</tr>
<tr>
<td>Describes the structure of statements and reports</td>
<td>Workshop</td>
</tr>
<tr>
<td>Identifies appropriate measures: efficiency, effectiveness and outcomes</td>
<td>Workshop &amp; Project</td>
</tr>
<tr>
<td>Identifies goals for each measure</td>
<td>Workshop &amp; Project</td>
</tr>
<tr>
<td>Identifies data sources, reliability and availability</td>
<td>Webinar &amp; Project</td>
</tr>
<tr>
<td>Develops a sustainable data collection plan</td>
<td>Project</td>
</tr>
<tr>
<td><strong>TDRp: Situational Competencies</strong></td>
<td></td>
</tr>
<tr>
<td>Identifies the interests of stakeholders</td>
<td>Workshop &amp; Project</td>
</tr>
<tr>
<td>Serves the information needs of intended users</td>
<td>Project</td>
</tr>
<tr>
<td>Identifies the interests and needs of key stakeholders</td>
<td>Workshop &amp; Project</td>
</tr>
<tr>
<td><strong>TDRp: Situational Competencies</strong></td>
<td></td>
</tr>
<tr>
<td>Attends to issues of data use</td>
<td>Workshop and Project</td>
</tr>
<tr>
<td>Attends to issues of organizational change</td>
<td>Workshop and Project</td>
</tr>
<tr>
<td>Applies measurement and evaluation skills to organization and program measurement challenges</td>
<td>Project</td>
</tr>
<tr>
<td>Shares TDRp expertise</td>
<td>Project</td>
</tr>
</tbody>
</table>

### Secondary Skills

<table>
<thead>
<tr>
<th>Skill Area</th>
<th>How acquired</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business &amp; Management</strong></td>
<td></td>
</tr>
<tr>
<td>Analyzes business needs and proposes solutions</td>
<td>Project</td>
</tr>
<tr>
<td>Articulates the drivers of business performance</td>
<td>Workshop &amp; Project</td>
</tr>
<tr>
<td>Develops reports and presentations that yield business insights</td>
<td>Workshop &amp; Project</td>
</tr>
<tr>
<td><strong>Interpersonal skills</strong></td>
<td></td>
</tr>
<tr>
<td>Negotiates skillfully with internal stakeholders</td>
<td>Workshop &amp; Project</td>
</tr>
<tr>
<td>Gains stakeholder support; builds consensus through collaboration</td>
<td>Workshop &amp; Project</td>
</tr>
<tr>
<td>Uses appropriate tools and processes to effectively plan and manage the organization's transition through change</td>
<td>Workshop &amp; Project</td>
</tr>
<tr>
<td><strong>Talent Management Competencies</strong></td>
<td></td>
</tr>
<tr>
<td>Articulates the interplay between six key Talent Management Processes (Capability Management, L&amp;D, Total Rewards, Leadership, Talent Acquisition, Performance Management) and their impacts on key outcome measures</td>
<td>Webinar &amp; Project</td>
</tr>
<tr>
<td>Illustrates the impact of supporting processes on efficiency and effectiveness of primary talent processes</td>
<td>Project</td>
</tr>
</tbody>
</table>
Assumed Prior Knowledge or Acquired Skills

- Interpersonal skills
  - Leadership capabilities
  - Communication: verbal and written
  - Networking & partnering
  - Customer oriented
  - Consultative skills

- Business & management
  - Business knowledge
  - Strategic thinking
  - Driving results

- Personal
  - Adaptability
  - Comfortable with ambiguity
  - Applies professional measurement standards
  - Credibility and integrity

- Project Management
  - Defines work parameters, plans and agreements
  - Identifies required resources (human, financial and physical)
  - Monitors resources (human, financial and physical)
  - Coordinates and supervises others
  - Reports on progress and results
  - Identifies and mitigates problems / issues
TDRp Basics Workshop Overview

Target Audiences

- Practitioner organizations
  - Mid to senior level Talent practitioners
  - Role focused on Talent reporting and/or HR analytics
- Consulting or tools vendors
  - Consultants with a background or expertise in Talent management
  - Experience in HR analytics

Competencies Addressed in the Workshop

- Note: competencies below are numbered and mapped to the workshop modules to ensure they have been addressed during the class

  Primary Skills
  - TDRp: Technical Competencies
    - Describes the structure of statements and reports
    - Identifies appropriate measures: efficiency, effectiveness and outcomes
    - Identifies goals for each measures
  - TDRp: Situational Competencies
    - Identifies the interests and needs of stakeholders
    - Attends to issues of data use
    - Attends to issues of organizational change

  Secondary Skills
  - Business & Management
    - Articulates the drivers of business performance (strategic alignment, goals setting, business plans and disciplined execution)
    - Develops reports and presentations that yield business insights
  - Interpersonal skills
    - Negotiates skillfully with internal stakeholders
    - Gains stakeholder support; builds consensus through collaboration
    - Uses appropriate tools and processes to effectively plan and manage the organization’s transition through change
Assumptions

- Workshop attendees have expertise in at least one Talent function (e.g. Talent Acquisition, L&D, Performance Management)
- CTR doesn’t assume that attendees are coming to the workshop with deep expertise in financial reporting. The Center provides resources and recommended reading for those who do not have the requisite knowledge

Day 1 Agenda

<table>
<thead>
<tr>
<th>Topics</th>
<th>Module Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workshop Kick-off</td>
<td>Kick off and introductions</td>
</tr>
<tr>
<td>Running Talent Like a Business</td>
<td>Articulate the imperative for change</td>
</tr>
<tr>
<td></td>
<td>Describe the components of and are aware of the big picture and can position Executive Reporting within that context</td>
</tr>
<tr>
<td></td>
<td>Articulate the drivers of business performance (strategic alignment, goals setting, business plans and disciplined execution)</td>
</tr>
<tr>
<td></td>
<td>Ensure alignment with the business and links planning and execution</td>
</tr>
<tr>
<td>Executive Reporting</td>
<td>Ensure a solid understand of the goals of executive reporting and its importance to the business</td>
</tr>
<tr>
<td></td>
<td>Ensure participants understand the linkage between TDRp and business reporting</td>
</tr>
<tr>
<td></td>
<td>Ensure understanding of the TDRp framework (bring them back to the framework throughout the workshop)</td>
</tr>
<tr>
<td>Measurement Basics</td>
<td>Ensure a solid understanding of efficiency, effectiveness and impact measures</td>
</tr>
<tr>
<td></td>
<td>Demonstrate the ability to classify specific measures into categories</td>
</tr>
<tr>
<td></td>
<td>Identify why each component is critical to the overall picture of the health of an organization</td>
</tr>
<tr>
<td>TDRp Framework</td>
<td>Articulate the difference between operational and executive reporting</td>
</tr>
<tr>
<td></td>
<td>Describe the flow of data and the relationship of statements and reports</td>
</tr>
<tr>
<td></td>
<td>Describe the appropriate audience for each type of report</td>
</tr>
<tr>
<td>Close Day 1</td>
<td>Homework Assignment</td>
</tr>
</tbody>
</table>
Day 2 Agenda

| Topics                          | Module Objectives                                                                 |
|--------------------------------|==================================================================================|
| **Opening & Review**           | • Reflections from Day 1                                                        |
|                                | • Quiz on Day 1 topics                                                          |
| **TDRp Statements**            | • Describe the TDRp statements                                                   |
| • Competencies: 1, 3, 4, 5     | • Build a statements for a simple case study                                    |
|                                | • Create the skeleton of a high-level statement for their organization          |
| **TDR Reports**                | • Describe the TDRp reports                                                      |
| • Competencies: 1, 3, 4, 5     | • Build a report for a simple case study                                        |
|                                | • Create the skeleton of a high-level report for their organization             |
| **Benefits and Challenges of TDRp** | • Articulate the requirements for change in their organization                  |
| • Competencies: 5, 6, 9, 10    | • Define the barriers and enablers for change                                    |
| **Close Day 2**                | • Homework assignment                                                            |

Day 3 Agenda (Half Day)

<table>
<thead>
<tr>
<th>Topics</th>
<th>Module Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Opening &amp; Review</strong></td>
<td>• Reflections from Day 2</td>
</tr>
<tr>
<td></td>
<td>• Quiz on Day 2 topics</td>
</tr>
<tr>
<td><strong>Managing the Change</strong></td>
<td>• Analyze stakeholder needs and the most effective influencing tactics</td>
</tr>
<tr>
<td>• Competencies Addressed: 5, 6, 11</td>
<td>• Describe the change impacts of implementing TDRp in their organizations</td>
</tr>
<tr>
<td></td>
<td>• Prepare a management of change plan</td>
</tr>
<tr>
<td><strong>Implementation &amp; Action planning</strong></td>
<td>• Identify TDRp project</td>
</tr>
<tr>
<td>• Competencies: 4, 6, 9, 10, 11</td>
<td>• Develop a 2-3 month action plan</td>
</tr>
<tr>
<td><strong>Certification Requirements</strong></td>
<td>• Describe the process flow</td>
</tr>
<tr>
<td></td>
<td>• Articulate their role in communicating with the TDRp Sponsor</td>
</tr>
<tr>
<td><strong>Close Day 3</strong></td>
<td>• Next steps</td>
</tr>
<tr>
<td></td>
<td>• Resources</td>
</tr>
</tbody>
</table>
Certification Objectives
Certification is designed to develop different levels of capability as outlined below.

Reaction Objectives
After learning about the TDRp methodology, participants will rate the process high on:
- The quality and value of the material
- Importance of the TDRp to the organization’s success
- Relevance of TDRp to the organization’s goals
- Intent to implement TDRp within the organization
- Recommendation to others from similar job situations to attend

Learning Objectives
After attending this workshop, participants will be able to:
- Articulate the TDR principles and the benefits to their organization
- Explain the Talent Development statements and reports and why each is important
- Apply the concepts and collateral to a class case study
- Demonstrate competence and confidence in conducting business leader dialogues
- Translate the concepts of TDRp into an implementation approach within their organization
- Identify the enablers and challenges to success within their organization

Application Objectives
After returning to the job environment, participants will:
- Develop a TDRp implementation plan for a select portion of the organization approved by a Senior talent leader
- Conduct business leader discussions to set goals for the impact of learning on business outcomes
- Identify sources of data for TDRp statements and reports including the reliability and availability of data
- Develop a repeatable data collection plan
- Generate Talent Development statements and reports
- Conduct dialogues with senior leaders about Talent efficiency, effectiveness and impacts

Impact Objectives
When TDRp is implemented, the following consequences will be realized:
- Improve the effectiveness and efficiency of the Talent function
- Increase the impact of Talent programs on the business
- Identify opportunities to improve, redesign or enhance programs
- Build productive relationships with clients and executives
- Enhance the influence of the Talent function and its contribution to the organization
### TDRp Certification Application & Sponsor Commitment Plan (Gate 1)

The purpose of this document is to ensure that the organization is committed to the certification process and has a clear picture of the scope and resources required for implementation.

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>TDRp Sponsor Name, Role</td>
<td></td>
</tr>
<tr>
<td>TDRp Project Manager, Role</td>
<td></td>
</tr>
<tr>
<td>TDRp Implementation Team, Role</td>
<td>Team member 1, Role, Role</td>
</tr>
<tr>
<td>What is the focus of certification?</td>
<td>Indicate if individuals to be certified are internal practitioners, will consult with clients or are developing software</td>
</tr>
<tr>
<td>How will the TDRp sponsor oversee the TDRp implementation?</td>
<td>Will implementation of TDRp be a performance goal of the Sponsor?</td>
</tr>
<tr>
<td>Please address each of the items at the right.</td>
<td>How will the Sponsor use the reports to manage the function?</td>
</tr>
<tr>
<td></td>
<td>How will the Sponsor work with his/her business partners and direct reports?</td>
</tr>
<tr>
<td></td>
<td>Is the sponsor willing to conduct the impact discussions with their business partners?</td>
</tr>
<tr>
<td></td>
<td>How will the Sponsor communicate results with their business partners and direct reports</td>
</tr>
<tr>
<td></td>
<td>• Standing agenda item at staff meeting</td>
</tr>
<tr>
<td></td>
<td>• Quarterly one-on-one meetings</td>
</tr>
<tr>
<td></td>
<td>• Other</td>
</tr>
<tr>
<td>Focus and scope of the implementation</td>
<td>What TDRp process will you focus on? (e.g. L&amp;D, Performance Management)</td>
</tr>
<tr>
<td></td>
<td>Will the implementation focus on a single or multiple BUs; will it focus on single or multiple talent processes?</td>
</tr>
<tr>
<td></td>
<td>What is the anticipated level of complexity of your implementation (high, medium, low)?</td>
</tr>
<tr>
<td>Factors that may help or impede the implementation</td>
<td>Please comment here about factors that can serve to accelerate the implementation or those that may pose barriers and impede it.</td>
</tr>
</tbody>
</table>
**TDRp Implementation Plan Templates (Gate 2)**

**Project Planning Overview**
The TDRp Implementation Plan should be completed after attending the TDRp workshop but before launching into execution of a TDRp implementation. The purpose of the plan is to ensure that the implementation has been well thought out and that the implementation will be focused and purposeful.

The plan must include the following:
- Key activities including:
  - Estimated start and end dates
  - Accountability / owner
  - Dependencies (what other tasks or activities does each activity depend on?)
- Milestones which mark the completion of a phase of your implementation. For example, milestones might include:
  - Completion of the measures library
  - Completion of stakeholder interviews
  - Finalizing the efficiency statement

Develop your TDRp Implementation Plan as you would for any project. Identify the appropriate level of detail to:
- Drive accountability
- Highlight dependencies
- Track progress

Certification candidates can use any tool or format for the plan including (but not limited to):
- MS Project
- Excel
- A word template
- A more detailed version the journey table
Content of the Implementation Plan

The TDRp Implementation Plan should include elements of the implementation journey as shown in the graphic below. You can add steps or combine them, but make certain that you have them all covered.

Remember, the goal is not just to collect data that appears on statements or reports but to shift how your organization manages its talent function.

In addition you must include activities that result in a change management plan. These activities should include: (2-3 page plan)

- Creating awareness, understanding and support for TDRp practices
- Assessing your stakeholders and developing a stakeholder management plan
- Building a communications plan
- Developing a risk management and mitigation plan

Many of the tools for this component of the plan were provided at the Workshop.
Implementation Plan Template

The template below has the minimum elements of a plan; add complexity as you deem appropriate.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Timing</th>
<th>Accountability</th>
<th>Dependency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify key stakeholders within HR &amp; the Business</td>
<td>Month 1</td>
<td>TDRp Sponsor &amp; Project Manager</td>
<td>TDRp implementation scope identified</td>
</tr>
<tr>
<td>Conduct interviews with HR &amp; business stakeholder to identify key</td>
<td>Month 1</td>
<td>TDRp Project Manager &amp; select team members</td>
<td>Stakeholders identified</td>
</tr>
<tr>
<td>priorities and measures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Synthesize findings from interviews. Identify potential change issues;</td>
<td>Month 2</td>
<td>TDRp Sponsor, Project Manager and team members</td>
<td>Interviews completed</td>
</tr>
<tr>
<td>review with key stakeholders; revise project scope if necessary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify outcome, efficiency and effectiveness measures and owners</td>
<td>Month 2</td>
<td>TDRp Project team</td>
<td>Findings synthesized and socialized;</td>
</tr>
<tr>
<td>based on interviews</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop measures library (e.g. definitions, availability of data)</td>
<td>Months 3-4</td>
<td>TDRp Project team and data owners</td>
<td>Key measures identified</td>
</tr>
<tr>
<td>Prioritize efficiency and effectiveness measures</td>
<td>Months 3-4</td>
<td>TDRp Sponsor and Project team</td>
<td>Measures library developed</td>
</tr>
<tr>
<td>Meet with owners of key business initiatives to clarify business goals</td>
<td>Month 4</td>
<td>TDRp Sponsor &amp; Project Manager</td>
<td>Measures library complete</td>
</tr>
<tr>
<td>and Talent’s contribution</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meet with owners of key Talent initiatives to clarify Talent efficiency and effectiveness goals</td>
<td>Month 4</td>
<td>TDRp Sponsor and Project Manager</td>
<td>Measures library complete</td>
</tr>
</tbody>
</table>
TDRp Change & Communications Planning Tools (Gate 2)

Change & Communications Planning Overview
The TDRp Change & Communications plan should be completed after attending the TDRp workshop but before launching into execution of a TDRp implementation. The purpose of the Change & Communications Plan is to ensure that the enablers and barriers to change have been considered and that an approach has been clearly defined to remove potential barriers and inhibitors of the implementation process.

The Change & Communications Plan should include the following:
- Key stakeholders
  - Their role in the implementation
  - How they can might advance or inhibit the implementation effort
- Most critical change issues you anticipate in your organization. These could include:
  - Requirement to develop new skills and capabilities
  - Lack of credibility or valued relationships with senior business leaders
  - Unwillingness to adopt new behaviors
  - Discomfort with setting goals
- How you will address potential change issues to minimize their impact on your implementation

Many organizations have adopted a standard change methodology for the organization. We recommend you use your organization’s process, methods and tools if they provide the necessary components to develop your plan. If your organization does not have any formal tools, CTR had provided some templates either during the workshop or in this document. Feel free to use them and modify them as you deem appropriate.

Stakeholder Analysis
A stakeholder analysis helps the TDRp Sponsor and project team to assess the level of support for TDRp before and during the project. This assessment will inform the project plan and can focus the effort to minimize resistance and speed the time to implementation.

Use the stakeholder analysis excel template (or the table on the next page) to identify the following information about each stakeholder

- Step 1: Identify the key stakeholders of the TDRp Implementation, including
  - HR leaders
  - Business leaders
  - Data owners or suppliers (in HR, finance, the business)
- Step 2: Use the Excel file provided to you in the workshop (File name: TDRp templates and tools) or the table below to gather information on each stakeholder
• Step 3: Based on your analysis, identify how best to work with each stakeholder in terms of education, building support and engaging them in the effort

<table>
<thead>
<tr>
<th>Areas to explore</th>
<th>Stakeholder 1</th>
<th>Stakeholder 2</th>
<th>Stakeholder 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>BU, Role, Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stake in TDRp</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decision maker, influencer, SME?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benefits of TDRp to this individual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Potential barriers for this individual (e.g. control, reputation, influence)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Their criticality to the implementation (High, Moderate, Low)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expected involvement (High, Moderate, Low)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current level of knowledge and/or support for TDRp</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Required level of knowledge and/or support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Who could influence them to provide more support for the effort</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other comments</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Stakeholder Analysis Example**

See the example below of a populate stakeholder analysis

<table>
<thead>
<tr>
<th>Name</th>
<th>Role/Title</th>
<th>Organization</th>
<th>Stake in this project and/or care abouts from this project</th>
<th>What benefits can this Stakeholder derive from this effort?</th>
<th>What might the stakeholder lose as a result of this effort?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yuri E. Stone</td>
<td>CEO</td>
<td>Corporate</td>
<td>Believes the organization's success will be influenced significantly by the ability of the organization to attract, motivate and retain store personnel. Tracking success of strategic human capital programs is seen as essential.</td>
<td>Leading indicators of the organization's ability to meet its sales growth and expense reduction goals. Ability to quickly course correct and reallocate resources to strategic initiatives.</td>
<td>Yuri has little to lose. As the CEO, this is critical for his success.</td>
</tr>
<tr>
<td>Rachel Tang</td>
<td>VP of Talent</td>
<td>Corporate</td>
<td>Assurance that the Talent function has aligned its priorities to the business. The ability to demonstrate where and how Talent is contributing</td>
<td></td>
<td>Rachel might discover that the Talent function is not as efficient or effective as she believes.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>How critical to the success of this project? (High, Moderate, Low)</th>
<th>Expected level of involvement in the implementation? (High, Moderate, Low)</th>
<th>Rate his/her current level of support</th>
<th>Rate the level of support you need from him/her</th>
<th>Decision maker, influencer, SME?</th>
<th>Who influences this individual? Or who do they influence?</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yuri E. Stone</td>
<td>High</td>
<td>Moderate</td>
<td>High</td>
<td>High</td>
<td>Decision maker</td>
<td>Influences Chris, Pat and Jordan to participate in this effort. Reports to Yuri and can be a key advocate for TDRp.</td>
<td>Rachel's involvement is key to ensuring that there is a handshake between the business and her Talent function. She will be essential to ensuring that the needed data is provided for the statements and reports</td>
</tr>
<tr>
<td>Rachel Tang</td>
<td>High</td>
<td>High</td>
<td>Moderate</td>
<td>High</td>
<td>Influence</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Change and Communications Plan
The Change and Communications plan will enable you to manage your implementation more smoothly and more predictably.

Use the template below to flesh out your Change & Communications Plan.

<table>
<thead>
<tr>
<th>Components</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify your key TDRp stakeholders</td>
<td></td>
</tr>
<tr>
<td>Based on your interviews or other information, identify your organization’s readiness to implement TDRp</td>
<td></td>
</tr>
<tr>
<td>Based on your readiness assessment, identify how you will scope your TDRp implementation to ensure success</td>
<td></td>
</tr>
<tr>
<td>Based on your stakeholder analysis or interviews, identify how you will work with these stakeholders to build and sustain their support</td>
<td></td>
</tr>
<tr>
<td>Identify potential areas of resistance in the organization</td>
<td></td>
</tr>
<tr>
<td>For each area above, identify how you can mitigate the impact of the potential resistance</td>
<td></td>
</tr>
<tr>
<td>Identify how you are going to socialize, communicate and build a broad base of support for TDRp in the organization</td>
<td></td>
</tr>
<tr>
<td>Identify how you will assess the effectiveness of your communication and organizational change readiness</td>
<td></td>
</tr>
<tr>
<td>Identify how frequently you will revisit the change plan to ensure that you are on track</td>
<td></td>
</tr>
<tr>
<td>Other considerations/comments</td>
<td></td>
</tr>
</tbody>
</table>
Certification and Accreditation Pricing

Certification Pricing

Certification is priced in two segments:

- The workshop will continue to be priced as a standalone product which is $1,295 for members and $1,595 for non-members
- Certification Webinars will be free
- Individual certification fee
  - $695 if the Sponsor commitment plan is submitted **within 3 months** of attending the workshop
  - $995 if the Sponsor commitment plan is submitted **more than 3 months** after attending the workshop
- Software product certification fee:
  - $1,295 if the Sponsor commitment plan is submitted **within 3 months** of attending the workshop
  - $1,595 if the Sponsor commitment plan is submitted **more than 3 months** after attending the workshop

Accreditation Pricing

The pricing for Accreditation has not yet been determined. Pricing will vary based on the scope, breadth and depth of the implementation across the organization. The Center will develop an Accreditation pricing model in 2014.
Frequently Asked Questions

**Training Process**

- **Question:** Do participants have to attend the webinars in person?
- **Response:**
  Each webinar is conducted live and repeated three times per year. The Center recognizes that not all participants will be able to attend the sessions live. Consequently, select webinars may be recorded and a link will be made available to attendees of the workshop. Because the Center does not have a method to track ‘attendance’ of a recorded session, attendees will be on the honor system to make CTR aware that they have listened to the session.

**Recertification Cycle and Tracking**

- **Question:** What is the cycle for recertification?
- **Response:**
  The Center has determined that the initial cycle for recertification will be two years. Consequently, the first wave of individuals applying for recertification will occur in 2016. This cycle may change to a three year cycle in the future.

  - **Question:** What additional development or training with CTR offer to enable recertification?
  - **Response:**
    The Center plans to deploy two educational opportunities for TDRp-certified candidates:
    - A TDRp advanced workshop to address more advanced implementation considerations. This workshop will be piloted in 2014 for broader deployment in 2015
    - A course on Business Acumen for HR Professionals. This course is slated for the 2014-2015 timeframe.