PDA International

DISCOVERING & EMPOWERING TALENT

PDA
Personal Development Analysis

Handbook for the PDA Trainers Certification and Follow-up Process

PDA UNIVERSITY

Introduction

With the purpose of accompanying the international growth of the business, PDA International understands that it is key to accelerate and facilitate training to new PDA Analysts around the world. Likewise, it is essential to achieve and maintain the high quality standards of the PDA Seminars taught worldwide.

To train, prepare, monitor and ensure the correct transfer of know-how to PDA Trainers, we have developed the **PDA Trainers Certification and Follow-up Process**.

The purpose of this process is to ensure not only an orderly and successful procedure that guarantees the correct transfer of know-how, but also to help generate, consolidate and keep a dynamic and close relationship with certified PDA Trainers. The objective of this procedure is that it helps guide the training and development of PDA Trainers and also apply an effective follow-up of their growth.

PDA Trainers, certified by PDA International through the **PDA Trainers Certification and Follow-up Process**, are the only individuals authorized to organize and dictate PDA Assessment training seminars and certify PDA Analysts. Once Consultants are certified as PDA Trainers, they'll be able to organize and run PDA Analyst Certification Seminars. After being trained, PDA Trainers receive a certificate and are registered in the PDA Trainers Registry. This PDA Trainers Registry is the basis of the PDA Trainers Panels, which we will refer to later. The purpose of the PDA Trainers Panel is to help consolidate and keep a dynamic and close relationship with PDA Trainers. Also, it will help them be updated as to the adjustments in the PDA Trainers Certification Process, improvements in the PDA materials, new features on the PDA Platform, as well as new Reports of Chapters developed for the PDA Assessment.

It is important to clarify that only PDA Train the Trainers (hereinafter, PDA TTT), can train PDA Trainers. PDA TTT are exclusively staff of the PDA Consultancy Department at PDA International, and they are the only people who can certify PDA Trainers.

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The following steps will lead to a successful PDA Trainers Training Program.

A. Who can certify PDA Trainers?

PDA TTT will train and certify the level of knowledge of PDA Trainers by following and respecting the steps described in this PDA Trainers Certification Process.

It is important to clarify that PDA Trainers cannot train and certify other PDA Trainers.

In order to perform as a PDA TTT, PDA Trainers must be authorized by PDA International and appear on the PDA TTT Registry.

PDA International will certify as PDA TTT those professionals who have acquired, through study and experience, a solid knowledge of the PDA Assessment. In addition, in order to become a PDA TTT, they must have dictated, as PDA Trainers, at least 10 PDA Analysts Certification Seminars and shown good communication, consulting and HR skills.

The following is the structure proposed by PDA International:

- **Level 1: PDA Analyst**. This person knows the theoretical basis and history of the development of the tool. The PDA Analyst administers PDA Forms, reads and interprets PDA Reports and Graphs in depth, and also offers advice to others and applies the information provided by the PDA Assessment.

- **Level 2: PDA Trainer.** In addition to what PDA Analysts can do, PDA Trainers can train and certify PDA Analysts. They'll also be able to provide additional support. PDA Trainers are responsible of the knowledge and skill of the PDA Analysts they certify.

- **Level 3: PDA TTT.** In addition to what PDA Analysts and Trainers can do, PDA TTT can train and certify PDA Trainers following the steps described in the PDA Trainers Certification and Follow-up Process. PDA TTT are responsible of the knowledge and skill of the PDA Trainers they certify.

- **PDA Consultant: PDA Analysts,** PDA Trainers and PDA TTT can also be trained and certified in the different activities of the PDA Consultancy Department, which are described in the PDA Consultancy Portal.

B. PDA Trainer Certificate Validity

To keep the validity of the certification, PDA Trainers must only meet the following requirements:

- Keep qualification levels at an acceptable level. Through the PDA Trainers Panel, there will be follow-up to said indicators, and a constant relationship will be maintained with PDA Trainers in order to help them keep such indicators above the acceptable levels.

- To keep the quality of the PDA Seminars, it is important that PDA Trainers dictate at least one PDA Seminar every six months. If a PDA Trainer exceeds such period without teaching a Seminar, it is recommended that the PDA Trainer contacts PDA International in order to revalidate the Certificate.

C. PDA Trainers responsibilities

PDA International requires that the people who apply and use the PDA Assessment are duly trained and certified as PDA Analysts. This implies that those who administer the PDA Forms, read and interpret PDA Reports and Graphs, made decisions or offer advice to others based on the information delivered by the PDA Assessment, must be PDA Analysts. To be certified, they must participate in a PDA Analysts Certification Seminar, which is led by a PDA Trainer whose responsibility is to train the future PDA Analyst and ensure and certify that the person has achieve the expected and necessary level of knowledge. This requirements seeks to ensure that those who use the PDA Assessment achieve the complete and correct interpretation of the information, maximise the uses and quickly recover the investment they've made in PDA.

Through PDA Analysts Certification Seminars, PDA Trainers will train and certify the level of knowledge of PDA Analysts regarding:

- ➢ History of the development of the tool and the PDA Assessment

- ➢ Theoretical grounds and basis

- ➢ Uses and applications of the PDA information

- ➢ Graphs and Reports interpretation

- ➢ Administration of the online platform

It is important to take into account that the PDA Trainers must be 100% prepared to dictate and coordinate PDA Analysts Certification Seminars. This means that, despite the fact that the Seminar can be organized and coordinated by a team of individuals, the PDA Trainer must offer advice to the team regarding the logistics, invitations, participants' confirmations, printing of materials and all the aspects related to the activity.

D.   Basic requirements

To achieve and keep a high quality standard in PDA Analysts Certification Seminars worldwide, PDA International considers that is essential to know and assess the profile of those who desire to be certified as PDA Trainers. Once it is decided that the conditions are met, the process may be initiated.

1)   PDA Analyst Certification

In order to be trained and certified as PDA Trainer, it is essential that the future PDA trainer be certified as PDA Analyst. In case the person already is a PDA Analyst, training as a PDA Trainer can be initiated. On the contrary, the person must first be trained and certified as PDA Analyst.

PDA Analyst training and certification can be made through face-to-face or remote PDA Analyst Certification Seminars. Remote Seminars can be made via Skype or WebEx.

2)   Experience in Consultancy

The second requirement is that the future PDA Trainer must be an HR professional and have experience in leading courses and seminars. The future PDA Trainer must also possess good communication skills so as to perform successfully as PDA Trainer.

3)   Experience in the use and interpretation of the PDA Assessment

The third requirement is to possess solid knowledge of the PDA Assessment, and it is important that the person has experience in the use and application of the tool. It is key and valuable that PDA Analysts, before being trained as PDA Trainers, have gone through field experiences in the application and interpretation of the PDA Assessment. It is necessary that they have participated in Individual PDA Feedback sessions and has experienced the use of the PDA Assessment in HR processes.

E. Training the PDA Trainer

The purpose of this stage is to prepare future PDA Trainers so that they co-lead a PDA Analysts Certification Seminar with the PDA TTT.

The future PDA Trainer must have read and studied the PowerPoint documents PDA Analysts Certification Seminar – notes and Guide for the Seminar. Both documents will be send by the PDA TTT prior to the training conference call. This stage is carried out by the PDA TTT, takes about half day and is divided into three steps:

1) <u>Review of the PDA Analysts Certification Seminar PowerPoint</u>

This stage mainly refers to the contents of the activity. It consists on making an exhaustive and detailed revision, one slide at a time, of the PowerPoint of the Seminar. During this revision, the PDA TTT must ensure that the future PDA trainer consistently dominates the knowledge of each subject.

The PDA TTT will review all the subjects: theories, PDA Axes and in-depth interpretation indicators. The PDA TTT must ensure that the future PDA Trainer dominates the concepts, and can also share experiences, cases, examples, stories or situations that allow "going beyond what the slide says". An important aspect to explain to the new PDA Trainer is which information, value, Axis, combination of Axes or combination of other Indicators, each indicator of the PDA Graph arises from. Always keep in mind that the purpose is to prepare PDA Trainers so that they can lead PDA Analysts Certification Seminar with the PDA TTT in front of a group.

2) <u>Review the document Guide for the PDA Analysts Certification Seminar</u>

This stage refers mainly to the organisation and activity. The PDA TTT is responsible for reviewing the contents of the Guide for the PDA Analysts Certification Seminar. This document describes aspects related to the organisation, sending emails, materials, actions to be carried out by the future PDA Analysts before attending an activity (Preliminary Reading Material and e-learning), logistics and equipment, exercises, Satisfaction Survey and PDA Analysts Registry, etc.

3) <u>Configuration of the PDA Trainers Registry</u>

During this stage, the PDA TTT asks PDA Trainers for their **email address, scanned signature and photograph** in order to configure the PDA Trainers file in the PDA Trainers Registry. Future PDA Trainers should provide this information to the PDA TTT before initiating the joint Certification.

This aspect is important because, as will explained below, after the Joint Certification Seminar concludes, PDA Analysts will receive their Certificates signed by the new PDA Trainer.

The email address must be updated so that PDA Trainers are included in the PDA Trainers group mailing. It is fundamental that PDA Trainers receive updates with news about the PDA Seminars, materials, processes and other general matters of their role as PDA Trainers. PDA International developed an email address that includes all PDA Trainers. All news will be sent to this address.

F. First joint certification

This consists of the organisation, coordination and dictation of a PDA Analysts Certification Seminar carried out by the PDA Trainer and PDA TTT.

The vital purpose of this activity is to prepare PDA Trainers for the responsibility of certifying new PDA Analysts. To achieve this, the PDA Analysts Certification Seminar must be led by the new PDA Trainer with the support of the PDA TTT.

To reduce the level of exposure, guarantee the activity's success and achieve both objectives, it is important that this activity be taught to between three and five participants.

It is divided into three steps:

1) <u>Preparing the Seminar</u>

The PDA TTT will be responsible for working with future PDA Trainers in the preparation and coordination of the activity. Together, they will prepare the materials for the activity (PPT, exercises and practical cases), the materials for participants (PPT, manuals, practical cases, exercises, laminated sheets, etc.), and those aspects related to logistics (invitations, room, technology, projector, coffee breaks and lunches). PDA Trainers will only concentrate in their responsibility of facilitating contents and guiding activities and exercises.

2) <u>Declaring the Seminar</u>

PDA Trainers must enter the PDA Trainers Panel and declare the Seminar in the "Seminars" section by entering the personal information (first name, last name, company, email address) of the participants that have confirmed their attendance to the Seminar. Such information is stored in the PDA Trainers Panel with the

purpose of keeping an updated PDA Analysts International Registry. It is very important that PDA Trainers declare their Seminars and that PDA Analysts complete the Satisfaction Survey, since this information allows PDA International to keep an updated record of PDA Analysts and follow-up PDA Trainers. If PDA Trainers don't declare the Seminar and don't register new Analysts in the PDA Trainers Panel, participants won't appear on the PDA Analysts International Registry, won't receive their PDA Analyst Certificate, and could have trouble when opening bases on the PDA Platform and when receiving consulting support. In addition to this, they won't be able to access the PDA Consultancy Portal nor participate in the training activities offered by PDA University.

3) <u>Dictating the Seminar</u>

PDA Trainers concentrate on the PPT and PDA TTT will provide their support when going over cases, examples, exercises and potential deeper and more complex explanations. PDA TTT must allow space for mistakes and not interrupt. Adjustments and corrections must be made during breaks or lunch, in private.

4) <u>PDA Certificates and PDA Analysts Registry</u>

Once the training activity concludes, and when the PDA Trainer, with the PDA TTT, have certified the participants who reached the expected level of knowledge of the PDA Assessment, the new PDA Analysts will be requested to complete the Satisfaction Survey and registration in the PDA Analysts International Registry by accessing the following link: pdaanalystregistration.pdainternational.net.

Participants access this link and register in the PDA Analysts International Registry by entering their personal information. Then, the process guides them so that they can respond to a brief Satisfaction Survey. The system automatically generates the PDA Analyst Certificates and emails them, in PDF format, to all new PDA Analysts.

If participants were unable to complete the survey and register online after the certification seminar, the PDA Trainer with the PDA TTT will email the request and link to them. If participants haven't completed the survey a week after the Seminar, the PDA Trainer should send them a reminder to enter the platform.

G. Closing, review and consolidation

This meeting will take about two hours and the PDA TTT is accountable for it.

The materials required for this stage are the Guide for the PDA Analyst Certification Seminar and those of the PDA Analysts Certification Seminar. This meeting will take place after the joint Certification Seminar.

1) Review of the activity and contents

In this meeting, the PDA Trainer and PDA TTT will review, on one hand, the dynamics of the activity and, on the other, the aspects related to the organisation and logistics thereof.

When reviewing the dynamics of the activity, the PDA TTT must allow space for the new PDA Trainer to comment doubts and then clarify them. Finish up and clarify aspects related to the contents, and also make a brief revision of the exercises.

When reviewing the aspects related to the organisation and logistics of the activity, the following subjects will be covered: such as invitation emails, participants' confirmations, Preliminary Reading Material, PowerPoint files, manuals, Declaring the PDA Analysts Certification Seminar, Satisfaction Survey and PDA Analyst International Registry, among others.

2) Reinforcing the Declaration, Satisfaction Survey and Trainers Panel

At this stage, the PDA TTT will work with the PDA Trainer on the importance of the Satisfaction Survey, Trainers Panel and intention of achieving and keeping high quality standards in PDA Analysts Certification Seminars worldwide.

New PDA Trainers must understand that, with the purpose of receiving feedback from the PDA Analysts they'll certify, they'll have to comply with the Declaration of the Seminar, Satisfaction Survey and Trainers Panel.

PDA TTT must explain that all the information gathered from the Declaration of Seminars and Satisfaction Surveys is automatically uploaded to the Trainers Panel and that, based on the displayed results, PDA International will drive training actions and suggestions.

In case PDA Trainers wish to develop their consulting profile and achieve a deeper and more exhaustive level of knowledge of the PDA Assessment, that is, become a PDA Consultant, they'll be able to enroll in the PDA University. PDA Consultancy is responsible for the PDA University.

3) <u>Materials and updates</u>

At this stage, PDA TTT inform and train PDA Trainers on the Trainers Zone and provides the corresponding user name and password so that the new PDA Trainer can access the Trainers Zone. It a PDA Trainer doesn't have a user name and password, he/she can request it by emailing: <u>pdaseminar@pdainternational.net.</u>

PDA TTT should explain the importance of displaying and keeping a formal and corporate image throughout the documents and materials used in PDA Analysts Certification Seminars.

Remind new PDA Trainers that all the documents and materials required for organising and dictating PDA Analysts Certification Seminars are available online at the Trainers Zone <u>http://www.pdainternational.net/en-US/ConsultancyPortal/ZonaTrainers.aspx</u> in the PDA Consultancy Portal (<u>http://www.pdainternational.net/en/consultancyportal/ConsultancyPortal.aspx</u>). These documents will be updated, so we suggest PDA Trainers to access the site periodically and use the latest version.