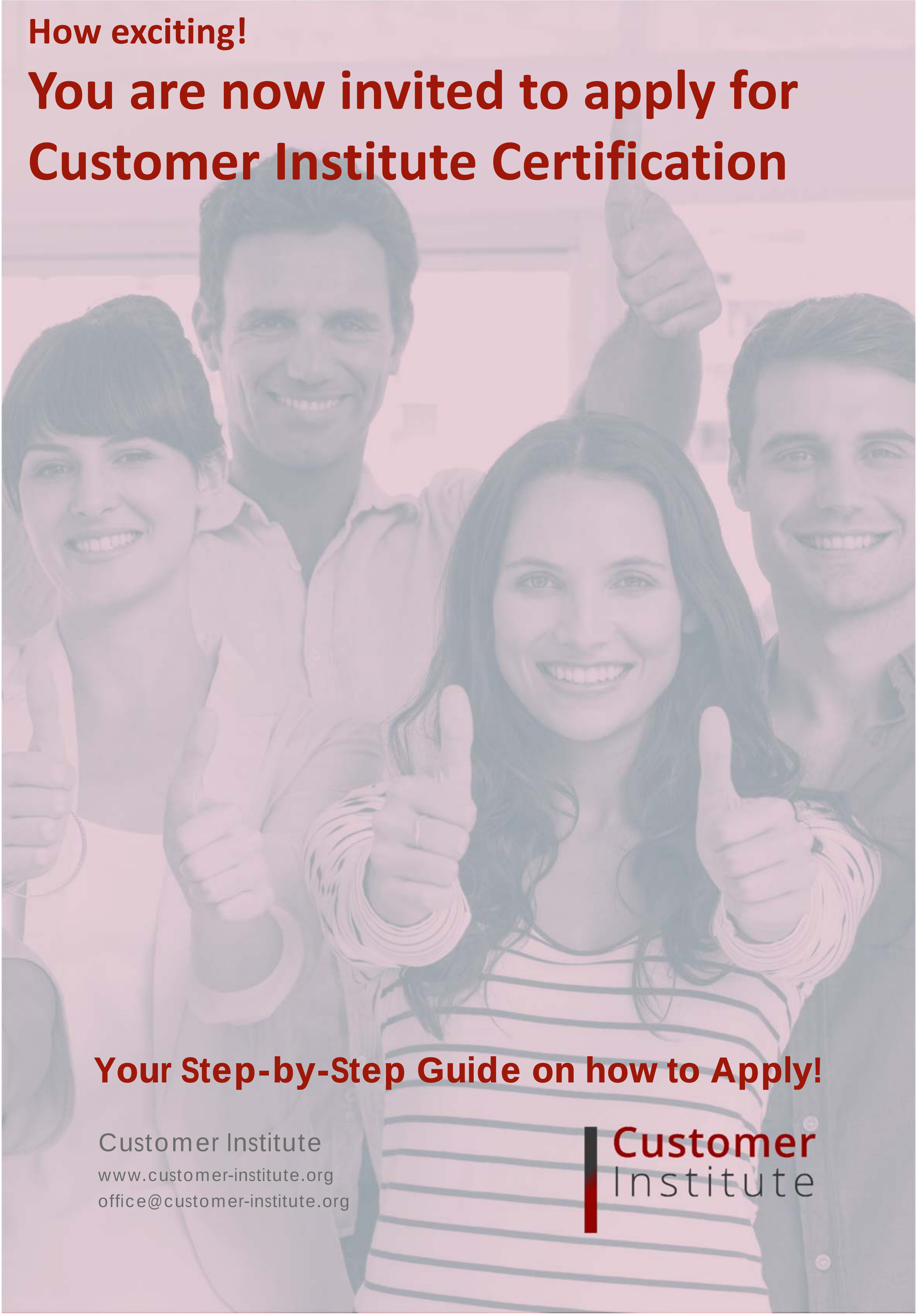
How exciting!

You are now invited to apply for Customer Institute Certification



Your Step-by-Step Guide on how to Apply!

Customer Institute
www.customer-institute.org
office@customer-institute.org

An Exciting Moment

Today is a special moment! Over the past days or weeks, you have expressed your interest in a Customer Institute certification and have told us about what you would like to get certified.

We can now confirm that your tool, method, training, or training provider are eligible for certification pending a thorough review by a Customer Institute review board.

So, let's go ahead and submit your material! We are here to help you with each step on the path ahead. This guide will provide you with all the information you need for the application and the next steps. Whenever you run into any questions or have any comments, let us know at certifications@customer-institute.org!

Your Application Portal

Our certification application process is automated for your convenience. Please go to
https://customer-institute.org/certification-application
and enter the invitation password you were provided via email together with this brochure.

As Easy as One-Two-Three

Next, you will fill in the 14 fields in our application tool. **On the last page of this brochure** you find **step-by-step help for each field** of the form.

Please submit your material in English! If the original material is in another language than English, then feel free to use an automatic translation tool (e.g. deepl.com or onlinedoctranslator.com) and submit both, the original and the machine translated English version. Less than perfect translation into English will not negatively impact your certification scoring!

When you are done, make sure, everything is correct and click "submit". A message on your screen will confirm that everything has been safely received (or if something is missing in your submission).

One small step for our tool, but one giant leap for you and us toward the certification of your material!

What Happens after you Submit

Once your application material has been received, we will get really busy. Please expect the following steps to happen shortly after we receive your application:

We will now invoice you for the certification fee and await payment for our invoice *

Once we have received payment, we will be in touch to schedule the review board meeting

A few days after the review board meeting you will receive the review report and learn if your solution passed

If the solution passed, you will receive the certificate and a corresponding badge to display.

* no invoices will be issued for fee certifications during our free certification promotion 2020.

Invoices

In our application tool you can provide us with all information required to invoice your organization including uploading a purchase order (optionally). For free certifications during our 2020 free certification promotion we will – of course – not issues invoices.

The Review Board Meeting

Next, we will be in touch to schedule the review board meeting with 3-5 members from our board of directors.

The (virtual) review board meeting lasts for about 2 hours and consists of

- Your presentation of your material – around 45 minutes
- A question and answer session for the directors to ask their questions – around 30 minutes
- An internal discussion for which you will be excused from the meeting to allow for any internal discussion allowing the directors to finish their scoring – around 45 minutes
- An offline period after the review board meeting of 48 hours for the directors to finish and submit their scoring and comments.

The Scoring

The review board will score your solution based on the following criteria:

1. **Contribution to industry practices in customer centricity.** The extent to which your solution is using current, proven, yet innovative approaches that comply with current industry best practice or advance the same.
    a. Conformity & completeness:
    Follows common customer centricity practices
    b. Innovation:
    Complements existing best practices and tools, i.e. offers innovative elements or ways of application

2. **Fitness for purpose & use.**

    The extent to which your solution, in its current state of development, will deliver the stated results and/or outputs in all the defined situations in an efficient and effective manner.
    a. The effectiveness of solution will consistently support the achievement of the desired results / outputs in all the in-scope situations
    b. The efficiency of the solution will guarantee minimum wasted effort or expense in achieving the desired results / outputs

3. **Predictability & accuracy.**

    The extent to which the solution, in its current state, can be used to deliver the stated results and/or outputs predictably and accurately in all the defined situations.
    a. The solution follows a structured approach from problem statement to solution
    b. All the components of the solution follow a logical sequence.
    c. The underpinning design and structure of the tool or method will – if reliably applied – consistently deliver predictable and accurate results / outputs in all the in-scope situations.

4. **Sustainability & repeatability.**

    The extent to which the certification object lends itself to be duplicated in the targeted environments by any competent practitioner and that its use will remain viable over time.
    a. The tool or method is documented in such a way that makes its uses repeatable and potentially allows it to be adopted by other competent practitioners.
    b. The tool or method is designed in a way that allows for sustainable use over the time.
    c. The tool or method is flexible enough to be used in different environments yet within the defined scope.

Some additional requirements for training providers

If you seek certification as a Customer Institute Certified Training Provider, then you must – in addition to the criterial above – meet the following criteria:

- A minimum of two customer centricity related courses must meet the criteria above
- One of the two must be a basic CX masterclass type and one must be an advanced course focusing on detailed aspects of customer centricity (e.g. ROCX, customer journey mapping, customer strategy, etc.)
- The training institution must have a voice-of-the-customer program in place to frequently collect feedback from trainees.
- The training institution must have a quality assurance program in place that takes feedback from the VoC program into consideration.
- The training institution must have a proven track record of delivering customer centricity related training.
- The customer centricity related courses must be developed by industry practitioners with sufficient content and didactical experience.
- There must be a minimum of two trainers available to deliver the training. Both must have sufficient industry and training expertise to effectively educate trainees on the topic of customer centricity.
- There must be a business continuity plan in place to deal with unforeseen disruptions impacting trainings.
- Terms and conditions of the training provider need to provide fair rules for interaction with trainees; a conflict resolution process must be in place.

Please target your presentation to these criteria

To make your experience in the review board meeting as rewarding as possible, please target your presentation of the submitted material to the criteria above, i.e. making sure that the review board members can conclude compliance from what they learned about your solution.

Intellectual Property and Confidentiality

Your know-how and expertise are safe with the Customer Institute. The Customer Institute and its review board do not acquire any form of intellectual property in the certified material. The material remains your sole intellectual property.

Excluding Directors from your review board meeting

In the application process (field 15) you can block up to three directors from your review board for competitive reasons. Even though all directors are bound by confidentiality, there might always be that one person who works a bit too closely to your region or field of business. We are happy to accommodate any concerns you might have and give you that option to exclude selected individuals from your case.

Please note that excluding directors can have an impact on when we can schedule your review board meeting. We kindly ask for your understanding, that we do not communicate the composition of your review board prior to the review board meeting.

The Exciting Moment: Receiving the Results

A few days after the review board meeting you will receive a report about the certification review. In this report you will learn:

- The score achieved and whether this score won you a certification or not.
- Comments and recommendations from the review board on how to improve your solution potentially further.

An open word about passing or failing

Please note that the initial certification fee is not dependent on the outcome of the certification process (this does not apply to certifications as part of our 2020 free certification promotion).

If the Customer Institute review board rejects the certification, we will provide you with a detailed report on where the material does not meet the certification criteria.

In such cases you can benefit from a discounted rate of 1,500 Euro (single) or 2,500 Euro (multiple) for a rerun of your certification within 3 months of the initial certification attempt. During our 2020 free certifications promotion, you can benefit from one free-of-charge re-certification attempt within three months after the initial review board meeting.

If you Achieved Certification

If your review score exceeds the threshold for certification, then it’s time to celebrate!

We here at the Customer Institute will ring a bell, open a bottle of champagne, and toast to yet another example of excellence in customer centricity acknowledged!

We will then send you your certificate together with a digital certification badge for display on your digital properties. Additionally, you receive a complete scoring overview as well as a summary of all directors' comments regarding your case. This has proven to be a valuable source of insight for our candidates as they continue to further improve their solutions.

We will also reference your solution on the Customer Institute website to the extent you chose during your application (full public or shortened non-public).

Certification Validity

The Customer Institute certifications are valid **worldwide** (unless prohibited by law). The certifications are **valid for two years** beginning from the date of certification.

At the end of your certification's validity, you can either remove all references to the Customer Institute certification from your publicly facing assets, or you can benefit from **attractive discounts for a streamlined re-certification** of your material to make sure it still meets current industry best practices.

Contact Us

Have we left any of your questions unanswered? Then please let us know and contact us at **certifications@customer-institute.org**

Customer Institute

A Step-by-Step Guide for our Application Tool

We hope to be really intuitive in what we ask for in our application tool at https://customer-institute.org/certification-application

But just to be sure, here is a detailed guide to each field of the form:

#	Field	Why do we ask this	Notes
1	Name of entity	This name will appear on the certificate and the invoice will be issued to this entity.	Make sure to add the complete name you want to see on the certificate, e.g. ACME Services, LLC
2	Billing address	We will invoice the certification fees to this address	If you would like the invoice to go to another entity than in field #1, then just add the entity name for the invoice here in the address field. No invoices will be issued for certifications as part of our 2020 free certification promo. In that case enter “n/a”.
3	VAT Ident No	We need this number for all EU entities for invoicing	If you are a non-EU entity or for certifications as part of our 2020 free certification promo enter “n/a”.
4	First name	To be in touch with you	
5	Last name	Ditto	
6	Title	To know your role	e.g. CX Manager, CEO, Intern
7	Email	To communicate with you	All information will be sent here
8	Name of solution	This will appear on the certificate and on the reference of passed certifications on our website.	Make sure to add the complete name you want to see on the certificate, e.g. CX Masterclass. Make sure to not add confidential information, since this will be referenced on our website.

#	Field	Why do we ask this	Notes
9	Description	This will appear on the reference of passed certifications on our website.	Make sure to not add confidential information, since this will be referenced on our website.
10	Logo	This will appear on the certificate and – if you choose a public certification – on the reference of passed certifications on our website.	
11	Files for review	These are the files you submit for the review board meeting.	You can upload up to four files. If you need more, zip them into one and upload the zip-archive. You can include confidential information in these files, they will only be used for the review board meeting and remain your sole intellectual property.
12	Public or not	Your choice of publishing key parts or your solution will earn you a 50% discount.	If you choose "Not publicly available" then we will only reference an anonymized short description on our website. If you choose "Publicly available", then we will ask you to provide a PDF case summary containing at least around 50% of the review material for publishing on our website.
13	Purchase Order	If you would like to provide a PO for invoicing, here is where you can do it.	This is optional for entities with respective procurement policies.
14	Reference	We would like to understand how word-of-mouth travels	Please let us know where you heard about our certifications.
15	Excluding Directors from your Review Board	Would you like to EXCLUDE any directors from your review board meeting for competitive reasons?	You can exclude up to three directors. Please note that excluding directors can have an impact on when we can schedule your review board meeting. We kindly ask for your understanding, that we do not communicate the composition of our review board prior to the review board meeting.