

The background image shows a conference room from the perspective of someone seated at a table. In the foreground, a table is set with a white tablecloth, a lit candle in a glass holder, and a small vase of flowers. Several people are seated at tables in the room, facing away from the camera towards a large screen at the front. The room is lit by several ornate chandeliers with multiple light bulbs. A large potted plant is visible on the left side of the room.

# The Customer Institute Guidelines for Conferences, Awards, and Certifications

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# Customer Centricity Community Guidelines for Conferences, Awards, and Certifications

## Introduction

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The Customer Centricity practice around the globe benefits from a lively community of *practitioners*<sup>1</sup>, *consultants*<sup>2</sup>, *solution providers*<sup>3</sup>, *conference organizers*<sup>4</sup>, *awards organizers*<sup>5</sup>, and *certifying institutions*<sup>6</sup>.

To establish a minimum of transparency in the interaction of these players and ensure profound value creation for all participants, the Customer Institute issues the following guidelines.

## Guidelines for **Conferences** in the Field of Customer Centricity

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Conferences are an important opportunity for the community to learn, share best practices, and network. Conference organizers are a valuable part of the CX community. They add value through their effort to curate relevant content, promote the event to participants, and organized the physical or virtual forum for participants to engage with the content.

While we take it as a given, that delegates to a conference will receive the quality insight and networking opportunities that were promised to them in the agenda, in the sense of full transparency in this value creation we recommend:

1. **Content** presented by *consultants*, *solution providers*, or *others* who have paid a fee for their participation should be clearly marked as “sponsored content” in the agenda.

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<sup>1</sup> *Practitioners* are employees in the field of customer centricity at organizations striving to become more customer centric. They are neither consultants nor solution providers to the customer centricity community.

<sup>2</sup> *Consultants* are experts in the field of customer centricity who provide advice for a fee to practitioners.

<sup>3</sup> *Solution providers* develop technology, tools, education, or other solutions to help improve customer centricity and offer them for a fee to organizations and practitioners.

<sup>4</sup> *Conference organizers* curate content and present it to the customer centricity community via physical or virtual events.

<sup>5</sup> *Awards organizers* provide a collection of criteria and judges and utilize it to identify and award excellence in customer centricity.

<sup>6</sup> *Certifying institutions* provide a collection of criteria and review methods and utilize it to benchmark and certify individuals, tools, methods, or institutions.



2. The **value of such sponsored content** for the conference audience should be clearly stated in the conference agenda.

As a service to the customer centricity community, the Customer Institute offers to endorse conferences that meet the criteria above for free on an ongoing basis (endorsing means ensuring that the criteria are met on a trust basis and communication such endorsements on the Customer Institute website and on the conference organizers' collateral). If you are a conference organizer and would like to have your event endorsed by the Customer Institute, please visit [www.customer-institute.org/endorsement](http://www.customer-institute.org/endorsement) (site not live until these guidelines go into effect).

### Guidelines for **Awards** in the Field of Customer Centricity

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The identification, recognition, and celebration of excellence in customer centricity is an important part in the advancement of the industry as a whole. *Award organizers* make a significant contribution to this advancement.

In the sense of full transparency in this contribution we recommend:

1. To help advancing best practices in the field of customer centricity, related awards must have **clearly defined criteria** for the evaluation of entrants.
2. For full transparency, the **criteria** for awards should be **publicly communicated**.
3. The allow the evaluation process to be impartial, all **fees for entrants** must be prepaid and non-refundable, independent of the outcome of the awards.
4. **Honorary awards** that do not require some or all of the communicated requirements to be met (e.g. those handed out by sponsors to selected clients) should be clearly marked and communicated as "honorary" or "sponsored" awards.
5. If the evaluation of entrants happens through judges, then the **criteria for judge selection should be publicly communicated**.
6. The selection of judges must be based on meeting the published qualification criteria. If a judging fee is charged, this fact should be transparent to the judges, participants, and the community.
7. If **presentations** are delivered during the awards event, the same content guidelines as for *conference organizers* apply.



## Guidelines for **Certifying Institutions** in the Field of Customer Centricity

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Certifications are one way of confirming that a certain situation meets criteria that are important for third parties, e.g. knowledge acquired, best practices met, benchmarks exceeded. Certifications can be awarded for big and small things; they can be difficult or easy to achieve.

However, in the sense of full transparency in certifying we recommend:

1. The **reviewing body** (e.g. a review board, individuals, public institutions, etc.) should be clearly mentioned.
2. The certification **criteria** must be publicly communicated.
3. The **certification document** (e.g. the certificate) should clearly communicate the prerequisite and the outcome of the criteria met, e.g.
  - Has participated in a 2-hour online course and successfully passed a test on the fundamentals of the Net Promoter Score concept.
  - Has participated in a two-day CX masterclass and acquired fundamental knowledge about customer experience management.
  - Has met the criteria of A, B, and C and proven to be a leading best practice in the field of XYZ.
4. A potential **fee for candidates** should be prepaid and non-refundable, independent of the outcome of the certification.

## Contact the Customer Institute with Feedback on these Guidelines

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These guidelines have been issued to promote transparent advancement of excellence in the field of customer centricity. If you have any comments or questions, please contact us at [office@customer-institute.org](mailto:office@customer-institute.org).

Version: January 1, 2021 – this version replaces all previous versions of these guidelines.