



**COP** CERTIFIED OUTSOURCING  
**PROFESSIONAL**®

**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:

*5pts for each successfully demonstrated standard category. Each standard category cannot be used more than 3 times within an application.*

*No more than 10pts can be earned in a standards category for multiple projects within a single company.*

*Each project mapped must not exceed an end date of more than 5 years from date application is submitted.*

**Knowledge and Training-based points** are earned through:

*25 points for post-graduate degree within the field of business (i.e., MBA, MPA, JD or other relevant equivalents)*

*75 points for successfully completing the COP Master Class*

*15 points for complete of the Outsourcing Governance Workshop*

*Completing training demonstrated in IAOPs Course Catalog*

<p><b>Outsourcing Experience</b> At least 50 points (up to the total requirement of 150 points) must be experience-based.</p>	+	<p><b>Outsourcing Knowledge</b> Up to 100 points can be earned by demonstrating knowledge or through education</p>	=	<p><b>Outsourcing Knowledge</b>  <b>150 points</b></p>
---	---	--	---	--

### 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 relationship 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 are 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 I: 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 for each standard category chosen relating to the work you performed that related to that specific standard.

### PROJECT 1

Company:

Project Outline:

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

**Total Experience Points for This Project**

## PROJECT 2

Company:

Project Outline:

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

**Total Experience Points for This Project**

## PROJECT 3

Company:

Project Outline:

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

**Total Experience Points for This Project**

## PROJECT 4

Company:

Project Outline:

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

**Total Experience Points for This Project**

## PROJECT 5

Company:

Project Outline:

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

Address1:

City:

State:

Country:

Zip/Postal Code:

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:

Custom

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 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 signoff 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 [copprogramservices@iaop.org](mailto:copprogramservices@iaop.org).