



2012 Certification Program Guide

Callidus Education Services

About Callidus Education Services

Callidus Software offers a comprehensive set of performance-oriented, role-based certified training courses and Certification Programs for SPM professionals. These hands-on courses enable our customers and partners to become proficient implementers, administrators and users of Callidus Software products.

Comprehensive information about Callidus Software Professional Development is available at www.callidussoftware.com, including:

Course & Schedules

Course listings, descriptions, and schedules

Policies

Attendance, registration, payment, confirmation and cancellation policies

About Callidus Software

Founded in 1996, Callidus Software (www.CallidusSoftware.com) is the industry's leading Sales Performance Management (SPM) provider to global companies across multiple industries. Callidus Software SPM systems allow enterprises to develop and manage incentive compensation linked to the achievement of strategic business objectives.

Customers and Partners include CUNA Mutual, DirecTV, IBM, Philips Medical, Key Bank, Allianz, Vodafone Spain, US Bank, Cadence, Eaton Vance, and Accenture.

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The Value of Certification

Certification speaks volumes about your professional abilities. By completing the Callidus Software Certification Program, you are recognized as an expert in SPM. Whether on your business card, letterhead or resume, your Callidus Software Certification indicates you meet the highest levels of SPM professional performance. As business changes, the Callidus Software Certification Program enables you to keep pace with the most current developments in SPM, network with fellow professionals, and gain skills you can apply immediately.

Callidus Software Certifications are organized by individuals 'tracks'. And certification attainment is the means to solidifying specific skills in a specified job role. The Callidus Software Certification Program validates that you have learned the specialized skills needed for implementing the suite of Callidus Software products. Callidus Software offers a variety of certifications to help you make the most of your professional expertise. The requirements set forth for certifications offered under the Callidus Software Certification Program apply worldwide.

Certification Benefits

Worldwide Certified Expert Recognition

The Callidus Software Certification Program enables the successful implementation of the Callidus Software SPM solution. Earning certification status acknowledges your expertise in Callidus Software products.

Competitive Advantage

Our certification program gives you the tools to stay ahead of your competition. As a certified expert, you provide value to your customers by learning how to deliver the solutions and services that will ensure first place in SPM.

Use of Callidus Software Certification logo

Once certification is complete, you can place the Callidus Software Certification logo on your business card. This allows the business community to recognize you as a certified Callidus Software specialist in your particular area of expertise.

Earning Certification – A Three-Step Process

You are considered Certified upon completion of the following requirements in the order outlined:

Step 1: Submit certification application

Step 2: Complete required courses and pass examinations

Step 3: Letter of Recommendation (LOR)

Certification Tracks

Track 1 – Certified Compensation Specialist (CCS)

Track 2 – Certified Data Specialist (CDS)

Track 3 – Certified Report Specialist (CRS)

Step 1: Certification Application

Fill out and send in application (found at the end of this guide).

Step 2: Complete Courses and Pass Exams

Certified Compensation Specialist (CCS)

The CCS Certification is for those who wish to develop superior knowledge and skills in SPM, strategically aligning and effectively managing compensation practices.

Version 6.x and Monaco

Course or Exam Name	Media	6x / Monaco
Compensation Management Basics	VILT or EL	•
Rule Writing 1 Advanced Course	VILT	•
Rule Writing 2 Advanced Course	VILT	•
Certified Compensation Specialist - Section I – Online Exam	Exam	•
Certified Compensation Specialist - Section II – Hands On Exam	Exam	•
Letter of Recommendation (LOR)	LOR	•

VILT = Virtual Instructor Led Training

EL = E - Learning

SS = Self-Study

LOR = Letter of Recommendation

• = Required for Certification

○ = Strongly Recommended

Note: Exams require a minimum of 70% for passing

If you are currently CCS Certified in a previous Callidus Software version, your migration path to keeping your Certification current will be as follows:

Course or Exam Name	Media	6.x
Compensation Management Basics Delta	EL	•
Certified Compensation Specialist - Section I – Online Exam	Exam	•

Certified Data Specialist (CDS)

The CDS Certification is for those who wish to develop deep knowledge of the data manipulation and efficient database management in the Callidus Software application.

Version 6.x and Monaco

Course or Exam Name	Media	6.x
Compensation Management Basics	VILT or EL	•
Data Administration (Advanced Course)	VILT	•
Certified Data Specialist - Section I – Online Exam	Exam	•
Certified Data Specialist - Section II – Hands On Exam	Exam	•
Letter of Recommendation (LOR)	LOR	•

VILT = Virtual Instructor Led Training

EL = E - Learning

SS = Self-Study

LOR = Letter of Recommendation

• = Required for Certification

○ = Strongly Recommended

Note: Exams require a minimum of 70% for passing

If you are currently CDS Certified in a previous Callidus Software version, your migration path to keeping your Certification current will be as follows:

Course or Exam Name	Media	6.x
Compensation Management Basics Delta	EL	•
Certified Data Specialist - Section I – Online Exam	Exam	•

Certified Reporting Specialist (CRS)

The CRS Certification is for those who require detailed knowledge of creating and managing reports.

Version 6.x and Monaco

Course or Exam Name	Media	6.x / Monaco
Compensation Management Basics	VILT or EL	•
Callidus Reporting and Analytics (Advanced Course)	VILT	•
Certified Reporting Specialist - Section I – Online Exam	Exam	•
Certified Reporting Specialist - Section II – Hands On Exam	Exam	•
Letter of Recommendation (LOR)	LOR	•

VILT = Virtual Instructor Led Training

EL = E - Learning

SS = Self-Study

LOR = Letter of Recommendation

• = Required for Certification

○ = Strongly Recommended

Note: Exams require a minimum of 70% for passing

If you are currently CRS Certified in a previous Callidus Software version, your migration path to keeping your Certification current will be as follows:

Course or Exam Name	Media	6.x
Compensation Management Basics Delta	EL	•
Certified Reporting Specialist - Section I – Online Exam	Exam	•
Certified Reporting Specialist - Section II – Hands On Exam	Exam	•

Step 3: Complete Letter of Recommendation (LOR)

Successfully submitting and obtaining approval of a Letter of Recommendation (LOR) marks one of the final steps in achieving Callidus Software Certification. In addition to the successful completion of all certification requirements, the LOR allows the Callidus Software Certification team to validate the project-related activities completed by a certification candidate while performing his/her daily job and/or project assignment(s). There are LOR templates for the Certified Compensation Specialist (CCS), Certified Reporting Specialist (CRS), and Certified Data Specialist (CDS) tracks, which contain details and requirements specific to that track.

The information contained in this document highlights the mandatory guidelines, and answers basic questions for individuals ready to complete and submit a LOR for any certification track.

Callidus Software LOR Templates

Each LOR template (regardless of the certification track) consists of boiler-plate introductory information and concluding questions. The body sections of the LOR templates contain a track-specific list of on-the-job projects and/or activities from which the candidate can choose. The body information varies depending on the track the candidate is pursuing.

Instructions are embedded in the LOR templates making them easy-to-navigate, and to help with entering the project-related achievements. Generic fields (e.g., <First Name><Last Name>) are also embedded in the templates to indicate the specific information and/or the format in which the information should be input.

You can download LOR templates from the Education section of the Callidus Software Web site at: www.CallidusSoftware.com.

On-The-Job Projects and Activities

A checklist of unique on-the-job projects and activities make up the body of a CCS, CDS, or CRS LOR templates. Completing the designated number of these projects or activities allows the candidate to demonstrate they are prepared for certification. High-level descriptions are included in the body area of the template for each project and activity. The list varies depending on the certification track. The projects or activities listed are highly relevant to the specific certification track candidate is pursuing. The person completing the LOR needs to indicate which projects or activities the candidate has successfully completed.

Qualified LOR Signatures

The person who completes and signs the LOR for a certification candidate must be able to personally validate that the candidate completed the projects and/or activities documented in the LOR. He/she also needs to provide their contact information (phone number and email) at the bottom of the LOR. Based on the candidate's type of employment, a qualified LOR signature can be obtained from someone who holds one the following management roles:

- A direct supervisor, manager, or director - if the candidate is working as an employee for a Callidus Software customer
- A project manager or team leader - if the candidate is working in a consulting role

Transmitting the Letter to Callidus Software

Once the LOR is completed and signed, send it to the Callidus Software Training Center using one of the following delivery methods:

Via Fax:

Please include a cover sheet with the following information:

Callidus Software Training Center

Attn: Callidus Software Certification

Re: Callidus Software Certification LOR for <First Name><Last Name>

Fax Number: 512-502-9953

Via Mail:

Callidus Software Training Center

Callidus Software Inc.

9050 Capital of Texas Hwy North

Suite 220

Austin, TX 78759

Via Email:

Email: education@callidussoftware.com

Subject Line: Callidus Software Certification LOR for <First Name><Last Name>

Please note: If sending as soft copy only, include a digital signature in the LOR document.

More Questions? Contact the Callidus Software Certification Team

Email: education@callidussoftware.com

Fax Line: 512-502-9953

Phone Number: 866-622-2089

Callidus Software Corporate Headquarters

Callidus Software Inc.

6200 Stoneridge Mall Road, Suite 500

Pleasanton, CA 94588

Phone: 925-251-2200

Fax: 925-251-0525

Certification Application

Completing this form serves as notification of your intent to pursue certification.

Application For: _____ CCS _____ CDS _____ CRS

Primary Mailing Address Information: _____ Business _____ Home

Name: _____ Title: _____

Employer: _____

Address: _____

City: _____ State/Prov: _____ Country: _____ ZIP: _____

Primary Email Address: _____ Estimated Completion Date: _____

Secondary Email Address: _____ Shirt Size: _____ S _____ M _____ L _____ XL

Standards of Professional Practice

The Callidus Software Standards of Professional Practice for Certified Compensation Specialists, Certified Data Specialists and Certified Reporting Specialists were adopted to promote and maintain the highest level of ethical conduct in the profession. By adopting these standards, Callidus Software is further enhancing the value of your certification by providing a uniform way in which all professionals should conduct themselves. Newly designated professionals are required to adhere to the following standards of professional practice.

Responsibility to the Public

- Legal – Comply with all governmental laws and regulations that govern employment compensation, benefits and total reward practices within Sales Performance Management (SPM).
- Advocacy – Encourage my employer to enact SPM programs that recognize the individual rights, privileges, contributions and opportunities.

Responsibility to My Employer/Clients

- Integrity/Conflicts of interest – Perform my professional services with honesty and integrity. These include that of fully informing my employer/clients of my areas of professional competence; by limiting my professional activities to those areas of practice in which I have the requisite knowledge and training; and avoiding all conflicts of interest with my professional responsibilities.
- Designation Use – Respect and abide by regulations that govern my use of the CCS, CDS and CRS designations, and will immediately cease use of these designations when my skills or Callidus Software certification are no longer professionally current, and in venues in which I am no longer serving as and Sales Performance Management professional.
- Objectivity – Honestly and completely advise my employer/client on best practices regarding employment compensation, benefits and total rewards practices.
- Due Diligence – Discharge my professional responsibilities with competence and diligence.
- Confidentiality – Maintain the confidentiality of professional information that is entrusted to me by my employer/client.

Responsibility to Colleagues

- Respect – Treat co-workers and other colleagues with respect, fairness and advocate conditions of employment that safeguards their rights and welfare.
- Collaboration and Encouragement – Strive for excellence in the profession by not only maintaining and enhancing our own knowledge and skills, but also by sharing information with colleagues encouraging the professional development of co-workers and colleagues, and fostering the aspirations of co-workers and colleagues as potential members of the profession.
- Integrity – Practice the highest standard of integrity in business and professional dealings with other individuals in the field.

Signature: _____ Date: _____