



**ATP**  
Innovations  
in Testing  
2013  
Ft. Lauderdale, Florida

## Developing a Performance-Based Board Review Test


### Factors and Considerations



## Agenda


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- Certification positioning & overview
- Key design considerations
- Pre-development activities
- Development process
- Alpha/Beta testing
- Board members
- Implementation & rollout
- Continuous improvement
- Q&A

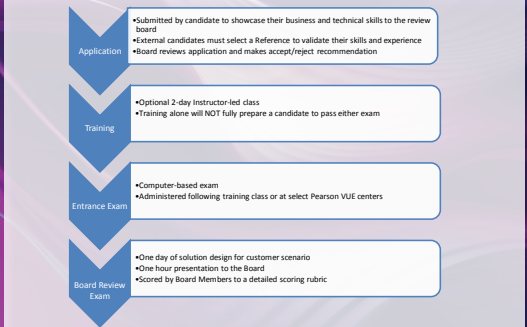


## Certification Positioning Overview


- HP Master Accredited Solutions Expert (Master ASE) certification level
- Audience profile
- Background and skills
- Why a Board Review?




## Candidate Path




- Application**
  - Submitted by candidate to showcase their business and technical skills to the review board
  - External candidates must select a Reference to validate their skills and experience
  - Board reviews application and makes accept/reject recommendation
- Training**
  - Optional 2-day Instructor-led class
  - Training alone will NOT fully prepare a candidate to pass either exam
- Entrance Exam**
  - Computer-based exam
  - Administered following training class or at select Pearson VUE centers
- Board Review Exam**
  - One day of solution design for customer scenario
  - One hour presentation to the Board
  - Scored by Board Members to a detailed scoring rubric



## Key Design Considerations



Business Requirements	Exam Requirements
Cost	Valid & reliable
Scalability	Passing criteria
High visibility	Application process
Ease of process	Logistics & delivery
Benefits & rewards	Retake & expiration
Candidate commitment	Regional customization
Board selection & commitment	Exam security & integrity



## Pre-development Activities

Recommendations	What HP did
<ul style="list-style-type: none"> <li>■ Secure a Psychometrician</li> <li>■ Identify competencies</li> <li>■ Secure subject matter experts (SMEs) for development team                             <ul style="list-style-type: none"> <li>• Review roles and expectations</li> </ul> </li> <li>■ Develop schedule</li> <li>■ Define scope of exam                             <ul style="list-style-type: none"> <li>• What need is it filling</li> <li>• Visions for the exam</li> <li>• Audience</li> <li>• Positioning</li> <li>• Funding (development &amp; ongoing)</li> <li>• What is it vs. what it is not</li> </ul> </li> <li>■ Recruit and invite initial board members to participate                             <ul style="list-style-type: none"> <li>• Review the time commitment and expectations</li> </ul> </li> <li>■ Determine staffing and support required</li> </ul>	<ul style="list-style-type: none"> <li>■ Contracted Psychometrician</li> <li>■ Conducted competency modeling workshop</li> <li>■ Obtained both internal &amp; external SMEs</li> <li>■ Researched list of outstanding questions</li> <li>■ Created initial board from subset of SMEs</li> <li>■ Allocated exam development manager</li> <li>■ Obtained additional part time resource for support and planning</li> </ul>

### Pre-development Activities

#### Recommendations

- Secure a Psychometrician
- Identify competencies
- Secure subject matter experts (SMEs) for development team
  - Review roles and responsibilities
- Develop schedule
- Define scope
  - Build more time into schedule than anticipated
  - Allow more time to fully scope the exam design and answer outstanding questions
  - Ensure multiple SME points of view early in the process
  - Set expectations and confirm commitment of the team
  - Confirm continuity of a core SME group for entirety of project
- Recruit and train
  - Review the time commitment
- Determine staffing and support requirements

#### What HP did

- Contracted Psychometrician
- Conducted competency modelling workshop

**What would we change?**

### Scenario Situation Documents

#### Recommendations

- Identify pre-work opportunities
- Determine how to represent a real-world situation
  - Create outlines and drafts
  - Brainstorm document types, communication materials, accessibility to information
  - Determine how to replicate tools and resources that would typically be available
- Carve out time to develop final materials in a workshop setting

#### What HP did

- Conducted pre-work remotely
  - Scoped requirements
  - Outlined what was needed
  - Drafted documents
- Held in-person development workshop
  - Solidified pre-work
  - Drafted scenario packet documents
  - Validated documents using additional SMEs
  - Drafted scoring rubric

### Scenario Situation Documents

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### Finalize Scoring Rubric

#### Recommendations

- Develop scoring method/rubric
  - Identify competency and solution scoring components; regardless of scenario
  - Determine scoring sections and criteria points
  - Identify any mandatory skills
- Cut score
  - Determine cut score approach
  - Determine how to weight multiple judge's scores

#### What HP did

- 5 sections (Presentation, Business, Technical, Software, Services)
  - 49 individual scoring points
- 4 mandatory skills
- Independent cut score per section
- Candidate must achieve the cut score on all 5 sections
  - 3 out of 5 judges or
  - Average across judges

### Finalize Scoring Rubric

#### Recommendations

- Develop scoring method/rubric
  - Identify competency and solution scoring components; regardless of scenario
  - Determine scoring sections and criteria points
  - Identify any mandatory skills
- Cut score
  - Start simpler, fewer score levels
  - Plan for very iterative process; required more iterations than planned.
  - Plan schedule to have a complete draft scoring rubric ready for the Alpha test
- Determine how to weight multiple judge's scores

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### Sample Scoring Criteria

	Not Qualified	Minimally Proficient	Expert Qualifications
<b>Business skills</b>	Does not address business issues	Somewhat addresses business issues, including some finance (minimum of CapEx and OpEx)	Addresses the customer business issues and demonstrates the value an HP solution brings to the customer, including financial justifications
<b>Technical skills/ Software/ Services</b>	No solid architecture proposal; unclear or proposal is not feasible	Presents a vague proposal; presents a partial solution	Presents a comprehensive proposal showing the total HP solution and demonstrates its value for the customer
<b>Presentation skills (communication and non-verbal skills)</b>	Poor (example: does not introduce himself or herself, ineffective use of presentation media, distracting behavior)	Acceptable (example: Introduces himself or herself with basic information. Somewhat effective use of presentation media, keeps the audience engaged)	Acceptable to fantastic (example: introduction is comprehensive. Modifies delivery style and materials as needed during the presentation)

**Alpha Test**

**Recommendations**

- Determine type of alpha required
  - In-person versus remote
  - Scope and expectations of alpha
- Strive to provide the most complete set of documents and scoring rubric possible
- Scope security requirements
  - Access
  - Document packet
- Determine strategy and method for collecting feedback
  - Documentation packet, inaccuracies
  - Process
  - Experience
  - Rubric

**What HP did**

- Remote alpha
  - Via Skype
  - Secure document access
- Limited scope
  - 2 participants
  - No hardware provided
- Scaled down preparation time
  - High level, unpolished delivery
- Debrief sessions for feedback

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**What would we change?**

- Plan for a full, in-person alpha instead of a limited remote version.
- Conduct a comprehensive alpha that includes planned equipment and environment plus latest version of all documents, rubric, and scoring

**Beta Test**

**Recommendations**

- Plan a full and comprehensive beta
- Include "final" equipment and environment configurations, documents, rubric, and scoring
- Consider scheduling a beta 1 and beta 2 for thorough candidate testing
  - May depend on Alpha type and outcome
- Determine strategy and method for collecting feedback

**What HP did**

- Planned a full, comprehensive beta
  - 10 candidates, in-person
  - First test of equipment
- Instead, conducted two "rounds" of beta test
  - 1st presentations did not yield what we expected. Made immediate adjustments.
    - Added more directions, expectations, and format
    - Clarified goals and how to achieve them
    - Clarified how the training related as a resource for the test
- 2nd presentations very successful, but tired SMEs and Board Members
  - Refined question and answer process
  - Provided some scoring detail
  - Adjusted laptop configuration and tools

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**What would we change?**

- Alter Alpha/Beta plan and schedule to allow an additional in-person test delivery session.
- Plan the final beta to be as much like the live, roll-out version as possible, including all "final" equipment and environment configurations, documents, rubric, and scoring

**Board Members**

**Recommendations**

- Determine requirements
- Develop application/selection process
- Establish expectations, terms and commitments
- Determine board makeup (internal, partners, customers)
- Thoroughly train board on process, document packet, scoring rubric, behavior and protocol

**What HP did**

- Selected initial members from SME pool
- Require new board members to first achieve the certification
- Saw a high interest in becoming a board member
- Implemented process to apply to join the board
  - If accepted, members sign Terms & Commitment agreement
- Use 3 internal and 2 external board members for each session
- Provided training for process, additional scenarios, rubric, roll-playing, and Q&A session

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**What would we change?**

- Plan on maintaining at least double the number of board members needed
- Spread members across different managers and partner organizations

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## Implementation & Rollout

### Recommendations

- Determine rollout strategy
  - Regions, phases, languages
- Identify planning support and resources required
- Scope Security Requirements
  - Scoring Rubric (what is confidential vs. public)
  - Equipment
  - Environment
  - Document versions

### What HP did

- Rolled-out Americas and European regions
- Conduct English-only training and exam
- Maintain a 6 month planning window
  - Required by logistics: multiple rooms and configurations, equipment and materials, accessible locations
- Secured one part-time resource to manage the program process
- Locked down laptops
- Created multiple scenarios
- Proctored preparation environment
  - No mobile phones, pagers, outside materials

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### What would we change?

- Ongoing challenge when planning sessions without knowing number of candidates
- International shipping of equipment (customs)
- Storage of equipment
- Sessions at the end of a fiscal quarters create conflict and divert from closing sales

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## Continuous Improvement

### Recommendations

- Anticipate continuous updates
- Grow the scenario pool
- Develop a feedback strategy
- Continually add new board members
- Develop process for results that are challenged

### What HP does

- Implement continuous dynamic updates
- Easily roll in new changes
- Provide more feedback on failures and retakes
  - Mentoring for retakes
  - Strength and areas for improvement notes
- Maintain a dedicated support mailbox
- Record candidate presentations
- Retain hard and soft copy records

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## Questions & Answers

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## Thank You!