Trusted Skills

Professionals Certifying Professionals

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MOUNT ROYAL UNIVERSITY
Institute for Community Prosperity

In 2022, proximity to natural resources is no longer the driver of a city's competitive advantage. Instead, a city's ability to attract, develop, and retain talent (the people who will live and work there) is the greatest predictor of social and economic prosperity. Since 2020, numerous studies have explored the challenges and opportunities facing Calgary's labour force.

- The first report, *Calgary on the Precipice*, released in 2020, defined five strategic pillars to accelerate Calgary's adaptive capacity.

- In 2021, Calgary Economic Development sponsored the first comprehensive audit of Calgary's skills ecosystem. This audit identified an ecosystem incorporating 3,000 organizations, providing 31,000 programs and 3.5 million experiences annually. However, it found that 81% of programs provided no path to skill certification.

- In 2021/22, Calgary Arts Development Authority (CADA) is leading the development of Calgary's creative economy strategy. This draft strategy identifies two priorities: (1) a need to expand Calgary's creative capacity; and (2) a need to facilitate a more inclusive creative economy.

A common theme emerging from these reports is a fragmented skills ecosystem, lacking the underlying structures to support harmonization. The result is a system that is neither optimized nor inclusive.

In 2022, CADA is sponsoring a prototype of a skills certification system that decouples skill development from skill certification. The goal is to explore whether decoupling facilitates potential certification pathways for non-certified programs. If so, this offers the potential to unlock significant underrecognized capacity. This project will prototype four certifications in the creative occupation of marketing.

At this stage, we are sharing this draft project summary with a small group of community stakeholders for review and feedback. You may provide feedback through one of two channels:

1. Book a one-on-one virtual meeting to review.
2. Send feedback to the project team via email.

Thank you for your ongoing support!

Regards –

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Executive Summary

The ability to attract, retain, and develop world-leading talent will define the future of Calgary. However, today few skills have a rigorous and recognized certification. To de-risk this process employers adopt various informal methods, such as references and educational proxies. Yet, many informal methods embed a systemic bias that limits the ability to tap the potential of our diverse labour market. For example, only 21% of executive positions in Calgary are held by women; similarly, only 9% of board positions are held by those from racialized communities.

So how do we unlock the potential of every Calgarian and the organizations supporting skill development?

Our answer is the **Trusted Skills professional certification**. Today, the most valuable skills are not an outcome of a single program at university or one job. Skills sit at the intersection of all these experiences and more. *Trusted Skills professional certification* aims to remove judgement and recognize that every Calgarian took a different path. It focuses on the outcome — the evidence of each person's skill. Today, this model has been adopted across the skilled trades, varying professional fields, and motor vehicle licensing.

To explore the potential of this model in unlocking Calgary's potential, Calgary Arts Development Authority (CADA) is funding a prototype of *Trusted Skills professional certification* in the creative economy occupation of **marketing.**

Three questions guide this project:

1. Is there perceived value in *Trusted Skills professional certification* by employers, individuals, and talent developers?

2. Does the *Trusted Skills professional certification* facilitate greater inclusivity by reducing employer dependency on informal methods?

3. Can *Trusted Skills professional certification* be sustainably scaled?

Pilot Scope

The project will prototype four *Trusted Skills professional certification*s in the creative occupation of marketing.

The project will run from **December 2021 to December 2022.**

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Project Governance Committee

We would like to recognize and thank members of both our project governance and young professional advisory committees for providing guidance during the development of the program.

Member	Affiliation
Patti Pon (sponsor)	President & Chief Executive Officer Calgary Arts Development Authority
Dr. AnneMarie Dorland (Co-chair)	Assistant Professor, Mount Royal University
Dr. David Finch (Co-chair)	Professor & Senior Fellow, Institute for Community Prosperity Mount Royal University
Lee Ackerman	Director, Principal Catalyst, SAIT Catalyst Group
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Pablo Franco	Manager, Career & Employment Services Centre for Newcomers
Kim Gordon	Project Coordinator & Chair, Young Professionals Advisory Committee
Jeff Griffiths	Partner, Workforce International
Nicole Hamilton	Dean, Alberta University for the Arts
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Janet Lane	Director, Human Capital Centre Canada West Foundation
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Cassidy Makus
Emily-Anne Nelson
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Unlocking Calgary's Potential

Defined by *Trusted Skills*

For 40 years, economic, social, and cultural factors such as advanced technology and globalization have changed how cities compete to attract new citizens. A city's proximity to natural resources is no longer the driver of its competitive advantage. Instead, a city's ability to attract, develop, and retain talent (the people who will live and work there) is the greatest predictor of social and economic prosperity. How cities grow and develop their talent pool is crucial. Today's workplaces demand that people can live with uncertainty, adapt to new roles, and learn new skills quickly. These skills transcend industries and professions. If there were such a thing as a defining skill, it would be adaptability.

Adaptable people can adjust to the dynamic context of the world today. Adaptability can be reactive, like how many are learning to live in a new reality during the COVID-19 pandemic. However, adaptability can also be proactive and intentional, characterized by anticipating change and planning our response.

A city's adaptive capacity is anchored in the ability of its labour force to meet increasingly dynamic demands for new skills.[1] Thus, our challenge is to develop citizens who can professionally thrive in a turbulent and dynamic world.[2] To improve Calgary's adaptive capacity, we must become a city that develops talent faster and better than others.

Numerous recent studies, including the CityXLab's Calgary on the Precipice, the Business Council of Alberta's Skilled by Design: A Blueprint for Alberta's Future Workforce, and the Government of Alberta's, Vision 2030 paradoxically identify that Calgary and Alberta are facing both a talent surplus and talent deficit.[3] As the next step in examining this supply–demand mismatch, in early 2021, Calgary Economic Development commissioned a year-long audit of Calgary's talent ecosystem.

The audit helps to understand the current base of talent and the potential to optimize the existing ecosystem to meet the emerging opportunities and challenges facing our community. Adopting a holistic lens, this audit looks at talent development, viewing certified, non-certified, and informal talent development as part of a fully integrated ecosystem (Figure-1).

To examine the talent ecosystem alignment, the audit comprised three separate but complementary studies:

> **Study 1** analyzes 12 months of Calgary-based hiring data (n=13,510) to isolate current and emerging priority skills.

> **Study 2** analyzes the most recent Statistics Canada data on Calgary's existing base of skills, including postsecondary completion rates and fields of study.

> **Study 3** analyzes existing certified and non-certified programming offered by Calgary's talent ecosystem.

This audit finds that Calgary's talent ecosystem incorporates over 3,000 organizations, providing 30,000 programs annually. These talent developers transcend the for-profit, non-profit, and public sectors, with the majority being smaller enterprises based in Calgary. It concludes that adaptive talent is no longer defined by a life stage, classroom, or textbook; rather, adaptive talent is purpose-based, prioritizing personal exploration, experimentation, and enabling skills that transcend industries and sectors. Therefore, if
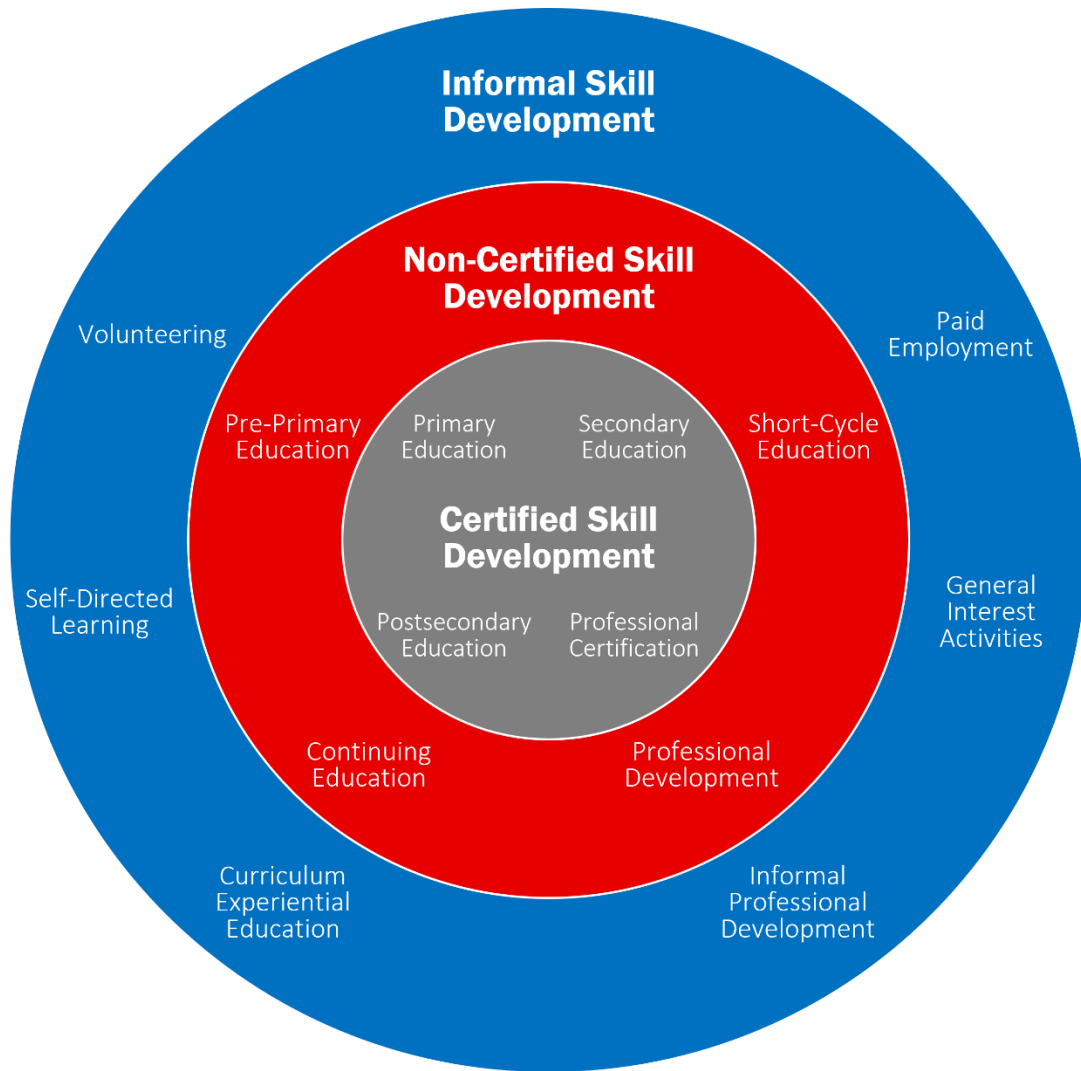
Figure-1: Talent Development Ecosystem

Calgary's goal is to be a city that adapts faster and better than others, it must develop mechanisms to optimize these thousands of talent development experiences into a harmonized citizen-centric ecosystem.

The audit identifies challenges in harmonizing the talent ecosystem, including a lack of shared purpose and jurisdictional alignment. This report focuses on three specific inter-related challenges and operationalizes one of the audit recommendations.

Challenge 1: The Trust Gap

Skill certification incorporates a rigorous process confirming that an individual has a defined combination of aptitude, ability, knowledge, and skills. Certification is often integrated with a talent development process in a model defined as integrated certification. Integrated certification became the dominant model because all skills certification is rooted in the rigour, trust, and legitimacy of the process and the body certifying the skill. For this reason, skills are often certified by government or professional bodies, such as provincially accredited education (e.g., diplomas, degrees), forms of professional certifications (e.g., medical licensing, professional engineering), and proprietary credentials (e.g., Cisco certifications).

However, infinite ways to develop skills exist, including formal education, endless forms of self-directed learning, and on-the-job experience. The ecosystem audit found that only 19% of talent development programs in Calgary incorporate a path to skill certification.
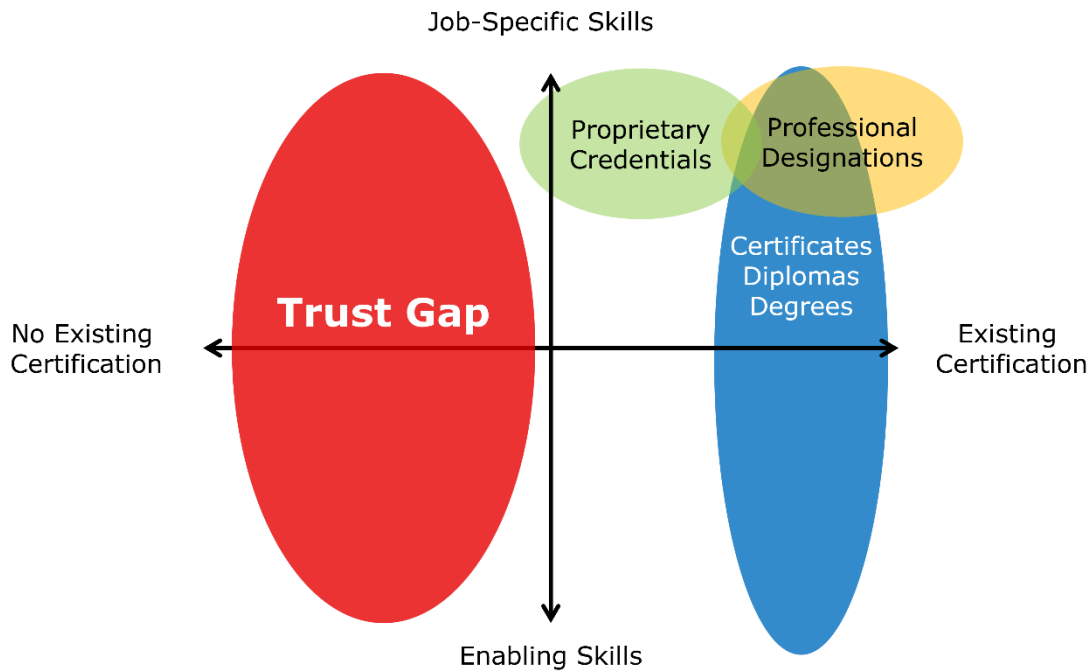
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Figure-2: The Trust Gap

Figure-2 is a perceptual map of the trust gap. Specifically, the audit found a significant gap in certifying enabling skills, which are foundational and allow individuals to transition across various contexts (e.g., problem-solving, collaboration, communication). The skill audit found that the demand for enabling skills is two times that of job-specific skills.

Challenge 2: Risk Management

The hiring process involves some of the highest risk decisions an employer makes. Employers look to de-risk this process by asking for specific forms of skill certification considered relevant to a role.

The most common are specific educational credentials. However, they also request specific professional credentials. These credentials confirm in advance that a candidate has certain skills.

Yet, as identified, the trust gap amplifies the risk to employers. In a study profiled later in this report, we found that 96% of employers adopted informal methods to de-risk hiring, with the majority adopting reference-checking. On average, employers in this study adopted a combination of three informal methods to manage hiring risk.

Challenge 3: Systemic Bias

Employers adopting informal methods to bridge the trust gap is a logical risk management response. However, decades of research demonstrate that hiring is already filled with bias and prejudice.[4] This systemic bias limits the potential of our city. For example,

- Women in Canada represent 5% of CEOs.[5]

- In Calgary, 20% of executive positions are held by women. The lowest of the major cities.[6]

- Women represent 21% of board positions in Alberta.[7]

- Though 40% of Calgary's labour force is from racialized communities, they represent 9% of board positions.[8]

- Indigenous peoples and those from the LGBTQ2+ communities have non-existent representation on boards.[9]

- Equally qualified ethnic minority candidates must submit 50% more resumes than non-minority candidates to be invited for an interview.[10]

- 61% of Calgarians believe we are not accepting of people from diverse backgrounds.[11]

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Reinventing Skill Certification

Overcoming these interdependent challenges requires dramatically expanding skill certification across the full ecosystem, including non-certified and informal talent development.

One strategy would be to expand integrated certification into non-certified programming. However, the scope of this expansion into thousands of organizations and programs risks diluting the rigour, trust, and legitimacy essential to certification. Moreover, informal talent development, from employment experience to self-directed learning, cannot be recognized efficiently through an integrated model.

A second strategy is called decoupled certification. Decoupled certification separates the development of a skill from the certification of a skill (Figure-3). An example of this is a driver's licence. The confirmation of an individual's skill to drive an automobile is fully decoupled from how they developed the skill to drive. This decoupling unlocks capacity, driving both scale and rigour. For example, there are over 3.1 million licensed drivers in Alberta today. If an automobile driver's license adopted an integrated model, there would be a single path to learning how to drive (e.g., a mandatory government driver's course) followed by a defined skill criterion. Conversely, the decoupled model focuses only on the certification criteria, defined by one factor: Does the candidate meet the minimum criteria to receive a license to drive? The individual defines the development of this skill. For example, some may learn to drive with a family member, take a course, or choose a combination of both.

This decoupling model has been adopted by a range of professional fields and skilled trades. A critical dimension of decoupling is anchoring the rigour, trust, and legitimacy of the body certifying the skills. Therefore, employers do not have to evaluate the legitimacy of the infinite number of pathways or organizations that contribute to a candidate's skill. Instead, they focus solely on the body's legitimacy that certified their skill.

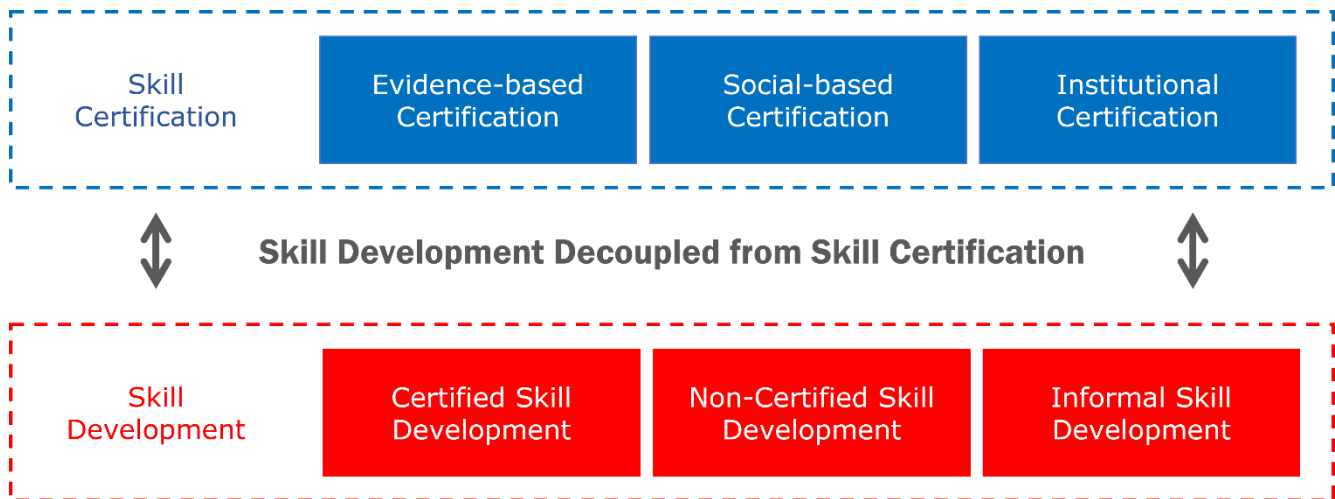The following section reviews a decoupled *Trusted Skills professional certification* system.

Figure-3: Decoupling Development from Certification

Trusted Skills professional certification

Building from Best of Class

Introducing a new skill certification system is exceptionally complex. Fortunately, numerous benchmarks support the development of the new *Trusted Skills professional certification* system. Program examples include:

Red Seal Program for interprovincial trades

Islamic Banking & Finance Institute Malaysia

Nursing Council of New Zealand

World Education Services

Building on these and others, *Trusted Skills professional certification* is defined by five principles:

Principle 1: Bridging the Gap

Trusted Skills professional certification must be driven by current and emerging local labour market demand. *Trusted Skills professional certification* is designed to enable different professional fields to identify skill trust gaps and provide a consistent, efficient, scalable, and rigorous path to developing skill certification. The goal is to establish an agile certification system to bridge trust gaps, <u>not</u> compete with existing certification systems.

Principle 2: Decoupled Certification

Trusted Skills professional certification is decoupled from direct talent development pathways. The goal of *Trusted Skills professional certification* is to verify an individual's skill level, by recognizing and unlocking the infinite pathways to developing this skill.

Principle 3: Trust and Legitimacy

The success or failure of all certifications is rooted in rigour, trust, and legitimacy. Therefore, the *Trusted Skills professional certification* processes, including establishing the criteria, the process to verify a skill, and the expertise of the *Trusted Skills certified reviewer*, will comply with ISO 17024 standard.

Principle 4: Scaffolded

Trusted Skills professional certification is scaffolded to recognize basic, advanced, and expert skills.

Principle 5: Accessible and Sustainable

Trusted Skills professional certification must be designed to be both accessible and sustainable. Accessibility reflects a need to ensure that *Trusted Skills professional certification* is open to all Calgarians, regardless of background or financial ability. Concurrently, the program must be designed to be economically sustainable. Economic sustainability is contingent on both individuals and employers perceiving value in *Trusted Skills professional certification*. Therefore, employers must recognize the value of a candidate having *Trusted Skills professional certification* during the hiring process, which generates an added incentive for an individual to invest in securing their *Trusted Skills professional certification*.

The Value Proposition

The conceptual model of *Trusted Skills professional certification* derives three critical benefits:

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Drives Trust: Unified city-level brand is essential to drive awareness and signal trust and legitimacy.

2. Does the *Trusted Skills professional certification* facilitate greater inclusivity by reducing employer dependency on informal
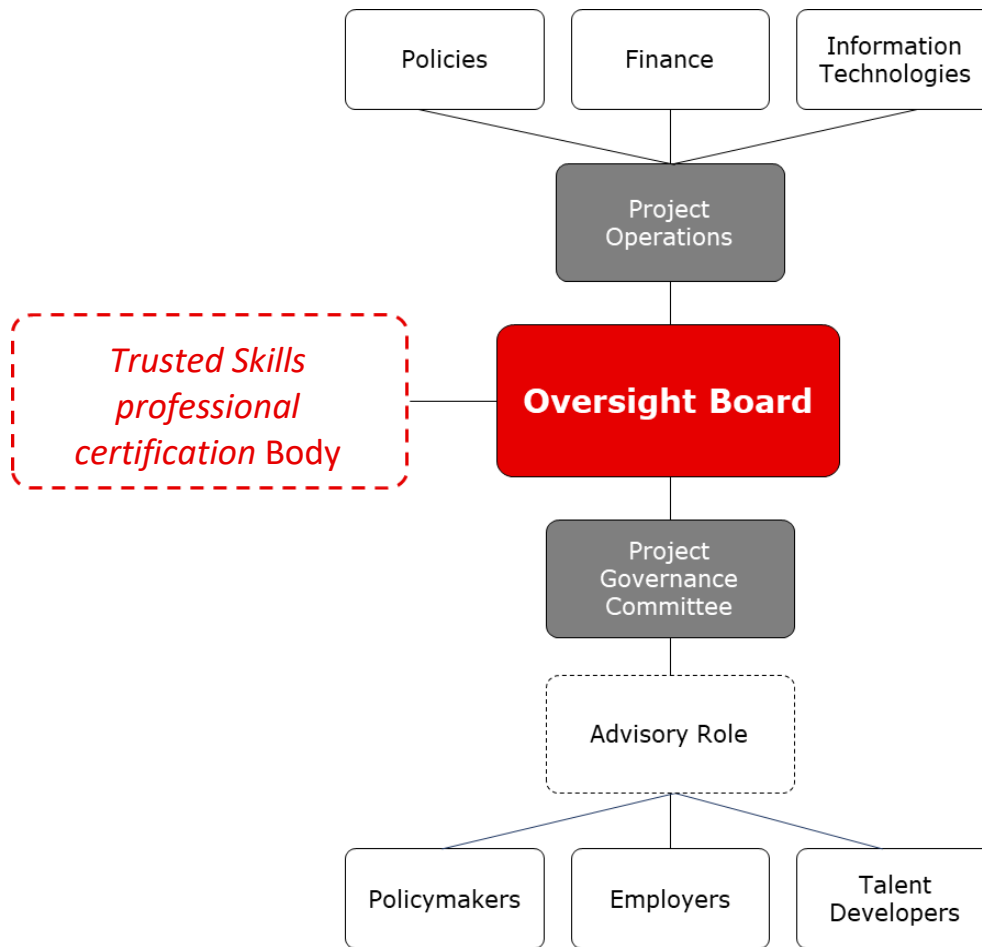

Figure-4: *Trusted Skills* **Governance Model**

Optimizes Efficiency: Establishing a standardized city-level model across professional fields lowers barriers to entry and generates efficiencies and economies of scale.

Operationalizes Rigour: Standardized model, governance, and oversight embeds the rigour essential for trust.

The Prototype

In 2022, Calgary Arts Development Authority, in partnership with Calgary Economic Development, is prototyping *Trusted Skills professional certification*. Three questions define this project:

1. Is there perceived value in *Trusted Skills professional certification* by employers, individuals, and talent developers?

methods?

3. Can *Trusted Skills professional certification* be sustainably scaled?

The project is part of a broader city-level strategic planning program being led by Calgary Arts Development Authority, designed to accelerate the growth of Calgary's creative economy. Given this scope, this project is prototyping four *Trusted Skills professional certification*s in the creative economy field of marketing.

The Certification Process

Certification Governance

After auditing best-of-class systems globally, the *Trusted Skills* project team developed a comprehensive model to operationalize the
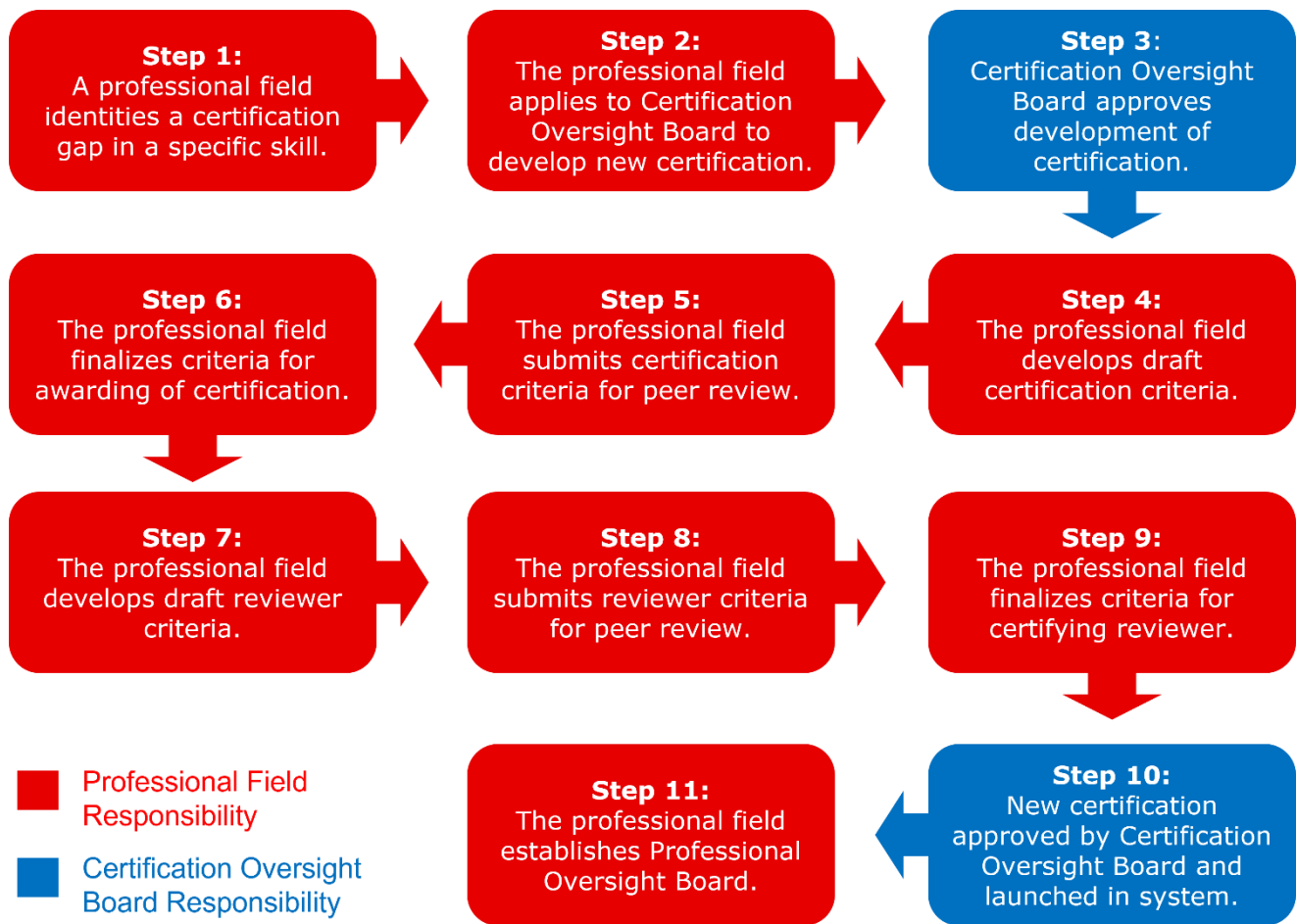
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Figure-5: Establishing a new Designation

prototype. All skill certification initiatives define a series of consistent stakeholders. The *Trusted Skills professional certification* is designed to comply with ISO 17024, which defines standards for the skill certification. Figure-4 provides an overview of the governance and operations structure of the *Trusted Skills professional certification* prototype.

Professional Field

A professional field is a group of people or organizations with a common professional interest, such as an industry (e.g., film) or occupation (e.g., digital marketers). The establishment of a new *Trusted Skills professional certification* can be initiated by any professional field that identifies a trust gap. If approved, a designated professional field is accountable for establishing an oversight committee responsible for developing and managing all aspects of their *Trusted Skills professional certification*. Refer to

Figure-5 for the process of establishing a new *Trusted Skills professional certification*.

Candidate: This is the individual pursuing *Trusted Skills professional certification*.

Trusted Skills **Certifying Body**

During the prototype phase, the *Trusted Skills* certifying body is Calgary Arts Development Authority.[12] The certifying body is operationalized through the Certification Oversight Board (COB), accountable for defining and maintaining oversight of all *Trusted Skills professional certification* designations, including approving criteria, the skill certification processes, and the appointment of certified *Trusted Skills* reviewers. In compliance with ISO 17024 standards, the COB incorporates the following mandatory elements:[13]

- Is responsible for all decisions relating to certification, including the granting, maintaining, expanding, and reducing the scope of the certification.
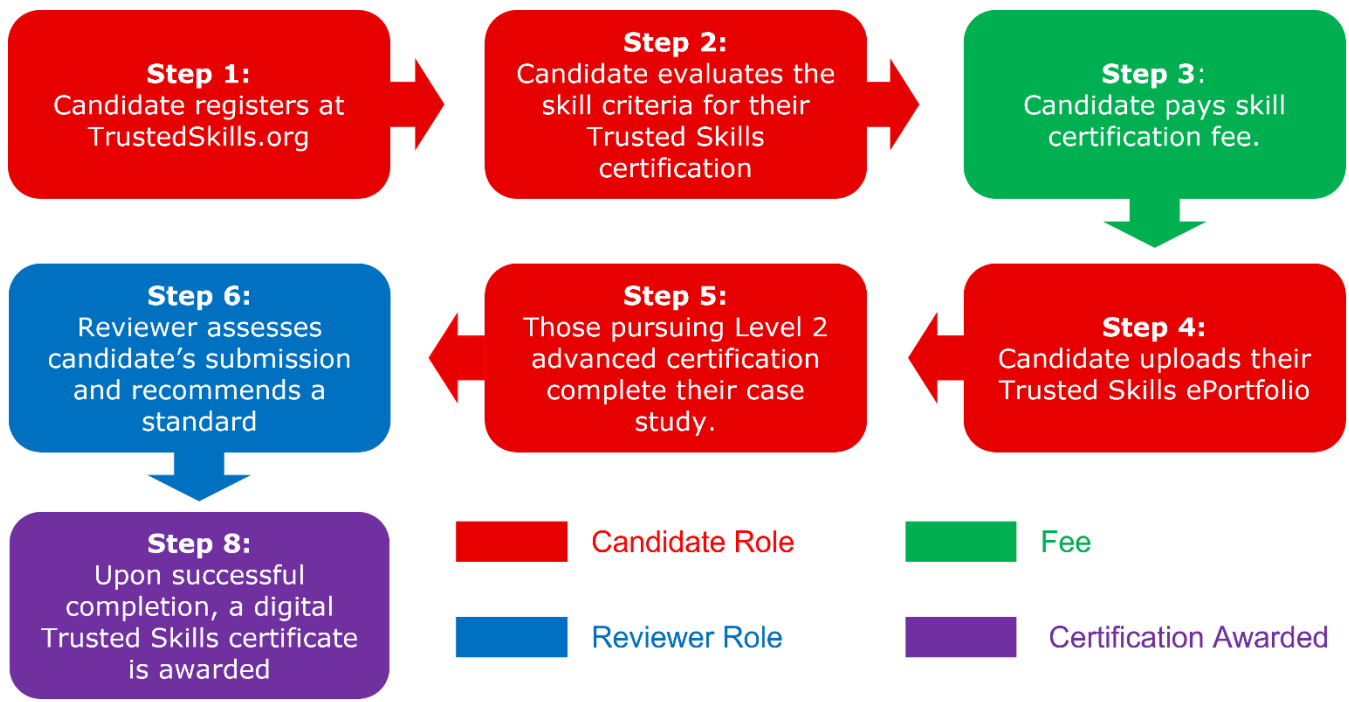
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Figure-6: The *Trusted Skills professional certification* Process

- Will make public the scope of the criteria and a general description of the certification process.

- Will maintain comprehensive certification records. These records will be identified, managed, and disposed of to maintain confidentiality.

- Incorporates policies and procedures necessary to ensure security throughout the entire certification process.

- Will verify and provide information, upon request, on whether an individual holds a current, valid certification and the scope of that certification.

- Incorporates processes and policies to prevent fraudulent examination practices.

- Will monitor the performance of the reviewers and the reliability of the reviewers' judgements.

- If the *Trusted Skills professional certification* is fully deployed, it will ensure that the criteria is assessed and validated on an ongoing, systematic basis.

Professional Field Oversight Board (PFOB)

In a scenario of full deployment, each *Trusted Skills professional certification* will be the responsibility of a designated Professional Field Oversight Board (PFOB). The PFOB is accountable to the COB.

Project Governance Committee

During the prototype phase, the *Trusted Skills* Project Governance Committee is mandated to provide counsel for developing and deploying the *Trusted Skills professional certification* prototype between April and October 2022. The project governance committee comprises representative stakeholders, including employers, talent developers, professionals, and functional experts.

***Trusted Skills* Reviewer**

A certified *Trusted Skills* reviewer is an independent expert assigned to review the evidence submitted to support a candidate's application. To align with ISO 17024 standards, all reviewers must:[14]

- Be certified by the COB as having expertise in the specific skill being assessed.

- Understand and be able to apply the *Trusted Skills professional certification* process.

- Have identified any known conflicts of interest to ensure impartial judgements are made.

- Remain anonymous to a candidate.[15]

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Trusted Skills Components

The guiding principle of *Trusted Skills professional certification* is that it must be labour market driven. For this reason, *Trusted Skills professional certification* complies with ISO 17024 standards enabling the rigorous skill certification criteria and related tools to be adapted based on the unique dynamics of a professional field. The consistent aspects of *Trusted Skills professional certification* include:

Certification Criteria

A certification criterion defines the criteria and evidence by which the Certification Oversight Board (COB) determines that a person fulfils *Trusted Skills professional certification* requirements, including application, assessment, decision on certification, recertification, and use of certificates and logos/marks as applicable. The *Trusted Skills professional certification* criteria comply with ISO 17024 standards by incorporating the following mandatory elements:[16]

- The definition and scope of each certification and recertification.

- The definition of the required skills to be awarded certification.

- The definition of the assessment methods required for the initial certification and recertification.

- The definition of the required evidence of this skill.

- The definition of the criteria for suspending and withdrawing certification.

- The definition of the criteria for changing the scope or level of certification.

- Be managed by appropriate experts.

- Embed appropriate processes and structures.

Trusted Skills ePortfolio

The ePortfolio follows the adage, "Show, don't tell," and includes tangible evidence of a candidate's skill as defined in the certification criteria. The evidence is contextual to each certification; however, they can be clustered in the following areas:

Professional Evidence

This incorporates all evidence developed in a professional capacity. This could be as an employee or in their own business. It is important to remember that much of the work a candidate did professionally may be proprietary and confidential.

Examples of Professional Evidence

- Descriptions about their current and past professional roles explicitly linked to skills.

- Example of a project completed for an employer that demonstrates the skill.

  - Sample of documentation a candidate developed or were part of – reports, presentations, blueprints, websites, schematics, lesson plans, order forms, or management systems

  - Samples of creative outcomes a candidate led or were part of

  - Samples of video or audio content a candidate developed or were part of

  - Sample of marketing programs a candidate led or where part of

  - Sample research a candidate led or were part of

  - Samples of a new product or service a candidate designed

- Customer satisfaction acknowledgement

- Details of the ways their performance has been measured, like sales volumes, client loads, safety records, and overtime a candidate have put in

- Performance evaluations and annual reports

- Military records and awards

- Evidence of training taught

- Examples of work completed if a candidate is self-employed.

  - Business plan

  - Marketing materials

  - Project completed for a client.

Skill Development Evidence

This incorporates all candidate evidence associated with activities that were solely focusing on skill development. This includes formal education and other forms of learning, like workshops or conferences.

Examples of Skill Development Evidence

- Professional designation, certifications and corresponding evidence linked to a skill.

- Educational transcripts explicitly linked to skills
- School project that explicitly demonstrates skill
- Scholarly research project that explicitly demonstrates skill
- Professional development workshops and activities with an outcome that explicitly demonstrates skill (including detailed description).
- Details of any vocational competitions a candidate have participated in.
- Conferences, workshops, committees, and projects that a candidate has been involved with and linked explicitly to a skill.
- Courses or training that a candidate completed and linked explicitly to a skill.

Community Evidence

This incorporates all evidence developed in a voluntary capacity. Many of the same examples from professional evidence may also be relevant for community evidence. Similarly, some of this voluntary work may be proprietary and confidential.

Examples of Community Evidence

- Descriptions about a candidate's current and past voluntary role explicitly linked to skills.
- Example of a project completed in a volunteer capacity that demonstrates the skill.
  - Sample of documentation a candidate developed or were part of – reports, presentations, blueprints, websites, schematics, lesson plans, order forms, or management systems
  - Samples of creative outcomes a candidate led or were part of
  - Samples of video or audio content a candidate developed or were part of
  - Sample of marketing programs a candidate led or where part of
  - Sample research a candidate led or were part of
  - Samples of a new product or service a candidate designed

Personal Evidence

This incorporates all evidence associated with personal interests.

Examples of Personal Evidence

- Example of work completed for personal interest that demonstrates the skill.
  - Photography explicitly linked to skills
  - Writing Samples explicitly linked to skills
  - Published content explicitly linked to skills
  - Blogs/ Vlogs explicitly linked to skills
  - Podcasts explicitly linked to skills
  - Social media posts explicitly linked to skills

Other

- Security clearances explicitly linked to a skill
- An award that demonstrates evidence of the skill
- Past correspondence or assessments that provide evidence of a skill.

Trusted Skills Reflection

The *Trusted Skills* reflection is embedded as a component of the *Trusted Skills* ePortfolio**.** The reflection component is an explicit opportunity for a candidate to provide context and insight to your reviewer into just how they developed their skills and its link to the evidence in your ePortfolio. This is critical as the relevance of the evidence of a candidate's skill development may not be immediately apparent to the reviewer. Reflection may be in a written or video format.

Advanced Skills Case Study

A case study designed to show a candidate's skill associated with a specific certification is required for level 2 advanced certification.

Four-Level Standard

The evidence associated with each certification will be assigned one of four standards:

- Level 0: No evidence of basic skill level
- Level 1: Evidence of basic skill
- Level 2: Evidence of advanced skill
- Level 3: Evidence of expert skill

The management of impartiality during the review process adheres to ISO 17024 standards by incorporating the following mandatory elements:[17]

- The COB shall document its structure, policies, and procedures to manage impartiality and ensure that the *Trusted Skills professional certification* activities are undertaken

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impartially. The COB shall have management commitment to impartiality in *Trusted Skills professional certification* activities. The COB shall have a statement publicly accessible without request that it understands the importance of impartiality in carrying out its certification activities, manages conflict of interest and ensures the objectivity of its *Trusted Skills professional certification* activities.

- The COB shall act impartially concerning its applicants, candidates, and certified persons.

- Certification policies and procedures shall be fair among all applicants, candidates, and certified persons.

- Certification shall not be restricted on the grounds of undue financial or other limiting conditions, such as membership of an association or group. The COB shall not use procedures to unfairly impede or inhibit access by applicants and candidates.

- The COB shall be responsible for remaining impartial in its certification activities and shall not allow commercial, financial, or other pressures to compromise impartiality.

- The COB shall identify threats to its impartiality on an ongoing basis. This shall include those threats that arise from its activities, related bodies, relationships, or the relationships of its personnel. However, such relationships do not necessarily present a body with a threat to impartiality.

- The COB shall analyze, document, and eliminate or minimize the potential conflict of interests arising from its certification activities. The COB shall document and be able to demonstrate how it eliminates, minimizes, or manages such threats. All potential sources of conflict of interest identified, whether they arise from within the certifying body, such as assigning responsibilities to personnel or from the activities of other persons, bodies, or organizations, shall be covered.

Trusted Skills Digital Certificate

Once a candidate has successfully met *Trusted Skills professional certification* criteria, they will be awarded a digital certificate. The digital certificate is compatible with online systems, such as LinkedIn.

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Trusted Skills Marketing Certifications

Prioritizing Trust Gaps

The *Trusted Skills professional certification* prototype focuses on the creative field of marketing. To ensure the prototype aligns with local labour market dynamics, Calgary Arts Development Authority has partnered with the Calgary Marketing Association.

Between January and April 2022, the research team conducted research based on two questions:

1. What did marketing employers define as the highest demand skills?
2. What techniques did marketing employers use to bridge the trust gap?

To answer these questions, we conducted a mixed-methods study.

Labour Market Data Analysis

The first study levered real-time labour market information collected by Burning Glass Inc. Burning Glass collects real-time online employment postings from 40,000 sources globally. This data provides extensive detail on occupations, skills, and qualifications employers seek. National (n=53,549) and Calgary (n=2,638) employment data for marketing positions were analyzed for the 2021 calendar year.

Employer Interviews

Between January and March 2021, 213 interviews were conducted with professionals responsible for hiring marketing staff.[18] A standardized interview protocol was used for all interviews. Interview data was then consolidated and analyzed by the research team.

25% of interviewees were from agencies, and 75% were from the client side. After agencies, the largest sectors in the sample include technology, financial services, packaged goods, and energy. 40% of the sample were small enterprises (1–29 employees); 31% were medium (50–499 employees); 29% were large (500+ employees). 24% of interviewees were founders or presidents, 54% were marketers, and the remaining were from other departments such as human resources. 52% of the company head offices were based in Calgary.

Results

Skills Demand

Consistent with earlier studies, this research identified enabling skills as the highest demand skills from employers, while simultaneously incorporating the largest trust gap. The leading enabling skills, as a proportion of total interviews, include:

1. Creativity 79%
2. Adaptability 75%
3. Verbal communications 74%
4. Time management 74%
5. Analytical thinking 72%

The leading job-specific skills, as a proportion of total interviews, include:

1. Industry knowledge 68%
2. Audience needs 64%
3. Branding 56%
4. Social media 52%
5. Digital media 52%

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Similar to the interview data, enabling skills were the leading skills identified in the labour market data, which include:

1. Communication skills   52%
2. Collaboration   43%
3. Creativity   40%
4. Organizational skills   31%
5. Writing   31%

The leading job-specific skills in the labour market data analysis include:

1. Core marketing knowledge   40%
2. Social media   37%
3. Project management   22%
4. Digital media   21%
5. Budget management   19%

Risk Management Techniques

The interviews explored strategies employers adopt to manage a lack of explicit skill certification. The leading techniques include:

1. References checks   54%
2. Previous work experience   53%
3. Interview tests   45%
4. Academic credentials   38%
5. Employment probation   34%

On average, employers adopted three of the above techniques to mitigate their risk. However, 4% of employers interviewed did not use any specific strategy to verify a candidate's skills during the hiring process.

Prototype Scope

Based on the above analysis, the project team concluded that narrowing the prototype's scope to high-demand marketing skills provides the ability to answer the three questions. As a result, this project will prototype four *Trusted Skills professional certification*s associated with marketing:

1. Marketing Management
2. Digital Marketing
3. Content Creation
4. Creative Thinking

During stakeholder engagement, the project team concluded enabling skills was beyond the prototype scope. This is because certification must incorporate concise certification criteria enabling a *certified Trusted Skills reviewer* to evaluate a candidate's evidence relative to the criteria. Enabling skills present a challenge as they transcend sectors and occupations. For example, defining the certification criteria for problem-solving in a manner that transcends sectors and occupations will require significant stakeholder consultation. Moreover, finding reviewers that can transcend sectors and occupations may also prove challenging. However, given the high-level demand for enabling skills and the potential challenges above, this project will also prototype a certification related to **creative thinking**.

Marketing Management Certification

This *Trusted Skills professional certification* verifies a candidate's skills in the following foundational marketing areas:

Market Insights

1. Evidence of ability to conduct a competitive analysis
2. Evidence of ability to conduct an environmental scan
3. Evidence of ability to conduct secondary market research
4. Evidence of ability to synthesize diverse data to support evidence-based decisions
5. Evidence of currency in marketing analytics tools [19]

Audience Insights

1. Evidence of ability to conduct customer/audience journey mapping
2. Evidence of ability to conduct audience segmentation
3. Evidence of ability to develop customer personas

Marketing Management

1. Evidence of ability to develop product/service roadmap
2. Evidence of ability to manage marketing projects

3. Evidence of ability to develop a pricing strategy

4. Evidence of ability to develop a marketing budget

5. Evidence of ability to develop and manage a distribution strategy

6. Evidence of ability to measure return on marketing investment

7. Evidence of ability to develop and manage marketing metrics and analytics

8. Knowledge and application of marketing ethics

Marketing Communications

1. Evidence of ability to develop brand strategy

2. Evidence of ability to develop positioning strategy

Digital Marketing Certification

The *Trusted Skills professional certification* in Digital Marketing certifies that an individual has digital marketing skills. This includes an ability to use multiple forms of digital media to achieve a marketing goal. A candidate must show skill in the following:

Marketing Insights

1. Evidence of ability to conduct A/B testing

2. Evidence of ability to synthesize diverse data to support evidence-based decisions

3. Evidence of currency in marketing analytics tools [20]

Audience Insights

1. Evidence of ability to conduct customer/audience journey mapping

2. Evidence of ability to develop audience segmentation

3. Evidence of ability to develop customer personas

Marketing Management

1. Evidence of ability to manage marketing projects

2. Evidence of ability to develop and manage a marketing budgeting

3. Evidence of ability to measure return on marketing investment

4. Evidence of ability to use marketing metrics and analytics

Marketing Communications

1. Evidence of ability to develop and execute marketing communication campaigns

2. Evidence of ability to develop and execute a media plan

3. Evidence of ability to develop a campaign brief

4. Evidence of ability to develop and execute a digital advertising campaign, including:

   - Paid search
   - Display advertising
   - Email marketing

5. Evidence of ability to develop and execute a social media marketing campaign, including:

   - Evidence of ability to develop a content calendar

6. Evidence of ability to develop and manage a website including:

   - Evidence of familiarity with HTML/CSS/JavaScript,
   - Evidence of ability to use a content management system.
   - Creating search-optimized content
   - Optimizing website structure for search

Other

1. Evidence of ability to manage e-commerce

Content Creation Certification

The *Trusted Skills professional certification* in Content Creation verifies that an individual has the skill to plan,

create, and curate content, such as text, visual, video, and audio, to support a marketing program. A candidate must prove skill in the following areas:

Marketing Insights

1. Evidence of ability to conduct A/B tests
2. Evidence of ability to synthesize diverse data to support evidence-based decisions
3. Evidence of currency in data visualization tools [21]

Marketing Communications

1. Evidence of ability to develop and execute marketing communication campaigns
2. Evidence of ability to develop and execute a media plan
3. Evidence of ability to develop a campaign brief
4. Evidence of ability to develop and manage traditional media campaign
5. Evidence of ability to develop and manage promotion campaign

Content Creation

1. Evidence of ability to develop original content
2. Evidence of ability to curate text, visual, video, audio content
3. Currency in visual design tools [22]
4. Currency in video editing tools [23]
5. Evidence of ability to curate text, visual, video, audio content
6. Evidence of ability to develop original content in two of the following mediums: copywriting, longform writing, graphic design, photography, videography, audio content
7. Evidence of ability manage to print media process
8. Evidence of ability manage to provide feedback to creative team members
9. Evidence of ability manage to integrate client feedback into content development

Other

1. Evidence of ability to conduct customer personas
2. Evidence of ability to develop and manage marketing metrics and analytics

Creative Thinking Certification

The *Trusted Skills professional certification* in Creative Thinking certification verifies evidence that a candidate possesses skills to understand complex problems, gather inspiration for potential solutions, generate ideas, make those innovative ideas tangible, test those ideas to learn more, and tell the story of an insightful change that they have developed. To be certified, a candidate must demonstrate skill in the following areas:

1. Show curiosity
2. Gather and assess relevant information
3. Manage ambiguity
4. Developing and testing creative ideas
5. Storytelling

Show Curiosity

1. Evidence of ability to demonstrate openness to and interest in change and difference.
2. Evidence of ability to demonstrate a desire to learn more about a problem before seeking a solution
3. Evidence of ability to generate ideas that represent unconventional ways of thinking about a problem
4. Evidence of ability to demonstrate openness to new experiences, approaches and/or relationships

Gather and Assess Relevant Information

1. Evidence of ability to ground creative problem-solving practices in facts and analysis rather than opinions and assertions.
2. Evidence of ability to integrate community members into the solution development process
3. Evidence of ability to use analogous points of inspiration to explore a problem
4. Evidence of ability to integrate a system thinking approach to define a creative problem

5. Evidence of ability to recognize the role of position, privilege and bias when presenting a creative solution to a specific challenge.

6. Evidence of ability to make recommendations that are supported by the analysis of evidence.

Manage Ambiguity

1. Evidence of ability to integrate diverse perspectives when solving a creative problem

2. Evidence of ability to generate multiple alternative solutions and evaluate ideas effectively

3. Evidence of ability to manage ambiguity when presented with challenges.

4. Evidence of ability to assess the first and second order consequences of creative solutions to problems.

Develop and Test Creative Ideas

1. Evidence of ability to consider alternative possibilities as solutions for a creative challenge.

2. Evidence of ability to explore possible solutions using rapid prototyping approaches or tools

3. Evidence of ability to explore possible solutions using experiential or live prototyping approaches and tools.

4. Evidence of ability to test possible solutions with impacted community members to learn more about the solution's viability or useability.

5. Evidence of ability to test possible solutions against established success metrics to learn more about the solution's viability or useability.

Storytelling

1. Evidence of ability to share the story of a creative idea in an insightful manner.

2. Evidence of ability to make the future tangible through storytelling.

3. Evidence of ability to articulate the need for change and aligns the creative solution to the original challenge.

4. Evidence of ability to reflect on feedback and criticism, and to integrate that reflection into the story of the creative idea.

5. Evidence of ability to share creative solutions in an innovative manner with diverse audience groups as needed.

Project Critical Path

The project kicked off in December 2021, focusing on a series of stakeholder engagements, including employers, talent developers and individuals. Concurrent to this, the research team investigated two areas:

1. Global benchmarking study identifying best-of-class decoupled skill models.

2. Mixed-methods marketing skills research

The stakeholder consultation and research guided the development of a preliminary model. Ongoing stakeholder consultation will contribute to refining the preliminary model prior to the prototype launch on June 13, 2022.

Table-2: Project Critical Path

Action	Date
Stakeholder engagement	Dec – April
Global benchmarking	Dec – April
Marketing skills research	Feb – March
Preliminary model design	March – April
Finalize *Trusted Skills professional certification* criteria	May 1
Finalize *Trusted Skills* reviewer certification criteria	May 1
Develop prototype materials • Website • Certification criteria • Candidate handbook • Certified *Trusted Skills* reviewer handbook	April – May
Prototype program live	June 13
Certify reviewers	June
Recruit candidates	May – June
Candidates' complete submission	June – August
Reviewers' complete evaluation of candidate's submission	July – August
Prototype *Trusted Skills professional certification* awarded	August – Sept
Stakeholder feedback	Sept – Oct
Prepare project report and recommendations	Sept – Oct

APPENDIX

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Frequently Asked Questions

Do I need to take a class to be certified?

No. The *Trusted Skills professional certification* considers combined life experiences and recognizes that there are many ways skills develop.

When we think of how we traditionally develop talent, we think of a program or class that we take, and at the end, we are assessed on whether we have the associated knowledge and skills. This is referred to as integrated certification because developing a skill is integrated with the process of verifying the skill.

Trusted Skills professional certification adopts decoupled certification. Decoupled certification recognizes that there are infinite ways to develop a skill, including formal education, work experience, self-directed talent development, and mentoring. The decoupling principle is widely used today in various professional fields, skilled trades, and motor vehicle licensing. Think about a driver's license. People learn how to drive in all different ways. The driver's test is decoupled from a specific class or approach to learning how to drive. Instead, the test focuses only on testing a candidate's ability to drive. For this reason, the *Trusted Skills professional certification* only assesses the skill, not the pathway by which the skill was developed.

What is the value of *Trusted Skills professional certification* to an employer?

Trusted Skills professional certification aims to mitigate risk for employers during the hiring process. Consistent and trusted mechanisms certifying a candidate's skills remove some of this risk. Employers often request specific educational credentials (e.g., degree) or professional certifications (e.g., a Chartered Professional Accountant designation). These certifications confirm in advance that a candidate has certain skills from an objective and trusted third party.

However, few recognized certifications exist for many areas, including non-technical fields. For instance, a university degree in marketing does not necessarily certify that a candidate can plan, launch, and manage a digital media campaign. The real value of *Trusted Skills professional certification* is the potential to recognize the infinite ways high-valued skills can develop, whether through volunteering, attending a workshop, or having a mentor.

What employers will benefit most from *Trusted Skills professional certification*?

Trusted Skills professional certification helps all employers; however, we expect it to have the greatest impact on Calgary-based small-medium enterprises. Since small-medium employers often recruit from the local labour market, they could explicitly seek candidates with a specific certification. In contrast, large national or multinational corporations recruit from a global labour market. Therefore, we expect it will be rare that large-scale employers will specifically embed *Trusted Skills professional certification* into their recruitment process.

What is the value of skill *Trusted Skills professional certification* to a job seeker?

The job market is highly competitive, and most employers receive hundreds or thousands of applications for each job. The job seeker aims to make this decision easier for employers and remove the risk. Having *Trusted Skills professional certification* helps manage this risk by certifying in advance that the job seeker has the skills the employer seeks.

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Why is it only Calgary?

Skill demand is dynamic and ever-changing, making speed and agility essential. By narrowing the scope to metropolitan Calgary, we also narrow the number of stakeholders involved, increasing efficiency while ensuring economies of scale. Keeping the scope at a city-level focuses the program's benefits on Calgary-based small-medium enterprises, which represent 99% of all employers in the city. Research shows that small-medium employers depend heavily on recruiting from their local geographic labour market, primarily because of the high cost of moving a new employee. In contrast, large organizations have the ability and resources to recruit from a larger labour market.

Can someone who has never studied marketing become certified?

Yes. The *Trusted Skills professional certification* program recognizes that developing talent comes in many forms. For example, an early study we conducted found that only 12% percent of marketing professionals in the sample held a degree in marketing.[24] We know that skills no longer develop through a single path but instead develop in the classroom, online, at work, and volunteering, or a combination of these. The *Trusted Skills professional certification* seeks to recognize and reward skills, no matter how they are developed.

What is the process to receive *Trusted Skills professional certification*?

Trusted Skills professional certification follows a consistent simple seven step process.

Step 1

Register at TrustedSkills.org

Step 2

Using the certification criteria, complete *Trusted Skills* self-assessment. This self-assessment will help identify your strengths and areas that require additional development before applying for your *Trusted Skills professional certification*.

If you're not ready to apply for your *Trusted Skills professional certification*, your next step is to develop a plan to meet the required certification criteria. Your plan may incorporate a range of talent development experiences, including certified, non-certified, or informal talent development.

Step 3

Once you're ready to apply for your *Trusted Skills professional certification*, pay your certification fee and begin the process. During the pilot, this fee is being funded by Calgary Arts Development Authority.

Step 4

Complete and upload your *Trusted Skills* ePortfolio. Your ePortfolio is a collection of evidence that demonstrates your skills as required by the certification. This could be videos, documents, project work, or evidence of your own skill development. The portfolio follows the adage, "show, don't tell" and includes tangible evidence of skills as defined in the certification criteria. The evidence is contextual to each certification; however, they can be clustered in the following areas:

Submit your reflection as either a video or written submission. You'll be prompted and asked to reflect on your professional experience and how the evidence you've compiled in your *Trusted Skills* portfolio relates to the certification. The reflection requires you to think about how your evidence, experience, and perspective contribute to your skill. The reflection component of certification allows you to provide context and insight to *Trusted Skills* reviewers into how you've developed your skills.

Step 5

If you are pursuing your advanced certification, you will complete your advanced skills case study. This case study is designed to demonstrate your advanced skill associated with a specific certification.

Step 6

Reviewer assesses your submission relative to your certification criteria and recommends a standard to the certifying oversight board.

Step 7

The oversight board makes the final decision and awards a *Trusted Skills* digital certificate to successful candidates.

Who conducts the *Trusted Skills professional certification*?

We will appoint a *certified Trusted Skills reviewer* to review submissions. The reviewer will have expertise in the specific skill being verified.

To ensure consistency and transparency, all candidates and reviewers have access to a comprehensive skill criterion.

How are *Trusted Skills professional certifications* assessed?

The assigned *certified Trusted Skills reviewer* will use the certification criteria to assign a candidate one of four potential levels:

- Level 0: No evidence of basic skill level
- Level 1: Evidence of basic skill
- Level 2: Evidence of advanced skill
- Level 3: Evidence of expert skill

How much does it cost for *Trusted Skills professional certification*?

The current economic model expects a fee to be paid by the candidate for every certification. This fee is solely for cost recovery.

For the prototype, Calgary Arts Development Authority will fully fund the certification fee. The goal of this model is to balance rigour and accessibility. If the rigour of the *Trusted Skills professional certification* process is compromised, the *Trusted Skills professional certification* will have no value to employers. However, if the process is so costly that Calgarians pursuing *Trusted Skills professional certification* face a financial barrier, it also defeats the goal of greater inclusivity in the labour market.

What is *Trusted Skills* reflection?

Trusted Skills reflection is embedded as a component of your *Trusted Skills* ePortfolio**.** This reflection requires a candidate to reflect on how their evidence, experience, and perspective contribute to their skill. The reflection component is an explicit opportunity for a candidate to provide context and insight to the *Trusted Skills* reviewer into just how they have developed their skills and its link to your ePortfolio. Reflection may be submitted in either written or video format.

What about other *Trusted Skills professional certifications*?

Trusted Skills professional certification aims to be one part of a network of certification opportunities that help Calgarians develop and show the skills they need to succeed in their career pathways. Skill certification, whether through the certification or an existing certification, is essential to all Calgarians' success in their career pathways.

Can a candidate submit work that was completed as part of a team?

When a candidate submits evidence, they will note the team members who contributed to the project. If they did the work solo, they could leave this section blank. But if they worked as a team, they must share the names or handles of co-contributors. Failure to do so results in a disqualification.

How can *Trusted Skills professional certification* facilitate greater inclusivity?

In skill areas where there are no rigorous forms of skill certification, employers de-risk hiring through informal methods (e.g., checking references). These methods are shown to systematically disadvantage candidates in marginalized communities. *Trusted Skills professional certification* is designed to objectively review the level of an individual's skills and reduce the current dependency on informal methods.

What is the process for reviewing the different skills?

Each skill is anchored to a rigorous certification criteria developed by professionals. Your portfolio will be reviewed when applying for certification. For level 2 advance certification you will also complete a case study. For level 3 expert certification your portfolio will be reviewed by an expert panel.

How are *Trusted Skills* reviewers certified?

A core principle is that *Trusted Skills professional certification* is only as legitimate as the process and people who verify them. For this reason, an important goal of this prototype phase is evaluating a variety of mechanisms to ensure rigour. Each *Trusted Skills* reviewer will undergo a rigorous evidence-based review to prove they have the currency and ability to review specific skills.

What organization is awarding *Trusted Skills professional certification*?

The project is a joint initiative of Calgary Arts Development Authority and Calgary Economic Development. During the prototype, we will evaluate the optimal structure and resources needed for a potential scaling of *Trusted Skills professional certification*.

Does decoupling dilute the value of certified talent development?

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Trusted Skills professional certification is designed to complement all forms of talent development, including certified talent development. Decoupling recognizes that there are infinite routes to developing a skill. Most skills involve the intersection of certified, non-certified, and informal talent development experiences. Decoupling unlocks and recognizes the importance of this intersection in modern talent development. An example is how studying liberal arts could help develop high-demand skills, such as problem-solving and communications. Similarly, sports and recreation can play a significant role in developing skills associated with leadership and collaboration. *Trusted Skills professional certification* offers a path for individuals who have these skills to have these rigorously assessed and certified regardless of their background.

How are different skill levels recognized?

Each certification has three defined levels: basic, advanced, and expert. Each level includes detailed certification criteria that define the evidence needed to prove the associated level of skill. To receive a "basic" certification in an area, a candidate must demonstrate a minimum "basic" level in each of the certification criteria.

How can professional or community volunteer work experience be recognized?

The specific evidence will vary by certification. However, all *Trusted Skills professional certification*s require a candidate to supply evidence that they can do what they say they can do. Often this evidence is in the form of earlier work completed. Whether this evidence was the output of a paid employment, or a volunteer experience is irrelevant to the review process, which singularly considers the output.

Why is the prototype linked to marketing?

This project is being funded by Calgary Arts Development Authority (CADA), with the support of Calgary Economic Development and the Calgary Marketing Association. CADA is leading the development of Calgary's creative economy strategy. A pillar of this strategy is the critical need to accelerate the development of Calgary's creative skills. We are evaluating whether decoupling has the potential to unlock and recognize the existing capacity in the system by providing creative talent developers with a certification path.

What happens after the prototype phase?

Following the prototype phase, the project team will review its success compared to the defined questions. Concurrent to the prototype, we will review paths to potential expansion and scaling of *Trusted Skills professional certification* to other professional fields. Based on this, the project team will evaluate the next steps.

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Declaration of Skills
Marketing Management Skills

This declaration of expertise form is to be completed and signed as part of your submission for each certification.

Declaration of Expertise

Frequency: In the past five years, how often have you applied the following skills in your professional or volunteer roles?

Evidence Provided: In the past five years, what evidence have you provided that supports your declaration of expertise?

Skills	Frequency	Evidence Provided
& Insights		
Evidence of ability to conduct competitive analysis		
Evidence of ability to conduct an environmental scan		
Evidence of ability to conduct secondary market research		
Evidence of ability to conduct A/B tests		
Evidence of ability to synthesize diverse data to support evidence-based decisions		
Evidence of currency in marketing analytics tools		
Google		
Google Ads Manager		
Facebook		
Instagram		
Twitter		
YouTube		
LinkedIn		
Snapchat		
TikTok		
Adobe Marketo Engage		
Social listening tools		
Web-based survey tools		
SPSS		

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NVivo		
Evidence of currency in data visualization tools		
Tableau		
Microsoft Power BI		
Sisense		
Domo		
SalesForce Einstein		
Audience Insights		
Evidence of ability to conduct customer/audience journey mapping		
Evidence of ability to conduct audience segmentation		
Evidence of ability to develop customer personas		
Marketing Management		
Evidence of ability to develop a product/service roadmap		
Evidence of ability to manage marketing projects		
Evidence of ability to develop a pricing strategy		
Evidence of ability to develop a marketing budget		
Measure return on marketing investment		
Evidence of ability to develop a and manage marketing metrics and analytics		
Knowledge and application of marketing ethics		
Marketing Communications		
Develop brand strategy		
Develop positioning strategy		
Distribution Management		
Evidence of ability to develop a and manage a distribution strategy		

Declaration

I certify that the information provided is accurate.

Name   **Signature**   **Date**

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Prototype Marketing Skill Certification Matrix

	Marketing Management	Digital Marketing	Content Creation
Analytics & Insights			
Evidence of ability to conduct competitive analysis	🟥		
Evidence of ability to conduct an environmental scan	🟥		
Evidence of ability to conduct secondary market research	🟥		
Evidence of ability to conduct A/B tests		🟥	🟥
Evidence of ability to synthesize diverse data to support evidence-based decisions	🟥	🟥	🟥
Evidence of currency in marketing analytics tools [25]	🟥	🟥	
Evidence of currency in data visualization tools[26]			🟥
Evidence of ability to conduct qualitative market research (e.g., focus groups).			
Evidence of ability to conduct quantitative market research (e.g., survey)			
Audience Insights			
Evidence of ability to conduct customer/audience journey mapping	🟥	🟥	
Evidence of ability to conduct audience segmentation	🟥	🟥	
Evidence of ability to develop customer personas	🟥	🟥	🟥
Marketing Management			
Evidence of ability to develop a product/service roadmap	🟥		
Involved in product/service management			
Evidence of ability to apply user experience (UX) design principles			
Evidence of ability to manage marketing projects	🟥	🟥	
Evidence of ability to develop a pricing strategy	🟥		
Evidence of ability to develop a marketing budget	🟥	🟥	
Measure return on marketing investment	🟥	🟥	
Evidence of ability to develop a and manage marketing metrics and analytics	🟥	🟥	🟥
Knowledge and application of marketing ethics	🟥		
Marketing Communications			
Evidence of ability to develop a brand strategy	🟥		
Evidence of ability to develop a positioning strategy	🟥		
Evidence of ability to develop a and execute marketing communication campaigns		🟥	🟥
Evidence of ability to develop a and execute a media plan			🟥

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Evidence of ability to develop a campaign brief			■
Evidence of ability to develop a and manage traditional media campaigns			■
Evidence of ability to develop a and manage promotion campaigns			■
Evidence of ability to develop a and manage direct mail campaigns			
Evidence of ability to develop a and manage digital advertising campaigns		■	
Paid search		■	
Display advertising		■	
Email marketing		■	
Evidence of ability to develop and manage a social media marketing campaign		■	
Evidence of ability to develop a content calendar		■	
Evidence of ability to develop and manage a website including:		■	
Familiarity with HTML/CSS/JavaScript,		■	
Evidence of ability to use a content management system.		■	
Creating search-optimized content		■	
Optimizing a website structure for search		■	
Evidence of ability to develop a and manage sponsorship and/or community investment			
Evidence of ability to develop a and manage experiential marketing campaigns			
Evidence of ability to develop a and manage events			
Evidence of competency in public relations			
Evidence of competency in media relations			
Evidence of competency in community and stakeholder relations			
Distribution Management			
Evidence of ability to develop a and manage a sales team			
Evidence of ability to develop a and manage a distribution strategy	■		
Currency in customer relationship management (CRM) tools[27]			
Evidence of ability to develop a and manage e-commerce		■	
Evidence of ability to develop a and manage retail merchandising			
Evidence of ability to conduct a sales presentation			
Content Creation			
Currency in visual design tools[28]			■
Currency in video editing tools[29]			■
Evidence of ability to curate text, visual, video, audio content		■	■
Evidence of ability to develop original content in two of the following mediums: copywriting, longform writing, graphic design, photography, videography, audio content			■

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Evidence of ability manage to print media process			
Evidence of ability manage to provide feedback to creative team members			
Evidence of ability manage to integrate client feedback into content development			
Evidence of ability to curate text, visual, video, audio content			
Evidence of ability to develop original content in two of the following mediums: copywriting, longform writing, graphic design, photography, videography, audio content			
Evidence of ability manage to print media process			

Gray = skill not included in any of the prototype certifications.

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Marketing Management Certification Criteria

Skill	Definition	Evidence Example	Level 1 – Basic	Level 2 – Advanced	Level 3 – Expert
Market Insights					
Evidence of ability to conduct a competitive analysis	A competitive analysis should include evidence of… - Ability to analyze opportunities and threats associated with direct and/or indirect competitors. - Ability to synthesize opportunities and threats to guide increasingly complex decisions.	Submit an example of a competitor analysis conducted for an assignment in school.	Demonstrates basic knowledge of how to analyze direct competitors within the same region using primarily secondary research. The evidence provides a base-level analysis contributing to identifying tactical marketing opportunities and threats.	Demonstrates advanced knowledge of how to analyze direct and indirect competitors through synthesizing both primary and secondary research. The analysis contributes to identifying strategic opportunities and threats, as well as providing direct marketing recommendations.	Demonstrates expert knowledge of how to analyze direct and indirect competitors through synthesizing both primary and secondary research. The analysis contributes to identifying strategic opportunities and threats, as well as providing detailed system-level recommendations.
Evidence of ability to conduct an environmental scan	An environmental scan should include evidence of… - Tracking both current and emerging trends - Internal and external environment analysis - Ability to synthesize trends to guide increasingly complex decisions.	Submit an example of an environmental scan conducted for your employer.	Demonstrates basic knowledge in identifying and analyzing trends within their region that could impact their product, or service. The analysis contributes to identifying tactical marketing opportunities and threats.	Demonstrates advanced knowledge in identifying and analyzing trends using both primary and secondary research. Identifies national and local trends that could impact their business, product, or service. Identifies strategic opportunities and threats. Offers direct marketing recommendations.	Demonstrates expert knowledge in identifying and analyzing trends using both primary and secondary research. Identifies global, national, and local trends that could impact their business, product, or service. Analysis identifies strategic opportunities and threats. Offers detailed system-level recommendations.
Evidence of ability to conduct secondary market research	Secondary market research should include evidence of… - Ability to identify credible research, reports, and data collected by a third-party. - Ability to synthesize multiple credible sources to guide increasingly complex decisions.	Submit an example of secondary research completed to support a strategy recommendation.	Demonstrates basic knowledge in the application of secondary research. Evidence includes multiple sources of varying-degrees of credibility.	Demonstrates advanced knowledge in the application of secondary research. All sources are credible, and the candidate synthesizes the research to guide strategic-level marketing decisions.	Demonstrates expert knowledge in the application of secondary research. All sources are credible and include manipulation of secondary qualitative or quantitative data. The candidate synthesizes the research to guide system-level decisions.
Evidence of ability to synthesize diverse	Ability to synthesize diverse evidence, including secondary and/or primary	Submit an example of how using evidence supported a business plan for a client.	Demonstrates basic knowledge and ability to synthesize diverse forms of	Demonstrates advanced knowledge and ability to synthesize diverse forms of	Demonstrates expert knowledge and ability to synthesize diverse forms of

evidence to guide decisions	data, to guide increasingly complex decisions. Synthesizing diverse evidence to guide decisions should include evidence of… ● Ability to identify credible forms or evidence ● Ability to analyze primary and/or secondary data sources. ● Ability to synthesize data to guide increasingly complex decisions.		secondary research to guide tactical marketing decisions.	primary and secondary research to guide strategic-level marketing decisions.	primary and secondary research to guide system-level decisions.
Evidence of currency in a variety of digital marketing analytic tools, such as:	Understanding and using marketing analytic tools should include evidence of… ● Ability to define, measure, manage, and analyze key performance indicators. ● Ability to synthesize KPIs to guide increasingly complex decisions.	Submit an example of using social media analytics to determine which posts were the most successful in a campaign.	Demonstrates basic knowledge and application of four marketing analytic tools. This includes a basic ability to define, measure, manage, and analyze key performance indicators to guide tactical marketing decisions.	Demonstrates advanced knowledge and application of four marketing analytic tools. This includes an advanced ability to define, measure, manage, and analyze key performance indicators to guide strategic-level marketing decisions.	Demonstrates expert knowledge and application of four marketing analytic tools. This includes an expert ability to define, measure, manage, and analyze key performance indicators to guide system-level decisions.
Google	Google Analytics is a freemium web analytics service offered by Google that tracks and reports website traffic.				
Facebook	Facebook Analytics is a built-in tool that tracks and measures all social content performances over time.				
Instagram	Instagram Analytics is a built-in tool that provides information on the performance, engagement, and patterns of posts and accounts as a whole.				
Twitter	Twitter Analytics is a built-in tool that provides information on the performance, engagement,				

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	and patterns of tweets and accounts as a whole.				
YouTube	YouTube Analytics allows users to understand their video and channel performances with key metrics and reports through YouTube Studio.				
LinkedIn	LinkedIn incorporates a selection of metrics that capture the performance of LinkedIn Company pages, including followers, clicks, shares, and comments.				
Snapchat	Snapchat Analytics tracks and optimizes account metrics, including detailed look at story views, frequency of users viewing stories, and how many viewers as a whole.				
TikTok	TikTok Analytics tool is an in-app feature that measures video viewers, followers, and other important data that influence how popular the profile is.				
Audience Insights					
Evidence of ability to conduct customer/ audience journey mapping	Conducting customer/ audience journey mapping should include evidence of… • Ability to analyze all potential journey phases. • Ability to identify touchpoints, highlights, pain points, and opportunities. • Ability to synthesize relevance to marketing campaigns to guide increasingly complex decisions.	Submit an example of a journey map developed for your employer.	Demonstrates basic knowledge and application of the customer journey to guide tactical marketing decisions.	Demonstrates advanced knowledge and application of the customer journey to guide strategic marketing decisions.	Demonstrates expert knowledge and application of the customer journey to guide system-level marketing decisions.
Evidence of ability to conduct audience segmentation	Conducting audience segmentation should include evidence of…	Submit an example of a segmentation model	Demonstrates basic knowledge of audience segmentation. Evidence	Demonstrates advanced knowledge of audience segmentation. Evidence	Demonstrates expert knowledge of audience segmentation. Evidence

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	• Ability to identify demographics, behaviouristics, psychographics, and geographics. • Ability to synthesize relevance to marketing campaigns to guide increasingly complex decisions.	developed for a client in the travel industry.	demonstrates an ability to develop segmentation using observable variables (e.g., geographics, demographics, behaviouristics). The analysis contributes to tactical marketing decisions.	demonstrates an ability to model the interaction of observable variables (e.g., geographics, demographics, behaviouristics). with attitudinal variables, including psychographics. The analysis contributes towards marketing recommendations.	demonstrates an ability to model the complex interaction of observable variables (e.g., geographics, demographics, behaviouristics). with attitudinal variables, including psychographics. This modeling is based on the statistical analysis of audience data. The analysis contributes to system-level recommendations.
Evidence of ability to develop customer personas	Developing customer personas should include evidence of… • Ability to identify demographics, behaviouristics, psychographics, and geographics. • Ability to determine lifestyles and workstyles with personality profiles, including potential goals and pain points. • Ability to synthesize relevance to marketing campaigns to guide increasingly complex decisions.	Submit an example of a customer persona developed for a school assignment.	Demonstrates basic knowledge and the application of customer personas in a marketing context. Creates generic personas that incorporate a combination of demographics, geographics, and behaviouristics. The personas contribute to tactical marketing decisions.	Demonstrates advanced knowledge and the application of customer personas in a marketing context. Creates detailed personas incorporating a combination of demographics, geographics, behaviouristics, and psychographics. Persona includes lifestyle, workstyle, pain points, and goals. The personas guide marketing decisions.	Demonstrates expert knowledge and the application of customer personas in a marketing context. Creates an increasingly detailed persona incorporating a combination of demographics, geographics, behaviouristics, psychographics. Persona includes lifestyle and workstyle, goals, and pain points. The personas guide system-level decisions.
Marketing Management					
Evidence of ability to develop product/ service roadmap	Developing a product/ service roadmap should include evidence of… • Ability to identify the product/ service vision. • Ability to develop a practical marketing strategy that includes relevant tactics, goals, and timeline.	Submit an example of a roadmap developed for a client looking to expand their brand.	Demonstrates basic knowledge and application of a product/ service roadmap. Identifies a tactical marketing strategy to run within a short timeline.	Demonstrates advanced knowledge and application of a product/ service roadmap. Identifies national and local marketing strategies with coinciding tactics that support the product/ service vision. Offers a detailed timeline.	Demonstrates expert knowledge and application of a product/ service roadmap. Identifies global, national, and local marketing strategies with coinciding tactics that support the product/ service vision. Offers a detailed timeline that includes goals and hurdles to guide system-level decisions.

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Evidence of ability to manage marketing projects	Managing marketing projects should include evidence of… • Ability to identify the project plan, goals, and execution. • Performance tracking through analyzing KPIs and metrics. • Creating and following a project budget.	Submit an example of a marketing project run to raise awareness of an upcoming promotion for your employer.	Demonstrates basic knowledge of what is involved in managing a small, local marketing project. This includes identifying goals, a timeline, and potential budget.	Demonstrates advanced knowledge of what is involved in managing a national or local marketing project. This includes a structured timeline with goals and a reasonable budget. Detailed KPIs and metrics analysis.	Demonstrates expert knowledge of what is involved in managing a global, national, or local marketing project. Structured timeline including goals and a specific budget. Detailed KPIs and metrics analysis with key takeaways.
Evidence of ability to develop a pricing strategy	Developing a pricing strategy should include evidence of… • Ability to analyze relevant primary/ secondary research to support strategy • Ability to identify all customer segments, direct and indirect competitors, and an internal and external environmental analysis	Submit an example of a pricing strategy developed for your freelancing business.	Demonstrates basic knowledge of the local market and direct competitors to offer tactical marketing decisions within the strategy.	Demonstrates advanced knowledge of the national and local markets, including direct and indirect competitors. Includes the use of secondary research to support strategic marketing decisions.	Demonstrates expert knowledge of the global, national, and local markets, including direct and indirect competitors. Includes use of primary/ secondary research to support strategy and system-level decisions that include distribution costs.
Evidence of ability to develop a marketing budget	Developing a marketing budget should include evidence of… • Ability to identify costs related to advertising, materials and/ or supplies, marketing staff, software, and content creation.	Submit an example of a marketing budget created to maximize reach on a social media campaign.	Demonstrates basic knowledge of the components of a marketing budget. Budget is simple and reasonable.	Demonstrates advanced knowledge of the components of a marketing budget. Budget is detailed and accurate. Identifies which forms of advertising are needed, the cost, and the best cost option for materials required.	Demonstrates expert knowledge of the components of a marketing budget. Budget is detailed and accurate. Identifies all routes of advertising, the cost, the best cost options for materials required, marketing staff, and software. Includes content creation guidelines.
Evidence of ability to measure return on marketing investment	Measuring a return on marketing investment should include evidence of… • Ability to conduct a financial analysis, including break-even calculations. • Ability to synthesize marketing analytics and campaign cycle time.	Submit an example of an ROI investment analysis done for your employer.	Demonstrates basic knowledge of how to measure the success of a marketing investment. Identifies a break-even point.	Demonstrates advanced knowledge of how to measure the success of a marketing investment. Conducts a full financial analysis to offer strategic marketing recommendations.	Demonstrates an expert knowledge of how to measure the success of a marketing investment. Conducts full financial analysis that is represented through visualization tools. Identifies the cycle time for a marketing investment and offers system-level recommendations.
Evidence of ability to develop and manage	Developing and managing marketing metrics and	Submit an example of how marketing metrics and	Demonstrates basic knowledge of the role	Demonstrates advanced knowledge of the role	Demonstrates expert knowledge of the role

marketing metrics and analytics	analytics should include evidence of… ● Ability to interpret analytic programs that include reach, engagement levels, conversion rate by channel, click-rate, and customer lifetime value (CLV). ● Identifies the ROI and marketing goals.	analytics were used and a description of what they mean to the client.	metrics and analytics play in a successful marketing campaign. Identifies engagement levels within the local area through analytic programs.	metrics and analytics play in a successful marketing campaign. Identifies national and local engagement levels and reach through analytic programs. Identifies which channels are most effective to achieve goals and result in a stronger ROI. Offers direct marketing recommendations.	metrics and analytics play in a successful marketing campaign. Identifies global, national, and local engagement levels and reach through analytic programs. Identifies which channels are most effective to achieve marketing goals, increase click-rates, and result in a stronger ROI. Offers system-level recommendations.
Knowledge and application of marketing ethics	Knowledge and application of marketing ethics should include evidence of… ● Transparency of practices ● Protection of customer data and privacy ● Inclusivity	Submit an example of a social media contest where participants were given all the terms and conditions when they entered.	Demonstrates basic knowledge and application that ethics have in a marketing context.	Demonstrates advanced knowledge and application that ethics have in a marketing context. Identifies how the customer data and privacy are protected. Offers strategic marketing recommendations to increase inclusivity.	Demonstrates an expert knowledge and application that ethics have in a marketing context. Identifies how the customer data and privacy are protected. Offers system-level recommendations to increase inclusivity while retaining a customer focus.
Marketing Communications					
Evidence of ability to develop brand strategy	Developing a brand strategy should include evidence of… ● The ability to formulate a clear and creative strategy to connect a brand with a specific identified community, a structured rollout plan and timeline, and estimated budget. ● Applied use of audience segment research to inform the development of strategic and tactical plans for a brand.	Submit an example of a brand strategy developed for a client as a school assignment.	Demonstrates basic understanding of the brand's specific challenges. Strategy includes some creative solutions supported by secondary research but does not incorporate strategic or tactical initiatives that are grounded in specific audience insights.	Demonstrates advanced knowledge of recognizing the brand challenges. Strategy includes creative and inclusive solutions supported by primary and secondary research to combat national and local brand challenges. Brand story is detailed and supported by a structured rollout plan that aligns with specific audience insights.	Demonstrates an expert knowledge of recognizing the brand challenges. Strategy includes creative and inclusive solutions supported by primary and secondary research to combat global, national, and local brand challenges. Brand story is intuitive and supported by a structured rollout plan and timeline that includes a budget and system-level recommendations to help brand growth and to catalyze connection with key audience groups.
Evidence of ability to develop positioning strategy	Developing a positioning strategy should include evidence of… ● Ability to mobilize findings from a competitor and	Submit an example of your role in assisting your employer change product/ service offerings.	Demonstrates basic knowledge of how the brand should be perceived in the mind of customers. Includes analysis of local	Demonstrates advanced knowledge of how the brand should be perceived in the mind of customers. Includes analysis of national and local direct	Demonstrates an expert knowledge of how the brand should be perceived in the mind of customers. Includes analysis of global, national, and local direct

	audience analysis in order to generate brand positioning insight. • The alignment of brand values and strategy with current market conditions to shift brand position in a competitive field.		direct competitors and trends.	and indirect competitors, trends and occurrences, and customer segments that are supported by secondary research. Offers direct marketing recommendations.	and indirect competitors, trends and occurrences, and customer segments that are supported by primary and secondary research. Offers system-level recommendations.
Other					
Evidence of ability to develop and manage a distribution strategy.	Developing and managing a distribution strategy incorporates the method to deliver products and services to customers. This should include evidence of: • An ability to develop and optimize a distribution strategy to maximize a sustainable competitive advantage. • An ability to identify, develop and manage a direct and/or indirect distribution channel strategy. An ability to develop a distribution channel compensation model to maximize a sustainable competitive advantage.	Submit an example of a distribution strategy developed and supported by evidence for your employer.	Demonstrates basic knowledge of developing and managing a distribution strategy. Includes an analysis of local markets and customer needs that is supported by secondary research.	Demonstrates advanced knowledge of developing and managing a distribution strategy. Includes an analysis of national and local markets and customer needs that is supported by primary and secondary research. Offers direct marketing decisions for the best distribution method.	Demonstrates an expert knowledge of developing and managing a distribution strategy. Includes an analysis of global, national, and local markets and customer needs that is supported by primary and secondary research. Offers system-level recommendations that includes a budget and timelines.

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Digital Marketing Criteria

Skill	Definition	Evidence Example	Level 1 – Basic	Level 2 – Advanced	Level 3 – Expert
Marketing Insights					
Evidence of ability in A/B testing	Conducting A/B tests should include evidence of… - Ability to conduct a controlled experiment with two variables and explicit hypothesis testing - Ability to use test results to guide increasingly complex decisions.	Submit an example of an A/B test conducted for an assignment in school.	Demonstrates basic knowledge and the application of A/B testing within the marketing context. Application of the test is simple and applied to a small sample group to guide tactical marketing decisions.	Demonstrates advanced knowledge and the application of A/B testing within the marketing context. Application of the test is increasingly complex and applied to a larger sample group to guide strategic-level marketing decisions.	Demonstrates expert knowledge and the application of A/B testing within the marketing context. Application includes the synthesis of multiple tests to guide system-level decisions.
Evidence of ability to synthesize diverse evidence to guide decisions	Ability to synthesize diverse evidence, including secondary and/or primary data, to guide increasingly complex decisions. Synthesizing diverse evidence to guide decisions should include evidence of… - Ability to identify credible forms or evidence - Ability to analyze primary and/or secondary data sources. - Ability to synthesize data to guide increasingly complex decisions.	Submit an example of how using evidence supported a business plan for a client.	Demonstrates basic knowledge and ability to synthesize diverse forms of secondary research to guide tactical marketing decisions.	Demonstrates advanced knowledge and ability to synthesize diverse forms of primary and secondary research to guide strategic-level marketing decisions.	Demonstrates expert knowledge and ability to synthesize diverse forms of primary and secondary research to guide system-level decisions.
Evidence of currency in a variety of digital marketing analytic tools, such as:	Understanding and using marketing analytic tools should include evidence of… - Ability to define, measure, manage, and analyze key performance indicators. - Ability to synthesize KPIs to guide	Submit an example of using social media analytics to determine which posts were the most successful in a campaign.	Demonstrates basic knowledge and application of four marketing analytic tools. This includes a basic ability to define, measure, manage, and analyze key performance indicators to guide tactical marketing decisions.	Demonstrates advanced knowledge and application of four marketing analytic tools. This includes an advanced ability to define, measure, manage, and analyze key performance indicators to guide strategic-level marketing decisions.	Demonstrates expert knowledge and application of four marketing analytic tools. This includes an expert ability to define, measure, manage, and analyze key performance indicators to guide system-level decisions.

	increasingly complex decisions.				
Google	Google Analytics is a freemium web analytics service offered by Google that tracks and reports website traffic.				
Facebook	Facebook Analytics is a built-in tool that tracks and measures all social content performances over time.				
Instagram	Instagram Analytics is a built-in tool that provides information on the performance, engagement, and patterns of posts and accounts as a whole.				
Twitter	Twitter Analytics is a built-in tool that provides information on the performance, engagement, and patterns of tweets and accounts as a whole.				
YouTube	YouTube Analytics allows users to understand their video and channel performances with key metrics and reports through YouTube Studio.				
LinkedIn	LinkedIn incorporates a selection of metrics that capture the performance of LinkedIn Company pages, including followers, clicks, shares, and comments.				
Snapchat	Snapchat Analytics tracks and optimizes account metrics, including detailed look at story views, frequency of users viewing stories, and how many viewers as a whole.				
TikTok	TikTok Analytics tool is an in-app feature that measures video viewers, followers, and other important data that				

	influence how popular the profile is.				
Audience Insights					
Evidence of ability to conduct customer/ audience journey mapping	Conducting customer/ audience journey mapping should include evidence of… • Ability to analyze all potential journey phases. • Ability to identify touchpoints, highlights, pain points, and opportunities. • Ability to synthesize relevance to marketing campaigns to guide increasingly complex decisions.	Submit an example of a journey map developed for your employer.	Demonstrates basic knowledge and application of the customer journey to guide tactical marketing decisions.	Demonstrates advanced knowledge and application of the customer journey to guide strategic marketing decisions.	Demonstrates expert knowledge and application of the customer journey to guide system-level marketing decisions.
Evidence of ability to develop audience segmentation	Conducting audience segmentation should include evidence of… • Ability to identify demographics, behaviouristics, psychographics, and geographics. • Ability to synthesize relevance to marketing campaigns to guide increasingly complex decisions.	Submit an example of a segmentation model developed for a client in the travel industry.	Demonstrates basic knowledge of audience segmentation. Evidence demonstrates an ability to develop segmentation using observable variables (e.g., geographics, demographics, behaviouristics). The analysis contributes to tactical marketing decisions.	Demonstrates advanced knowledge of audience segmentation. Evidence demonstrates an ability to model the interaction of observable variables (e.g., geographics, demographics, behaviouristics). with attitudinal variables, including psychographics. The analysis contributes towards marketing recommendations.	Demonstrates expert knowledge of audience segmentation. Evidence demonstrates an ability to model the complex interaction of observable variables (e.g., geographics, demographics, behaviouristics). with attitudinal variables, including psychographics. This modeling is based on the statistical analysis of audience data. The analysis contributes to system-level recommendations.
Evidence of ability to develop customer personas	Developing customer personas should include evidence of… • Ability to identify demographics, behaviouristics, psychographics, and geographics. • Ability to determine lifestyles and workstyles with personality profiles,	Submit an example of a customer persona developed for a school assignment.	Demonstrates basic knowledge and the application of customer personas in a marketing context. Creates generic personas that incorporate a combination of demographics, geographics, and behaviouristics. The personas contribute to tactical marketing decisions.	Demonstrates advanced knowledge and the application of customer personas in a marketing context. Creates detailed personas incorporating a combination of demographics, geographics, behaviouristics, and psychographics. Persona includes lifestyle, workstyle, pain points, and	Demonstrates expert knowledge and the application of customer personas in a marketing context. Creates an increasingly detailed persona incorporating a combination of demographics, geographics, behaviouristics, psychographics. Persona includes lifestyle and

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	including potential goals and pain points. • Ability to synthesize relevance to marketing campaigns to guide increasingly complex decisions.			goals. The personas guide marketing decisions.	workstyle, goals, and pain points. The personas guide system-level decisions.
Marketing Management					
Evidence of ability to manage marketing projects	Managing marketing projects should include evidence of… • Ability to identify the project plan, goals, and execution. • Performance tracking through analyzing KPIs and metrics. • Creating and following a project budget.	Submit an example of a marketing project run to raise awareness of an upcoming promotion for your employer.	Demonstrates basic knowledge of what is involved in managing a small, local marketing project. This includes identifying goals, a timeline, and potential budget.	Demonstrates advanced knowledge of what is involved in managing a national or local marketing project. This includes a structured timeline with goals and a reasonable budget. Detailed KPIs and metrics analysis.	Demonstrates expert knowledge of what is involved in managing a global, national, or local marketing project. Structured timeline including goals and a specific budget. Detailed KPIs and metrics analysis with key takeaways.
Evidence of ability to develop and manage a marketing budgeting	Developing a marketing budget should include evidence of… • Ability to identify costs related to advertising, materials and/ or supplies, marketing staff, software, and content creation.	Submit an example of a marketing budget created to maximize reach on a social media campaign.	Demonstrates basic knowledge of the components of a marketing budget. Budget is simple and reasonable.	Demonstrates advanced knowledge of the components of a marketing budget. Budget is detailed and accurate. Identifies which forms of advertising are needed, the cost, and the best cost option for materials required.	Demonstrates expert knowledge of the components of a marketing budget. Budget is detailed and accurate. Identifies all routes of advertising, the cost, the best cost options for materials required, marketing staff, and software. Includes content creation guidelines.
Evidence of ability to measure return on marketing investment	Measuring a return on marketing investment should include evidence of… • Ability to conduct a financial analysis, including break-even calculations. • Ability to synthesize marketing analytics and campaign cycle time.	Submit an example of an ROI investment analysis done for your employer.	Demonstrates basic knowledge of how to measure the success of a marketing investment. Identifies a break-even point.	Demonstrates advanced knowledge of how to measure the success of a marketing investment. Conducts a full financial analysis to offer strategic marketing recommendations.	Demonstrates an expert knowledge of how to measure the success of a marketing investment. Conducts full financial analysis that is represented through visualization tools. Identifies the cycle time for a marketing investment and offers system-level recommendations.
Evidence of ability to leverage marketing metrics and analytics	Developing and managing marketing metrics and analytics should include evidence of…	Submit an example of how marketing metrics and analytics were used and a description of what they mean to the client.	Demonstrates basic knowledge of the role metrics and analytics play in a successful marketing campaign. Identifies	Demonstrates advanced knowledge of the role metrics and analytics play in a successful marketing campaign. Identifies	Demonstrates expert knowledge of the role metrics and analytics play in a successful marketing campaign. Identifies global,

	• Ability to interpret analytic programs that include reach, engagement levels, conversion rate by channel, click-rate, and customer lifetime value (CLV). • Identifies the ROI and marketing goals.		engagement levels within the local area through analytic programs.	national and local engagement levels and reach through analytic programs. Identifies which channels are most effective to achieve goals and result in a stronger ROI. Offers direct marketing recommendations.	national, and local engagement levels and reach through analytic programs. Identifies which channels are most effective to achieve marketing goals, increase click-rates, and result in a stronger ROI. Offers system-level recommendations.
Marketing Communications					
Evidence of ability to develop and execute marketing communication campaigns	Developing and executing marketing communication campaigns should include evidence of… • Ability to identify which channels of advertising to utilize based on environmental and audience analysis. • Execution of campaign and performance tracking analysis.	Submit an example of a marketing campaign run through your school club to promote an upcoming event.	Demonstrates basic knowledge and application of a marketing communications campaign. Appropriate promotion channel use supports recommended tactical marketing decisions.	Demonstrates advanced knowledge and application of a marketing communications campaign. Appropriate promotion channel use supports recommended strategic marketing decisions.	Demonstrates expert knowledge and application of a marketing communications campaign. Appropriate promotion channel use supports recommended system-level marketing decisions.
Evidence of ability to develop and execute a media plan	Developing and executing a media plan should include evidence of… • Ability to conduct an environmental analysis relevant to identifying media strategy and objectives. • Measurable goals for analysis and evaluation of media plan success.	Submit an example of a media plan developed and recommended for a client project.	Demonstrates basic knowledge and application of a media plan. Analysis contributes to tactical marketing decisions.	Demonstrates advanced knowledge and application of a media plan. Analysis contributes to strategic marketing decisions.	Demonstrates expert knowledge and application of a media plan. Analysis contributes to system-level marketing decisions.
Evidence of ability to develop a campaign brief	Developing a campaign brief should include evidence of… • Ability to write coherently and creatively. • Recognition of the client/ brand needs, campaign objectives, environmental analysis, and budget.	Submit an example of a campaign brief you created for a school assignment.	Demonstrates basic knowledge and application of a campaign brief to guide tactical marketing decisions.	Demonstrates advanced knowledge and application of a campaign brief to guide strategic marketing decisions.	Demonstrates expert knowledge and application of a campaign brief to guide system-level marketing decisions.

Evidence of ability to develop and execute a digital advertising campaign, including:	Developing and executing a digital advertising campaign should include evidence of… • Ability to identify marketing objectives through environmental and audience analysis. • Recognition of both mobile and web platform use, search routes, social media and content marketing, and lead nurturing. • Identifies ROI and marketing goals.	Submit an online course certification you took through Hootsuite.	Demonstrates basic knowledge and application of a successful digital marketing campaign. Analysis contributes to tactical marketing decisions.	Demonstrates advanced knowledge and application of a successful digital marketing campaign. Analysis contributes to strategic marketing decisions.	Demonstrates expert knowledge and application of a successful digital marketing campaign. Analysis contributes to system-level marketing decisions.
Paid search	Any search process where results are dictated by payment from advertisers.	Submit an example of a paid search you set up for your employer.			
Display advertising	Graphic advertising on Internet websites, apps, or social media through banners or other formats made of text, images, video, and audio.	Submit an example of a brand banner you created for the Facebook page.			
Email marketing	Using email to send advertisements, request business, or solicit sales or donations to potential or current customers.	Submit an example of an email campaign asking for donations for the non-profit organization you volunteer for.			
Evidence of ability to develop and execute a social media marketing campaign, including:	Developing and executing a social media marketing campaign should include evidence of… • Ability to identify brand goals, marketing strategy, and campaign goals. • Identifies target market and appropriate social media channels through supported research. • Identifies ROI and uses analytics to provide recommendations.	Submit an example of a social media campaign run for a client project.	Demonstrates basic knowledge and application of a social media marketing campaign. Use of secondary research supports strategy and tactical marketing decisions.	Demonstrates advanced knowledge and application of a social media marketing campaign. Use of primary/ secondary research supports strategic marketing decisions.	Demonstrates expert knowledge and application of a social media marketing campaign. Use of primary/ secondary research supports system-level marketing decisions.

Develop a content calendar	A living document that maps out all the marketing activities, including details, content, and timing, across an organization.	Submit an example of a content calendar developed as part of a school assignment.			
Evidence of ability to develop and manage a website including:	Developing a website should include evidence of… • Consideration of website navigation, mobile use, visual design, and information accessibility. • Utilization of keyword search and/ or search engine optimization (SEO). • Ability to define, measure, manage, and analyze key performance indicators to guide increasingly complex decisions.	Submit an example of a website you developed for your freelance company.	Demonstrates basic knowledge and application of developing a website to support tactical marketing decisions.	Demonstrates advanced knowledge and application of developing a website to support strategic marketing decisions. Use of analytics and performance indicators.	Demonstrates expert knowledge and application of developing a website to support system-level marketing decisions. Use of analytics, performance indicators, and SEO.
Evidence of familiarity with HTML/CSS/JavaScript,					
Evidence of ability to use a content management system.					
Optimizing website structure for search	The process of finding and analyzing search terms that people enter into search engines with the goal of using that data for a specific marketing purpose.	Submit an example of a certification course you took to learn about the keyword search process.			
Creating search-optimized content	The process of improving the quality and quantity of website traffic to a website or web page from search engines.	Submit an example of how SEO was used to increase website traffic for your employer.			
Other					
Evidence of ability to manage ecommerce	Managing ecommerce should show evidence of… • Use of social media and digital advertising to attract visitors and	Submit an example of all aspects of a marketing campaign you connected to support ecommerce for your employer.	Demonstrates basic knowledge and application of managing tactical marketing ecommerce decisions.	Demonstrates advanced knowledge and application of managing strategic marketing ecommerce	Demonstrates expert knowledge and application of managing system-level marketing ecommerce decisions. Use of keyword

				decisions. Use of analytics to further audience reach.	search, SEO, and analytics to further audience reach.
	facilitate purchases online. • Optimization of product pages through keywords and search engine optimization methods. • Ability to define, measure, manage, and analyze key performance indicators to guide increasingly complex decisions.				

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Content Creation Criteria

Skill	Definition	Evidence Example	Level 1 – Basic	Level 2 – Advanced	Level 3 – Expert
Marketing Insights					
Evidence of ability to conduct A/B Tests	Conducting A/B tests should include evidence of… • Ability to conduct a controlled experiment with two variables and explicit hypothesis testing • Ability to use test results to guide increasingly complex decisions.	Submit an example of an A/B test conducted for an assignment in school.	Demonstrates basic knowledge and the application of A/B testing within the marketing context. Application of the test is simple and applied to a small sample group to guide tactical marketing decisions.	Demonstrates advanced knowledge and the application of A/B testing within the marketing context. Application of the test is increasingly complex and applied to a larger sample group to guide strategic-level marketing decisions.	Demonstrates expert knowledge and the application of A/B testing within the marketing context. Application includes the synthesis of multiple tests to guide system-level decisions.
Evidence of ability to synthesize diverse evidence to guide decisions	Ability to synthesize diverse evidence, including secondary and/or primary data, to guide increasingly complex decisions. Synthesizing diverse evidence to guide decisions should include evidence of… • Ability to identify credible forms or evidence • Ability to analyze primary and/or secondary data sources. • Ability to synthesize data to guide increasingly complex decisions.	Submit an example of how using evidence supported a business plan for a client.	Demonstrates basic knowledge and ability to synthesize diverse forms of secondary research to guide tactical marketing decisions.	Demonstrates advanced knowledge and ability to synthesize diverse forms of primary and secondary research to guide strategic-level marketing decisions.	Demonstrates expert knowledge and ability to synthesize diverse forms of primary and secondary research to guide system-level decisions.
Evidence of currency in a variety of data visualization tools, such as: • Tableau • Microsoft Power BI • Sisense • Domo	Expertise and skill in using tool and should include evidence of… • Comprehension of analytics and metrics. • Insightful use of specific	Submit an example of a campaign's analytics converted into easy-to-read graphs for the client.	Demonstrates basic knowledge and application of the program. Offers tactical marketing recommendations.	Demonstrates advanced knowledge and application of the program. Offers strategic marketing recommendations.	Demonstrates expert knowledge and application of the program. Offers system-level recommendations.

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• SalesForce Einstein	software/program capacities.				
Marketing Management					
Evidence of ability to manage marketing projects	Managing marketing projects should include evidence of… • Ability to identify the project plan, goals, and execution. • Performance tracking through analyzing KPIs and metrics. • Creating and following a project budget	Submit an example of a marketing project run to raise awareness of an upcoming promotion for your employer.	Demonstrates basic knowledge of what is involved in managing a small, local marketing project. This includes identifying goals, a timeline, and potential budget.	Demonstrates advanced knowledge of what is involved in managing a national or local marketing project. This includes a structured timeline with goals and a reasonable budget. Detailed KPIs and metrics analysis.	Demonstrates expert knowledge of what is involved in managing a global, national, or local marketing project. Structured timeline including goals and a specific budget. Detailed KPIs and metrics analysis with key takeaways.
Evidence of ability to develop a marketing budget	Developing a marketing budget should include evidence of… • Ability to identify costs related to advertising, materials and/ or supplies, marketing staff, software, and content creation.	Submit an example of a marketing budget created to maximize reach on a social media campaign.	Demonstrates basic knowledge of the components of a marketing budget. Budget is simple and reasonable.	Demonstrates advanced knowledge of the components of a marketing budget. Budget is detailed and accurate. Identifies which forms of advertising are needed, the cost, and the best cost option for materials required.	Demonstrates expert knowledge of the components of a marketing budget. Budget is detailed and accurate. Identifies all routes of advertising, the cost, the best cost options for materials required, marketing staff, and software. Includes content creation guidelines.
Evidence of ability to measure return on marketing investment	Measuring a return on marketing investment should include evidence of… • Ability to conduct a financial analysis, including break-even calculations. • Ability to synthesize marketing analytics and campaign cycle time.	Submit an example of an ROI investment analysis done for your employer.	Demonstrates basic knowledge of how to measure the success of a marketing investment. Identifies a break-even point.	Demonstrates advanced knowledge of how to measure the success of a marketing investment. Conducts a full financial analysis to offer strategic marketing recommendations.	Demonstrates an expert knowledge of how to measure the success of a marketing investment. Conducts full financial analysis that is represented through visualization tools. Identifies the cycle time for a marketing investment and offers system-level recommendations.
Evidence of ability to develop and manage marketing metrics and analytics	Developing and managing marketing metrics and analytics should include evidence of… • Ability to interpret analytic programs that include reach, engagement levels, conversion rate by channel, click-rate,	Submit an example of how marketing metrics and analytics were used and a description of what they mean to the client.	Demonstrates basic knowledge of the role metrics and analytics play in a successful marketing campaign. Identifies engagement levels within the local area through analytic programs.	Demonstrates advanced knowledge of the role metrics and analytics play in a successful marketing campaign. Identifies national and local engagement levels and reach through analytic programs. Identifies which channels are most effective	Demonstrates expert knowledge of the role metrics and analytics play in a successful marketing campaign. Identifies global, national, and local engagement levels and reach through analytic programs. Identifies which channels are most effective

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| | | | | and customer lifetime value (CLV).
• Identifies the ROI and marketing goals. | | to achieve goals and result in a stronger ROI. Offers direct marketing recommendations. | to achieve marketing goals, increase click-rates, and result in a stronger ROI. Offers system-level recommendations. |

Marketing Communications					
Evidence of ability to develop and execute marketing communication campaigns	Developing and executing marketing communication campaigns should include evidence of… • Ability to identify which channels of advertising to utilize based on environmental and audience analysis. • Execution of campaign and performance tracking analysis.	Submit an example of a marketing campaign run through your school club to promote an upcoming event.	Demonstrates basic knowledge and application of a marketing communications campaign. Appropriate promotion channel use supports recommended tactical marketing decisions.	Demonstrates advanced knowledge and application of a marketing communications campaign. Appropriate promotion channel use supports recommended strategic marketing decisions.	Demonstrates expert knowledge and application of a marketing communications campaign. Appropriate promotion channel use supports recommended system-level marketing decisions.
Evidence of ability to develop and execute a media plan	Developing and executing a media plan should include evidence of… • Ability to conduct an environmental analysis relevant to identifying media strategy and objectives. • Measurable goals for analysis and evaluation of media plan success.	Submit an example of a media plan developed and recommended for a client project.	Demonstrates basic knowledge and application of a media plan. Analysis contributes to tactical marketing decisions.	Demonstrates advanced knowledge and application of a media plan. Analysis contributes to strategic marketing decisions.	Demonstrates expert knowledge and application of a media plan. Analysis contributes to system-level marketing decisions.
Evidence of ability to develop a campaign brief	Developing a campaign brief should include evidence of… • Ability to write coherently and creatively. • Recognition and communication of the client/ brand needs, campaign objectives, environmental analysis, and budget, and KPIs.	Submit an example of a campaign brief you created for a school assignment.	Demonstrates basic knowledge and application of a campaign brief to guide tactical marketing decisions.	Demonstrates advanced knowledge and application of a campaign brief to guide strategic marketing decisions.	Demonstrates expert knowledge and application of a campaign brief to guide system-level marketing decisions.
Evidence of ability to develop and manage a	Developing and managing traditional media	Submit an example of a local newspaper campaign	Demonstrates basic knowledge and application of traditional media being	Demonstrates advanced knowledge and application of traditional media being	Demonstrates expert knowledge and application of traditional media being

traditional media campaign	campaigns should include evidence of… • Environmental and audience analysis • Appropriate form of media selected based on research. • Identifies KPIs, ROI, and budget.	you helped develop for your employer.	used to support marketing campaign goals. Use of secondary research supports tactical marketing decisions.	used to support marketing campaign goals. Use of primary/ secondary research supports strategic marketing decisions.	used to support marketing campaign goals. Use of primary/ secondary research supports system-level marketing decisions.
Evidence of ability to develop and manage promotion campaign	Developing and managing a promotion campaign should include evidence of… • Environmental and audience analysis. • Appropriate form of media selected based on campaign goals and needs. • Identifies KPIs, ROI, and budget.	Submit an example of a campaign run to promote a fundraiser for the non-profit organization you volunteer for.	Demonstrates basic knowledge and application of a promotion campaign. Use of secondary research supports tactical marketing decisions.	Demonstrates advanced knowledge and application of a promotion campaign. Use of primary/ secondary research supports strategic marketing decisions.	Demonstrates expert knowledge and application of a promotion campaign. Use of primary/ secondary research supports system-level decisions.
Content Creation					
Evidence of ability to develop original content.	Developing original content should show evidence of… • Environmental and audience analysis. • Identifies goals and strategy. • Creative and unique designs.	Submit an example of a set of content you created specifically for a client project.	Demonstrates basic knowledge and application of content development to support tactical marketing decisions. Includes designs that are adequately creative and technically proficient.	Demonstrates advanced knowledge and application of content development to support strategic marketing decisions. Includes designs that are high quality and include a moderate degree of technicality.	Demonstrates expert knowledge and application of content development to support system-level decisions. Includes designs that are high quality and include a high degree of technicality.
Evidence of ability to curate text, visual, video, audio content	Curating text, visual, video, and audio content should include evidence of… • Imaginative creative content. • Attention to detail Understanding of the product/ service offer and audience being targeted.	Submit an example of a podcast series developed and recorded as part of a client project.	Demonstrates basic knowledge of the role curating text, visual, video, and audio content to support tactical marketing decisions.	Demonstrates advanced knowledge of the role curating text, visual, video, and audio content to support strategic marketing decisions.	Demonstrates expert knowledge of the role curating text, visual, video, and audio content to support system-level decisions.
Evidence of currency in a variety of visual design tools, such as:					
Adobe Photoshop	Expertise and skill in using Adobe Photoshop should include evidence of…	Submit an example of an image you manipulated with various tools on the program.	Demonstrates basic knowledge and application of the program. Includes designs that are adequately	Demonstrates advanced knowledge and application of the program. Includes designs that are creative and unique to support	Demonstrates an expert knowledge and application of the program. Includes designs that are creative, insightful, and innovative

	• Imaginative content creation • Insightful use of specific software/program capacities. • Attention to detail related to the technical parameters of file generation and use parameters determined by the method of dissemination.		creative and technically proficient.	marketing purposes and engage audiences. Designs are high quality and include a moderate degree of technicality. Alignment with the method of dissemination is clearly considered.	to support marketing purposes and influence higher engagement with audiences. Designs are high quality that include a high degree of technicality and understanding of the functional affordances of the program. Alignment with the method of dissemination is evident and expertly implemented.
Adobe InDesign	Expertise and skill in using Adobe InDesign should include evidence of… • Imaginative content creation • Insightful use of specific software/program capacities • Attention to detail related to the technical parameters of file generation and use parameters determined by the method of dissemination.	Submit evidence of a pamphlet created for an upcoming fundraiser for a non-profit organization you volunteer at.	Demonstrates basic knowledge and application of the program. Includes designs that are adequately creative and technically proficient.	Demonstrates advanced knowledge and application of the program. Includes designs that are creative and unique to support marketing purposes and engage audiences. Designs are high quality and include a moderate degree of technicality. Alignment with the method of dissemination is clearly considered.	Demonstrates an expert knowledge and application of the program. Includes designs that are creative, insightful, and innovative to support marketing purposes and influence higher engagement with audiences. Designs are high quality that include a high degree of technicality and understanding of the functional affordances of the program. Alignment with the method of dissemination is evident and expertly implemented.
Adobe Illustrator	Expertise and skill in using Adobe Illustrator should include evidence of… • Imaginative content creation • Insightful use of specific software/program capacities • Attention to detail related to the technical parameters of file generation and use parameters determined by the method of dissemination.	Submit an example of a logo and/ or icon you created through the program.	Demonstrates basic knowledge and application of the program. Includes designs that are adequately creative and technically proficient.	Demonstrates advanced knowledge and application of the program. Includes designs that are creative and unique to support marketing purposes and engage audiences. Designs are high quality and include a moderate degree of technicality. Alignment with the method of dissemination is clearly considered.	Demonstrates an expert knowledge and application of the program. Includes designs that are creative, insightful, and innovative to support marketing purposes and influence higher engagement with audiences. Designs are high quality that include a high degree of technicality and understanding of the functional affordances of the program. Alignment with the method of dissemination is evident and expertly implemented.

Adobe XD	Expertise and skill in using Adobe XD should include evidence of… • Imaginative content creation • Insightful use of specific software/program capacities • Attention to detail related to the technical parameters of file generation and use parameters determined by the method of dissemination.	Submit an example of an online class taken to learn and practice the program.	Demonstrates basic knowledge and application of the program. Includes designs that are adequately creative and technically proficient.	Demonstrates advanced knowledge and application of the program. Includes designs that are creative and unique to support marketing purposes and engage audiences. Designs are high quality and include a moderate degree of technicality. Alignment with the method of dissemination is clearly considered.	Demonstrates an expert knowledge and application of the program. Includes designs that are creative, insightful, and innovative to support marketing purposes and influence higher engagement with audiences. Designs are high quality that include a high degree of technicality and understanding of the functional affordances of the program. Alignment with the method of dissemination is evident and expertly implemented.
Canva	Expertise and skill in using Canva should include evidence of… • Imaginative content creation • Insightful use of specific software/program capacities • Attention to detail related to the technical parameters of file generation and use parameters determined by the method of dissemination.	Submit an example of a project report template you developed for a school assignment.	Demonstrates basic knowledge and application of the program. Includes designs that are adequately creative and technically proficient.	Demonstrates advanced knowledge and application of the program. Includes designs that are creative and unique to support marketing purposes and engage audiences. Designs are high quality and include a moderate degree of technicality. Alignment with the method of dissemination is clearly considered.	Demonstrates an expert knowledge and application of the program. Includes designs that are creative, insightful, and innovative to support marketing purposes and influence higher engagement with audiences. Designs are high quality that include a high degree of technicality and understanding of the functional affordances of the program. Alignment with the method of dissemination is evident and expertly implemented.
Affinity Designer	Expertise and skill in using Affinity Designer should include evidence of… • Imaginative content creation • Insightful use of specific software/program capacities • Attention to detail related to the technical parameters of file generation and use parameters determined by the	Submit an example of a social media post you created using the program tools and functions.	Demonstrates basic knowledge and application of the program. Includes designs that are adequately creative and technically proficient.	Demonstrates advanced knowledge and application of the program. Includes designs that are creative and unique to support marketing purposes and engage audiences. Designs are high quality and include a moderate degree of technicality. Alignment with the method of dissemination is clearly considered.	Demonstrates an expert knowledge and application of the program. Includes designs that are creative, insightful, and innovative to support marketing purposes and influence higher engagement with audiences. Designs are high quality that include a high degree of technicality and understanding of the functional affordances of the program. Alignment with the method of

			Demonstrates basic	Demonstrates advanced	Demonstrates expert
	method of dissemination.				dissemination is evident and expertly implemented.
Inkscape	Expertise and skill in using Inkscape should include evidence of… • Imaginative content creation • Insightful use of specific software/program capacities • Attention to detail related to the technical parameters of file generation and use parameters determined by the method of dissemination.	Submit an example of marketing materials made for your employer.	Demonstrates basic knowledge and application of the program. Includes designs that are adequately creative and technically proficient.	Demonstrates advanced knowledge and application of the program. Includes designs that are creative and unique to support marketing purposes and engage audiences. Designs are high quality and include a moderate degree of technicality. Alignment with the method of dissemination is clearly considered.	Demonstrates an expert knowledge and application of the program. Includes designs that are creative, insightful, and innovative to support marketing purposes and influence higher engagement with audiences. Designs are high quality that include a high degree of technicality and understanding of the functional affordances of the program. Alignment with the method of dissemination is evident and expertly implemented.
Evidence of currency in a variety of video editing tools, such as: • PowerDirector 365 • Adobe Premiere Pro • DaVinci Resolve • Corel VideoStudio Ultimate • Pinnacle Studio • Hitfilm Express • Adobe Premiere Elements	Expertise and skill in using PowerDirector 365 should include evidence of… • Imaginative creative content. • Insightful use of specific software/program capacities. • Attention to detail related to the technical parameters of file generation and use parameters determined by the method of dissemination.	Submit an example of a video created to use on social media to increase engagement for your employer.	Demonstrates basic knowledge and application of the program with content that supports tactical marketing decisions. Includes videos that are adequately creative and technically proficient.	Demonstrates advanced knowledge and application of the program. Includes videos that are creative and unique to support strategic marketing purposes and engage audiences. Videos are high quality and include a moderate degree of technicality.	Demonstrates an expert knowledge and application of the program. Includes videos that are creative, insightful, and innovative to support system-level purposes and influence higher engagement with audiences. Videos are high quality that include a high degree of technicality and understanding of the functional affordances of the program.
Evidence of ability to curate text, visual, video, audio content	Curating text, visual, video, and audio content should include evidence of… • Imaginative creative content. • Attention to detail • Understanding of the product/ service offer	Submit an example of a podcast series developed and recorded as part of a client project.	Demonstrates basic knowledge of the role curating text, visual, video, and audio content to support tactical marketing decisions.	Demonstrates advanced knowledge of the role curating text, visual, video, and audio content to support strategic marketing decisions.	Demonstrates expert knowledge of the role curating text, visual, video, and audio content to support system-level decisions.

	and audience being targeted.				
Evidence of ability to develop original content in two of the following mediums:					
Copywriting	Expertise in copywriting should include evidence of… • Understanding of the product/ service offer and audience being targeted. • Proficiency in grammar, spelling, and reading comprehension.	Submit an example of a project summary you proofread and aligned the language on for a client.	Demonstrates basic knowledge and application of the role copywriting has in tactical marketing decisions.	Demonstrates advanced knowledge and application of the role copywriting has in strategic marketing decisions.	Demonstrates expert knowledge and application of the role copywriting has in system-level decisions.
Longform writing	Expertise and skill in longform writing should include evidence of… • Understanding of product/ service offer and audience being targeted. • Proficiency in grammar, spelling, and reading comprehension.	Submit an example of a research paper you wrote as a school assignment.	Demonstrates basic knowledge and application of the role longform writing has in tactical marketing decisions.	Demonstrates advanced knowledge and application of the role longform writing has in strategic marketing decisions.	Demonstrates expert knowledge and application of the role longform writing has in system-level decisions.
Copy editing	Expertise and skill in copy editing should include evidence of… • Understanding of product/ service offer and audience being targeted. • Proficiency in grammar, spelling, and reading comprehension.	Submit an example of a web copy you proofread and simplified for your employer.	Demonstrates basic knowledge and application of the role copy editing has in tactical marketing decisions.	Demonstrates advanced knowledge and application of the role copy editing has in strategic marketing decisions.	Demonstrates expert knowledge and application of the role copy editing has in system-level decisions.
Graphic design	Expertise and skill in graphic design should include evidence of… • Imaginative, creative content and attention to detail. • Content supports marketing goals and messaging.	Submit an example of a design you created and exported for a client project.	Demonstrates basic knowledge and application of graphic design in a marketing context. Includes designs that are adequately creative and technically proficient to support tactical marketing purposes.	Demonstrates advanced knowledge and application of graphic design in a marketing context. Includes designs that are creative and unique to support strategic marketing purposes and engage audiences. Designs are	Demonstrates expert knowledge and application of graphic design in a marketing context. Includes designs that are creative, insightful, and innovative to support system-level purposes and influence higher

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				high quality and include a moderate degree of technicality.	engagement with audiences. Designs are high quality that include a high degree of technicality and understanding of the functional affordances of the program.
Photography	Expertise and skill in photography should include evidence of… • Imaginative and creative content. • Storytelling through imagery that aligns with client/ brand needs.	Submit an example of an event photography portfolio you took for clients.	Demonstrates basic knowledge and application of photography in a marketing context. Includes imagery that is adequately creative and technically proficient to support tactical marketing purposes.	Demonstrates advanced knowledge and application of photography in a marketing context. Includes imagery that is creative and unique to support strategic marketing purposes and engage audiences. Photographs are high quality and include a moderate degree of technicality.	Demonstrates expert knowledge and application of photography in a marketing context. Includes imagery that is creative, insightful, and innovative to support system-level purposes and influence higher engagement with audiences. Photographs are high quality that include a high degree of technicality.
Videography	Expertise and skill in videography should include evidence of… • Imaginative and creative content. • Storytelling through videos that aligns with client/ brand needs.	Submit an example of a video presentation recorded and edited for a school assignment.	Demonstrates basic knowledge and application of videography in a marketing context. Includes videos that are adequately creative and technically proficient to support tactical marketing purposes.	Demonstrates advanced knowledge and application of videography in a marketing context. Includes videos that are creative and unique to support strategic marketing purposes and engage audiences. Videos are high quality and include a moderate degree of technicality.	Demonstrates expert knowledge and application of videography in a marketing context. Includes videos that are creative, insightful, and innovative to support system-level purposes and influence higher engagement with audiences. Videos are high quality that include a high degree of technicality.
Audio content (e.g., podcast, audio advertisements)	Expertise and skill in audio content should include evidence of… • Identifies a marketing strategy that seamlessly weaves audio content into brand needs • Identifies hosting and distribution methods (e.g., radio, Spotify)	Submit an example of a sponsorship advertisement you wrote and had recorded for your employer.	Demonstrates basic knowledge and application of using audio content to support tactical marketing purposes.	Demonstrates advanced knowledge and application of using audio content to support strategic marketing purposes.	Demonstrates expert knowledge and application of using audio content to support system-level purposes.
Evidence of ability to manage print media process	Managing the print media process should include evidence of…	Submit an example of a brochure you helped develop for a non-profit organization you volunteer for.	Demonstrates basic knowledge and application of the print media process to support tactical marketing purposes.	Demonstrates advanced knowledge and application of the print media process to support strategic marketing purposes.	Demonstrates expert knowledge and application of the print media process to support system-level purposes.

			Demonstrates basic	Demonstrates advanced	Demonstrates expert
	• Identifies and communicates the product/ service offer. • Identifies distribution channels, timeline, and budget.				
Evidence of ability to provide feedback to creative team members	Providing feedback to creative team members should include evidence of… • Thoughtful and constructive recommendations that contribute to marketing goals and objectives. • Reflection on content, attention to detail, colours, design, etc.	Submit an example of a feedback loop you participated in with a school assignment.	Demonstrates basic knowledge of the type of feedback a creative team requires in order to support tactical marketing purposes.	Demonstrates advanced knowledge of the type of feedback a creative team requires in order to support strategic marketing purposes.	Demonstrates expert knowledge of the type of feedback a creative team requires in order to support system-level purposes.
Evidence of ability to integrate client feedback into content development	Integrating client feedback into content development should include evidence of… • Clear changes that show more alignment with the client's brand, product, or service.	Submit an example of client feedback that shows their satisfaction in delivering the content they asked for.	Demonstrates basic knowledge and application of integrating client feedback into content development.	Demonstrates advanced knowledge and application of integrating client feedback into content development. Changes align with strategic marketing purposes.	Demonstrates expert knowledge and application of integrating client feedback into content development. Changes align with system-level purposes.
Other					
Evidence of ability to conduct customer personas	Developing customer personas should include evidence of… • Ability to identify demographics, behaviouristics, psychographics, and geographics. • Ability to determine lifestyles and workstyles with personality profiles, including potential goals and pain points. • Ability to synthesize relevance to marketing campaigns to guide increasingly complex decisions.	Submit an example of a customer persona developed for a school assignment.	Demonstrates basic knowledge and the application of customer personas in a marketing context. Creates generic personas that incorporate a combination of demographics, geographics, and behaviouristics. The personas contribute to tactical marketing decisions.	Demonstrates advanced knowledge and the application of customer personas in a marketing context. Creates detailed personas incorporating a combination of demographics, geographics, behaviouristics, and psychographics. Persona includes lifestyle, workstyle, pain points, and goals. The personas guide marketing decisions.	Demonstrates expert knowledge and the application of customer personas in a marketing context. Creates an increasingly detailed persona incorporating a combination of demographics, geographics, behaviouristics, psychographics. Persona includes lifestyle and workstyle, goals, and pain points. The personas guide system-level decisions.

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Evidence of ability to develop and manage marketing metrics and analytics	Developing and managing marketing metrics and analytics should include evidence of… • Ability to interpret analytic programs that include reach, engagement levels, conversion rate by channel, click-rate, and customer lifetime value (CLV). • Identifies the ROI and marketing goals.	Submit an example of how marketing metrics and analytics were used and a description of what they mean to the client.	Demonstrates basic knowledge of the role metrics and analytics play in a successful marketing campaign. Identifies engagement levels within the local area through analytic programs.	Demonstrates advanced knowledge of the role metrics and analytics play in a successful marketing campaign. Identifies national and local engagement levels and reach through analytic programs. Identifies which channels are most effective to achieve goals and result in a stronger ROI. Offers direct marketing recommendations.	Demonstrates expert knowledge of the role metrics and analytics play in a successful marketing campaign. Identifies global, national, and local engagement levels and reach through analytic programs. Identifies which channels are most effective to achieve marketing goals, increase click-rates, and result in a stronger ROI. Offers system-level recommendations.

Project Glossary

Certification Application Process

The *Trusted Skills professional certification* application process complies with ISO 17024 standards by incorporating the following mandatory elements:[30]

- Information required to identify the applicant.

- The scope of the desired certification.

- A statement that the applicant agrees to comply with the certification requirements and supply any information needed for the assessment.

- Opportunity for the candidate to declare, within reason, a request for accommodation of special needs.

Certification Assessment Process

- The assessment is planned and structured to ensure the defined requirements are objectively and systematically verified with evidence to confirm the candidate's skill.

- The certification criteria for assessment of evidence shall be established, documented, and monitored.

- The definition of evidence must ensure the comparability of each candidate's results, both in content and difficulty, including the validity of a *Trusted Skills professional certification* decision. This will ensure that each assessment is fair and valid.

- The assessment process will verify and accommodate special needs within reason and where the integrity of the assessment is not violated.

- Procedures must ensure a consistent administration.

Certifying Body

During the prototype phase, the certifying body is Calgary Arts Development Authority.[31] The certifying body is operationalized through the Certification Oversight Board (COB), accountable for defining and maintaining oversight of all *Trusted Skills professional certification*s, including approving certification criteria, the skill certification processes, and the appointment of *certified Trusted Skills reviewer*s. In compliance with ISO 17024 standards, the COB incorporates the following mandatory elements: [32]

- Is responsible for all decisions relating to certification, including the granting, maintaining, expanding, and reducing the scope of the certification.

- Will make public the scope of the certification criteria and a general description of the certification process.

- Will maintain comprehensive certification records. These records will be identified, managed, and disposed of to maintain confidentiality.

- Incorporates policies and procedures necessary to ensure security throughout the entire certification process.

- Will verify and provide information, upon request, on whether an individual holds a current, valid certification and the scope of that certification.

- Incorporates processes and policies to prevent fraudulent examination practices.

- Will monitor the performance of the reviewers and the reliability of the reviewers' judgements.

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- If certification is fully deployed, it will ensure that the certification criteria is assessed and validated on an ongoing, systematic basis.

Certification Candidate

- The applicant pursuing *Trusted Skills professional certification*.

Certification Criteria

Certification criteria defines the certification criteria and evidence by which the Oversight Board (COB) determines that a person fulfils certification requirements (also referred to as "standards"), including application, assessment, decision on certification, recertification and use of certificates and logos/marks as applicable. Certification criteria complies with ISO 17024 standards by incorporating the following mandatory elements: [33]

- A definition and scope of each certification and recertification.

- A definition of the required skills to be awarded certification.

- A definition of the assessment methods required for the initial certification and recertification

- A definition of the required evidence of this skill.

- A definition of the certification criteria for suspending and withdrawing certification.

- A definition of the certification criteria for changing the scope or level of certification.

- Be managed by appropriate experts.

- Embed appropriate processes and structures.

Certification Decision

The information used to award a *Trusted Skills professional certification* complies with ISO 17024 standards by incorporating the following mandatory elements:[34]

- Certification decisions are the sole discretion of the COB.

- All information used is traceable.

- The COB will award certification based on only the certification criteria.

- Those on the COB are not in conflict of interest with the candidate.

- Those appointed to the COB possess the expertise to decide on awarding certification.

- Certification will not be granted until all certification requirements are fulfilled.

- If certification is fully deployed, the COB must provide a documented process to receive, evaluate and make decisions on appeals, including the following:

  - A public process for appealing, including providing timely updates on the status of an appeal.

  - A process for tracking and recording an appeal.

  - A process to ensure corrective action will be taken if applicable.

  - Policies to ensure appeals are timely and impartial.

  - Process to guarantee that the submission, investigation, and decision on appeals shall not result in discriminatory actions against the appellant.

Certification Fee

The certification fee is the cost associated with reviewing each. This fee is a direct cost recovery to compensate the *certified Trusted Skills reviewer*s. The certification fee for the prototype is sponsored by CADA.

Certification Oversight Board (COB)

Trusted Skills professional certification is operationalized through the Certification Oversight Board (COB), accountable for defining and maintaining oversight of all *Trusted Skills professional certification*s, including approving certification criteria, the skill certification processes, and the appointment of *certified Trusted Skills reviewer*s.

Certification Reviewer

Certified expert assigned to review the evidence submitted by a candidate. The selection and approval processes shall ensure that reviewers:

- Are certified by the COB as having expertise in the specific skill being assessed.

- Understand and can apply the certification process.

- Have identified any known conflicts of interest to ensure impartial judgements are made.

- Will remain anonymous to a candidate.[35]

Digital Certificate

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The COB will provide a certificate to all persons who have been awarded *Trusted Skills professional certification*. The COB maintains the sole ownership of the certificates. The format of the certificate during the prototype will be defined by the COB and be authorized by a responsible member of the COB, and contain the following:

- Certified person's name.
- Certifying body's name.
- Refer to the certification criteria where relevant.
- The scope of the certification.
- Awarding date of the certification.
- Elements to minimize the risk of counterfeiting.

Decoupling

In a talent development context, decoupling involves disconnecting the process of developing a skill and certifying a skill. Higher education often integrates these paths. For example, an individual takes a class and is assessed upon completion as meeting a defined learning outcome. Decoupling puts the primacy of skill certification by recognizing that infinite ways to develop a skill exist. The decoupling principle is widely used today in various professional fields, including skilled trades and motor vehicle licensing.

Educational Certification[36]

This category includes persons who have obtained a secondary or high school diploma or high school equivalency certificate. The section also includes university certificates or diplomas below the bachelor's level. University certificates or diplomas commonly link with professional associations in accounting, banking, insurance, or public administration. The certificates and diplomas in this category do not require a bachelor's degree as a prerequisite.

Enabling Skills

Enabling skills (also called transferable, human, or soft skills) incorporate aptitude, ability, knowledge, and skills associated with problem-solving, self-reliance, collaboration, communications, core literacies, and core workplace skills.

The hours put into a specific talent development experience. To be recognized in most certification programs, such as co-operative education or the Red Seal, hours need to be tracked and documented.

Evidence

Tangible evidence of a defined skill.

Fairness

Equal opportunity for success provided to each candidate in the *Trusted Skills professional certification* process.[37]

Four-Level Standard

The evidence associated with each certification will be assigned one of four standards:

- Level 0: No evidence of basic skill level
- Level 1: Evidence of basic skill
- Level 2: Evidence of advanced skill
- Level 3: Evidence of expert skill

Functional Skills

Functional skills are linked to skills needed to complete a specific role, such as an accountant, a project manager, a chef, a nurse, or a software developer. Functional skills embed the ability to adapt and apply this skill across different sectors. Functional skills can develop through a variety of certified, non-certified, and informal talent development. However, the foundation for many functional skills is developed through forms of certified talent development. For example, university and college programming often center around a functional skill (e.g., Bachelor of Nursing; Culinary Arts Diploma).

Impartiality

Presence of objectivity. Objectivity means that conflicts of interest do not exist or are resolved to not adversely influence subsequent activities of the certifying body.[38]

Job-Specific Skills

Job-specific skills incorporate aptitude, ability, knowledge, and skills needed to complete a functional task (e.g., accounting, welding) or apply a skill to a unique sectoral context (e.g., oil and gas, logistics).

License [39]

A license is a permit from a recognized authority to perform a defined task (e.g., medical).

Management of Impartiality

The management of impartiality complies with ISO 17024 standards by incorporating the following mandatory elements:[40]

- The COB shall document its structure, policies, and procedures to manage impartiality and ensure that the certification activities are undertaken impartially. The COB shall have management commitment to impartiality in *Trusted Skills professional certification* activities. The COB shall have a statement publicly accessible without request that it understands the importance of impartiality in carrying out its certification activities, manages conflict of interest and ensures the objectivity of its certification activities.

- The COB shall act impartially concerning its applicants, candidates, and certified persons.

- Certification policies and procedures shall be fair among all applicants, candidates, and certified persons.

- Certification shall not be restricted on the grounds of undue financial or other limiting conditions, such as membership in an association or group. The COB shall not use procedures to unfairly impede or inhibit access by applicants and candidates.

- The COB shall be responsible for the impartiality of its certification activities and shall not allow commercial, financial, or other pressures to compromise impartiality.

- The COB shall identify threats to its impartiality on an ongoing basis. This shall include threats that arise from its activities, its related bodies, its relationships, or the relationships of its personnel. However, such relationships do not necessarily present a body with a threat to impartiality.

- The COB shall analyze, document, and eliminate or minimize the potential conflict of interests arising from its certification activities. The COB shall document and be able to demonstrate how it eliminates, minimizes, or manages such threats. All potential sources of conflict of interest identified, whether they arise from within the certifying body, such as assigning responsibilities to personnel or from the activities of other persons, bodies, or organizations, shall be covered.

Professional Field

A professional field is a group of people or organizations with a common professional interest, such as an industry (e.g., film) or occupation (e.g., digital marketers). The establishment of a new certification can be initiated by any professional field that identifies demand for skill certification. If approved, a designated professional field is accountable for establishing an oversight committee responsible for developing and managing all aspects associated with their certification. The professional field for the prototype is marketing.

Professional Field Oversight Board (PFOB)

In a scenario of full deployment, each certification will be the responsibility of a designated Professional Field Oversight Board (PFOB). The PFOB will be accountable to the Certification Oversight Board.

Project Governance Committee

The *Trusted Skills* Project Governance Committee is mandated to provide counsel for developing and deploying the *Trusted Skills professional certification* prototype between April and October 2022. The project governance committee comprises representative stakeholders, including employers, talent developers, professionals, and functional experts.

Reliability

The indicator of the extent to which examination scores are consistent across different examination times and locations, different examination forms and different reviewers.[41]

Review Process

A process led by a *certified Trusted Skills reviewer* that evaluates a person's fulfilment of the requirements of the certification criteria.[42]

Sectoral Expertise

Sectoral expertise is the unique contextual knowledge or skills needed to complete a specific role within a defined sector. For example, a sector may have unique regulatory, legal, or historical contexts that influence a functional role. For example, an accountant in oil and gas may require specialized knowledge compared to an accountant in the financial services sector. The challenge with sector expertise is the highly contextual nature of sub-sectors within a sector. For example, the oil and gas sector comprise dozens of specialized sub-sectors, including upstream, midstream, and downstream. Within each of these sub-sectors, an additional

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specialization is tied to exploration, drilling, transportation, refining, and distribution.

Unlike functional skills, sector expertise is primarily developed and refined through direct experience in a sector. The immersion in a sector contextualizes functional skills to this sector. For instance, an individual with strong functional marketing skills must adapt these skills to shift from consumer-packaged goods to tourism.

Self-Assessment

This is the process of a candidate assessing their skills compared to the certification criteria. Based on the self-assessment, a candidate can establish a skill development plan to meet the criteria for *Trusted Skills professional certification*. This plan may incorporate various talent development experiences, including certified, non-certified, or informal talent development. The *Trusted Skills professional certification* website supplies guidance on development pathways and resources available by the diverse talent ecosystem.

Skills

The combination of aptitude, ability, and knowledge to complete a task. In this project, we cluster skills into two categories: enabling skills and job-specific skills.

Skill Evidence

This is the evidence a candidate is asked to submit to prove their skill. The evidence is contextual to each certification.

Skill Certification

Skill certification is the practice applied to decide if a candidate has evidence of the aptitude, ability, knowledge, and skills needed to complete a defined task.

Trusted Skills professional certification

Trusted Skills professional certification aligns with the economic development priorities Calgary. This model is intentionally decoupled from a specific talent development process and is granted by an independent community body. The legitimacy is rooted in the rigour of the *Trusted Skills professional certification* and the potential for ubiquity across a community's talent ecosystem.[43]

Trusted Skills Reflection

The *Trusted Skills* reflection is embedded as a component of your *Trusted Skills* ePortfolio. This reflection requires a candidate to reflect on how their evidence, experience, and perspective contribute to their skill. The reflection component is an explicit opportunity for a candidate to provide context and insight to the *Trusted Skills* reviewer into just how they have developed their skills and its link to your ePortfolio. Reflection may be submitted in either written or video format.

Validity

Evidence that the assessment measures what it is intended to measure, as defined by the certification criteria.

References

[1] Glaeser, E. L., & Saiz, A. (2003). The rise of the skilled city (No. w10191). *National Bureau of Economic Research*.

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[16] Refer to ISO/ IEC Standard 17024 available from: https://www.iso.org/standard/52993.html

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[18] We would like to recognize and thank the support of Mount Royal University marketing students who conducted and synthesized the employer interview data.

[19] Including: Google, Facebook, Instagram, Twitter, YouTube, LinkedIn, Snapchat, TikTok, Adobe Marketo Engage, Social listening tools, Web-based survey tools, SPSS, NVivo

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[21] Including Tableau, Microsoft Power BI, Sisense, Domo, SalesForce Einstein

[22] Including Adobe Photoshop, Adobe InDesign, Adobe Creative Suite, Adobe Illustrator, Adobe XD, Canva, Affinity Designer, Inkscape, Figma, Sketch

[23] PowerDirector 365, Adobe Premiere Pro, DaVinci Resolve, Corel VideoStudio Ultimate, Pinnacle Studio, Hitfilm Express, Adobe Premiere Elements

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[28] Including Adobe Photoshop, Adobe InDesign, Adobe Creative Suite, Adobe Illustrator, Adobe XD, Canva, Affinity Designer, Inkscape, Figma, Sketch

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[31] Refer to ISO/ IEC Standard 17024 available from: https://www.iso.org/standard/52993.html

[32] Refer to ISO/ IEC Standard 17024 available from: https://www.iso.org/standard/52993.html

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[41] Refer to ISO/ IEC Standard 17024 available from: https://www.iso.org/standard/52993.html

[42] Refer to ISO/ IEC Standard 17024 available from: https://www.iso.org/standard/52993.html

[43] Refer to eCampus Ontario experiments as an example.