



The Association with
Collaboration at its Core.



COP

Application Guide

Requirements for Becoming a COP

Certified Outsourcing Professional

To become a Certified Outsourcing Professional (COP) an individual must demonstrate both the practical experience and the knowledge it takes to successfully lead outsourcing initiatives that have a high-probability of achieving an organization's intended outcomes. Candidates do this by completing an online application that is reviewed and judged by peers who are themselves Certified Outsourcing Professionals (COPs).

The application utilizes a point system with 150 points required for completion. Points are accumulated by documenting specific project experience against 10 Standard Categories deemed critical to success as an outsourcing professional. At least 50 points (up to the total requirement of 150 points) must be experience-based. Additional points, up to 100, are accumulated by documenting relevant education, and/or by completing training listed in the Outsourcing Professional Course Catalog (OPCC).

Experienced-based points are earned by documenting in the application one or more projects where one or more of the Standards Categories have been demonstrated. Experience-based points are earned as follows:

- ▢ **5 pts** for each successfully demonstrated standard category. Each standard category cannot be used more than 3 times within an application.
- ▢ No more than **10 pts** can be earned in a standards category for multiple projects within a single company

Knowledge and Training-based points are earned through:

- ▢ **25** points for post-graduate degree within the field of business (ie., MBA, MPA, JD or other relevant equivalents)
- ▢ **75** points for successfully completing the COP Master Class
- ▢ **15** points for completion of the Outsourcing Governance Workshop
- ▢ Completing training demonstrated in IAOPs Course Catalog

Outsourcing Experience

At least 50 points (up to the total requirement of 150 points)
must be experience-based



Outsourcing Knowledge

Up to 100 points can be earned
by demonstrating knowledge or
through education



Outsourcing Knowledge

150 points

Document Outsourcing Experience

The key to efficiently completing the experience section of the COP application is gaining a firm understanding of the depth and breadth of the work you've done in relation to the 10 Standards Categories. The goal is to demonstrate at least 50 experience-based points (the minimum required for certification) up to the total requirement of 150 points.

The recommended steps are to: assess your project experience relative to the Standard Categories; decide which of those projects will enable you to earn the greatest number of experience points against the standards; collect the relevant information needed to complete the online application for each project chosen.

Note: the standards document is available for download in the Professional Development Resources section of the IAOP website: <http://www.iaop.org/Content/23/193/3040/Default.aspx> and is also viewable within the online application itself.

The following **Experience Worksheet** can be helpful in assessing your project experience and selecting which project to use for the application.

Part 1: Project Experience

Use Experience Worksheet Part I – Project Experience to write brief outlines of the outsourcing projects you have worked on during the past five years. (Projects where your involvement ended more than 5 years ago will not be counted toward certification.)

This worksheet helps you accomplish two things:

1. Determine which projects you've had the greatest amount of outsourcing experience on relative to the standards.
2. Serve as a starting point for filling in the Project Overview in the online application.

For each project, you'll first write a brief outline addressing the size, scope, objectives, and actual outcomes achieved as well as your overall role and responsibilities. On the online application, you will also be asked to include information about the company and where the work was done. (Note: Although the online application permits 10 projects only five are shown below.)

Then, for each project listed, check off each of the 10 Standard Categories that you can map. Remember that each Standards Category you map for each project is worth 5 points. However, **no more than 15 points can be earned for any single Standards Category and no more than 10 points can be earned for a Standards Category for multiple projects within the same company.** In the application itself you will provide in detail a 100-200 word description.

PROJECT 1

Company: _____

Project Outline: _____

- | | |
|---|-------|
| 1. Standard for Defining and Communicating Outsourcing as a Management Practice | _____ |
| 2. Standard for Developing and Managing an Organization's End-to-End Process for Outsourcing | _____ |
| 3. Standard for Integrating Outsourcing into an Organization's Business Strategy | _____ |
| 4. Standard for Creating and Leading Outsourcing Project Teams | _____ |
| 5. Standard for Developing and Communicating Outsourcing Business Requirements | _____ |
| 6. Standard for Selecting Outsourcing Service Providers | _____ |
| 7. Standard for Developing the Financial Analysis and Pricing an Outsourcing Opportunity | _____ |
| 8. Standard for Developing and Negotiating the Contract for an Outsourcing Agreement | _____ |
| 9. Standard for Managing the Transition to an Outsourced Environment, including Outsourcing's Impact on Employees and Communities | _____ |
| 10. Standard for Outsourcing Governance | _____ |

Total Experience Points for This Project _____

PROJECT 2

Company: _____

Project Outline: _____

- | | |
|--|-------|
| 1. Standard for Defining and Communicating Outsourcing as a Management Practice | _____ |
| 2. Standard for Developing and Managing an Organization's End-to-End Process for Outsourcing | _____ |
| 3. Standard for Integrating Outsourcing into an Organization's Business Strategy | _____ |
| 4. Standard for Creating and Leading Outsourcing Project Teams | _____ |
| 5. Standard for Developing and Communicating Outsourcing Business Requirements | _____ |
| 6. Standard for Selecting Outsourcing Service Providers | _____ |
| 7. Standard for Developing the Financial Analysis and Pricing an Outsourcing Opportunity | _____ |
| 8. Standard for Developing and Negotiating the Contract for an Outsourcing Agreement | _____ |
| 9. Standard for Managing the Transition to an Outsourced Environment,
including Outsourcing's Impact on Employees and Communities | _____ |
| 10. Standard for Outsourcing Governance | _____ |

Total Experience Points for This Project _____

PROJECT 3

Company: _____

Project Outline: _____

- | | |
|--|-------|
| 1. Standard for Defining and Communicating Outsourcing as a Management Practice | _____ |
| 2. Standard for Developing and Managing an Organization's End-to-End Process for Outsourcing | _____ |
| 3. Standard for Integrating Outsourcing into an Organization's Business Strategy | _____ |
| 4. Standard for Creating and Leading Outsourcing Project Teams | _____ |
| 5. Standard for Developing and Communicating Outsourcing Business Requirements | _____ |
| 6. Standard for Selecting Outsourcing Service Providers | _____ |
| 7. Standard for Developing the Financial Analysis and Pricing an Outsourcing Opportunity | _____ |
| 8. Standard for Developing and Negotiating the Contract for an Outsourcing Agreement | _____ |
| 9. Standard for Managing the Transition to an Outsourced Environment,
including Outsourcing's Impact on Employees and Communities | _____ |
| 10. Standard for Outsourcing Governance | _____ |

Total Experience Points for This Project _____

PROJECT 4

Company: _____

Project Outline: _____

1. Standard for Defining and Communicating Outsourcing as a Management Practice _____
2. Standard for Developing and Managing an Organization's End-to-End Process for Outsourcing _____
3. Standard for Integrating Outsourcing into an Organization's Business Strategy _____
4. Standard for Creating and Leading Outsourcing Project Teams _____
5. Standard for Developing and Communicating Outsourcing Business Requirements _____
6. Standard for Selecting Outsourcing Service Providers _____
7. Standard for Developing the Financial Analysis and Pricing an Outsourcing Opportunity _____
8. Standard for Developing and Negotiating the Contract for an Outsourcing Agreement _____
9. Standard for Managing the Transition to an Outsourced Environment,
including Outsourcing's Impact on Employees and Communities _____
10. Standard for Outsourcing Governance _____

Total Experience Points for This Project _____

PROJECT 5

Company: _____

Project Outline: _____

1. Standard for Defining and Communicating Outsourcing as a Management Practice _____
2. Standard for Developing and Managing an Organization's End-to-End Process for Outsourcing _____
3. Standard for Integrating Outsourcing into an Organization's Business Strategy _____
4. Standard for Creating and Leading Outsourcing Project Teams _____
5. Standard for Developing and Communicating Outsourcing Business Requirements _____
6. Standard for Selecting Outsourcing Service Providers _____
7. Standard for Developing the Financial Analysis and Pricing an Outsourcing Opportunity _____
8. Standard for Developing and Negotiating the Contract for an Outsourcing Agreement _____
9. Standard for Managing the Transition to an Outsourced Environment,
including Outsourcing's Impact on Employees and Communities _____
10. Standard for Outsourcing Governance _____

Total Experience Points for This Project _____

Part 2: Documenting Knowledge and Training Worksheet

A maximum of 100 points can be earned by demonstrating knowledge or through education. By reviewing this page, you can determine how many points you have already earned and identify additional activities, such as taking the COP Master Class, which may be needed for you to accumulate the total number of points required.

Post-Graduate Degree 25 Points: Please indicate the Post-Graduate Degree earned at the time of application below and complete all applicable contact information. Degrees such as an MBA, MPA, JD and others with a business concentration or focus will apply, as will their global equivalents.

Project 1

Name of Degree: _____ Year Awarded: _____

Name of School or University _____

Address: _____

City: _____ State/Province/Territory: _____

Zip/Postal Code: _____ Country: _____

COP Master Class 75 Points

Please complete the following information if you have attended the COP Master Class. For a list of future class dates and locations, visit www.iaop.org.

Date: _____ Class Location: _____

Instructor: _____

Outsourcing Governance Workshop 15 Points

Please complete the following information if you have attended the Outsourcing Governance Workshop.

Date: _____ Class Location: _____

Instructor: _____

Outsourcing World Summit 8 Points

Please complete the following information if you have attended the Outsourcing World Summit

Date: _____ Location: _____

Further points can be earned from approved courses and events in the Outsourcing Professional Course Catalog here: <http://www.iaop.org/content/23/193/1706/>

Total Points Earned in Knowledge and Training _____

Total Application Points Assessment

Use this sheet to summarize the total number of points you expect to document on your COP Application.

Use the information gathered from Part I: Project Experience to determine how many experience points you have earned. Remember, you will need to earn at least 50 experience points in order to be awarded a COP designation.

Project 1	_____
Project 2	_____
Project 3	_____
Project 4	_____
Project 5	_____

Total Experience Points _____

Use the information entered in the Part II: Documenting Knowledge and Training section earlier in the guide to determine how many points you have already earned.

Total Knowledge and Training Points _____

Total Application Points _____

Completing the Online Application

This section outlines the information required when completing the online application. You can use this guide to collect the information needed before entering it into the actual online application. This may expedite the process for you.

Application Part 1 - Experience Documentation

Below is the information that you will be asked to provide in **Application Part 1 – Experience Documentation**.

STEP 1 – COMPANY INFORMATION

Please provide the following information for the company for which you will be documenting project experience.

Company: _____

Address: _____

City: _____ State/Province/Territory: _____

Zip/Postal Code: _____ Country: _____

Web Address: _____

STEP 2 – COMPANY INFORMATION

Please provide details about one or more outsourcing projects at this company that you are currently working on or have completed in the past five years. (Projects where your involvement ended more than five years ago are generally not eligible for points toward certification as a COP). Copy this page to document additional projects for the above company. You may claim points on all work that was done on these projects prior to the project end-date.

Project Name: _____

It is recommended that you use a Project Name that will be recognizable by your sponsoring executive.

Your Position Title on this Project: _____

Start Date: _____ End Date: _____

All experience from the start to the end date of your involvement can be included in this application, even if the work itself was performed more than five years ago.

Project Role: _____

Please note that your project role is not necessarily the same as your position title.

On this project was your role primarily as a: ☐ Customer ☐ Provider ☐ Advisor

PROJECT OVERVIEW – Use the information obtained from the Project Outline portion of Part I of this guide as a baseline to complete this part of the application. You will need to include sufficient information to enable a reviewer to understand the size, scope, objectives, and actual outcomes achieved as well as your overall role and responsibilities. You will be asked to include information about the company itself and the locations where the work was done and/or outsourced to.

SPONSORING EXECUTIVE CONTACT – Please identify an executive contact for this project. This individual will attest to the work you did on the project by signing off on your work experience. This is an electronic process. Please note that this individual does not need to be currently employed by the company where the work was done.

Executive Name: _____ Executive Title: _____

Company Name: _____

Company Address: _____

City: _____ State: _____

Zip/Postal Code: _____ Country: _____

Phone Number: _____ Email: _____

Relationship to Executive: _____

STEP 3 – MAP STANDARD CATEGORIES

Use the information from Part I- Map Projects to Standard Categories to help complete this section. Each Standards Category for each Project requires a short (100 to 200) word discourse stating the specific work you did that demonstrates the capabilities required by the standards in that category.

(Note: The online Summary tab can be used to keep track of your projects, mapped Standards Categories, and point totals.)

APPLICATION PART II / KNOWLEDGE AND TRAINING – Use the information from the earlier section Documenting Knowledge and Training to complete this section of the application.

APPLICATION PART III: CODE OF ETHICAL & BUSINESS PRACTICE STANDARDS FOR OUTSOURCING PROFESSIONALS – To become a Certified Outsourcing Professional (COP), you must review and agree to the Code of Ethical & Business Practice Standards for Outsourcing Professionals. These can be viewed or downloaded from <http://www.iaop.org/Content/23/193/3040/Default.aspx>

Beginning and Submitting the Online Application

To begin the actual COP Application, log into the IAOP website and click on MY IAOP. Under MY ACTIVITIES you will see the registration link “Apply COP.”

Once you have documented 150 points, use the ‘Submit Application’ button to send your completed application for review by the training and certification committee.

IAOP will submit your projects to the identified project sponsoring executive for their review and sign off via email.

If at any time you have questions or problems, please contact the International Association of Outsourcing Professionals® (IAOP®) at +1.845.452.0600 ext 123 or email copprograms@iaop.org.