

Certified Instructor Program

Program Guide

2023



Contents

Introduction.....	3
About the Certified Instructor Program	3
About Certified Instructors.....	3
About Certification	3
Certification Timeline for Completion.....	3
Program Policies and Procedures	4
Certification Offerings.....	4
Pricing Structure.....	4
Certification Process	5
Step 1 – Pre-requisite for Certification.....	5
Step 2 – Register for Certification.....	5
Step 3 – Agreement and Presentation Skills	6
Step 4 – Teach-back.....	7
Certification and Membership benefits	8
Certification Maintenance	10
Purpose of Certification Maintenance.....	10
Maintenance Requirements.....	10
Appendices	11
Appendix A – Program Guidelines.....	11

Introduction

About the Certified Instructor Program

The Certified Instructor Program supports partners delivering training to our mutual customers, by providing easier access to instructional content and training delivery best practices. The program is designed for individuals to achieve a certified instructor distinction and be recognized for high quality training delivery standards. This helps expand the community of experts delivering training to our mutual customers. Candidates are required to complete certain steps to ensure effective training delivery skills and demonstrate product knowledge. Certified Instructors will have access to a library of training materials, resources, tools, and access to an exclusive Certified Instructor community.

About Certified Instructors

The certification program is designed for current or aspiring training instructors who already possess a professional background and expert knowledge in their domain. Certified Instructors have already developed strong domain knowledge through the curriculum required to achieve their Sage consultant certifications. These instructors are either employed with a Sage partner or Sage colleagues responsible for delivering training through Sage University. The program aims to equip them with the necessary expertise and skills to excel in their roles, ensuring they can deliver high-quality training and stay up-to-date with the latest developments and best practices within the Sage ecosystem.

About Certification

The Certified Instructor Program is a professional designation program and not a certificate program. Where a certificate program is designed to provide training needed to acquire knowledge, skills, or competencies in the knowledge domain area, this certification program is designed to assess an individual's existing knowledge, skills or competencies independent of instruction or training.

Certification Timeline for Completion

Candidates are given one year to successfully complete the certification components. If unable to complete the certification within this timeframe, contact the Certified Instructor Program (sagecertifiedinstructor@sage.com) to request an extension and provide reason. Failure to complete the certification within one year without requesting an extension may result in a failure from the program and candidates will need to reapply.



Program Policies and Procedures

Candidates are required to:

- Abide by the the Certified Instructor Program Terms and Conditions upon registration ([as referenced in Appendix A](#)).
- Read and agree to the Sage University Terms and Conditions ([as referenced on Sage University](#)).
- Read and agree to the Sage City Community Usage Guidelines ([as referenced on Sage City](#)).

Certification Offerings

The Certified Instructor Program offers the following Instructor Certifications for Sage X3 Certified Consultants:

- Sage X3 Certified Technical Instructor
- Sage X3 Certified Financial Instructor
- Sage X3 Certified Distribution Instructor
- Sage X3 Certified Manufacturing Instructor

Pricing Structure

Our certification program employs a pricing structure that takes into account product and regional variations. Once approved, a one-time fee is incurred for each certification.

The initial certification is available at a standard price, providing participants with a foundational certification in their chosen domain. Any additional certifications obtained thereafter are offered at a reduced rate, encouraging individuals to broaden their expertise.

This certification program has no maintenance fees , offering instead a straightforward approach to the ongoing validity of the certification by fulfilling maintenance requirements outlined in the program guide's section on certification maintenance.

Certification Process

Step 1 – Pre-requisite for Certification

Potential candidates interested in pursuing one of the certification paths must be employed by a Sage Business Partner who is in good standing with Sage, and demonstrate their expertise in the related domain by holding requisite consultant certification with their SageU profiles:

Sage X3 Certified Technical Instructor

- Sage X3 Certified System Engineer,
- and Sage X3 Certified System Administration Consultant

Sage X3 Certified Financial Instructor

- Sage X3 Certified Financial Application Consultant

Sage X3 Certified Distribution Instructor

- Sage X3 Certified Distribution Application Consultant

Sage X3 Certified Manufacturing Instructor

- Sage X3 Certified Manufacturing Application Consultant

Step 2 – Register for Certification

To enroll into a Certified Instructor path you must be employed by Sage partner and have a SageU profile including a partner account number.

If you are new to Sage University, visit sageu.com to create a profile including your partner account number to ensure you have access to our partner training. If you have questions about creating a profile and including your partner account number Sage University advisors can be contacted for help (sageu.com/contact-us).

If you have a Sage U partner profile ready, visit the Certified Instructor Program page (sageu.com/scip) and select *Log into Sage University*.

Select a Certified Instructor path by scrolling down to view available Certified Instructor paths, and selecting the *Enroll* button for your chosen path.

Complete your registration by selecting the *Add to Cart* button from the learning package page for your chosen Certified Instructor path, navigating to the Shopping Cart, and processing the registration payment. A confirmation email will be sent later and the learning package will be available from your SageU profile transcript.

If you decide to pursue more than one domain, complete the initial Certified Instructor path before registering for any others, to enable the reduced pricing for subsequent Certified Instructor learning packages.

Step 3 – Agreement and Presentation Skills

Access Your Learning Resources

After you have completed the pre-requisites and successfully registered, it is time to start completing the learning package.

Log in with your Sage U profile.

Navigate to your transcript to view the list of the courses you are enrolled in.

Access your Certification Package by locating it in the transcript and select the *Open Curriculum* button next to it.

Complete the Agreement

Before you can begin with the learning materials, there is an document listing the terms and conditions you need to review and agree to. This step ensures you understand the expectations and guidelines of the program.

Select the Agreement section to view details, and launch the *CI - Certified Instructor – Guidelines*.

Review and Accept by carefully reading through the agreement presented. If you agree to the terms and conditions, select the *I Agree* button to complete and close the document.

Complete the Presentation Skills eLearning

A significant component of the Certified Instructor Program involves improvement of presentation and facilitation skills. This is a valuable skill set that has applications across various professional domains.

Access the Presentation Skills Course by locating and selecting the *Presentation Skills* section, then select the *Launch* button next to the Presentation Skills.

Content of this course provides an overview of your role as an instructor and the considerations you will need to make when facilitating training sessions:

- Leverage techniques and strategies to motivate and engage learners
- Understand adult learning styles
- Control class pace, tone, and range
- Prepare for effective delivery in virtual and classroom environments
- Satisfactorily conclude a class for participants
- Gather and share lessons learned and ideas for improvement with peers

Complete the course by reviewing all the modules. You should now have a solid grasp of the principles of impactful training session facilitation that you will need to use in the assessment.

Complete the Presentation Skills Assessment

To evaluate application of the facilitation skills you have reviewed, a presentation skills assessment is included. This assessment is designed to measure your acquisition of the information presented during the Presentations Skills course.

Access the Assessment by locating and selecting the Presentation Skills section, then select the *Launch* button next to Presentation Skills Assessment.

Proceed through the questions, reading carefully to understand and answer each question. If you were not able to pass on the first attempt, review the Presentation Skills course again before a second attempt of the assessment.

Complete the assessment by achieving the minimum score requirement of 80%. With the assessment completed you will soon receive an email within a few days with information about your teach-back.

Step 4 – Teach-back

Confirm your teach-back schedule

After successfully passing your Presentation Skills Assessment, you will receive an email describing the next-steps and resources to understand the assessment criteria and prepare for your Teach-back.

A Mentor Instructor will contact you within a few days to schedule your Teach-back sessions, reply to confirm your session dates or adjust the dates to better suit your schedule. Failure to respond may result in rescheduling or registering a scheduled teach-back as a failed attempt.

Teach-back sessions

Teach-back preparation will be your opportunity to meet with your Mentor Instructor, review learning objectives for the content options available, confirm expectations or requirements, and ask question about anything you may still be unsure of. Before this session, candidates are encouraged to review the rest of this document to consider the criteria that will be used to assess their teach-back performance and the topics they can choose from to build their presentation.

Teach-back assessment is intended for you to showcase your ability to facilitate training on a topic in your selected application domain. During your presentation, the Mentor Instructor will simulate an attendee's responses and reactions, while also confirming your performance in the teach-back assessment criteria.

Teach-back feedback will give your Mentor Instructor the opportunity to provide feedback on your performance. This is an opportunity to learn of any areas you may need to improve, areas you are already skilled in, and how you can develop further.

Format

All sessions will take place as online meetings using videoconferencing. To communicate in the face-to-face online meetings, you also need a microphone, webcam, and reliable internet connection are also be needed.

Attempts

Candidates will be contacted by a Mentor Instructor, to schedule their Teach-back sessions. Candidates are provided with 2 attempts to successfully meet the Teach-back assessment criteria. A candidate who fails their first attempt, will be contacted to schedule their second attempt. A candidate who fails their second attempt, will have failed the Certified Instructor Program for their selected domain, with the opportunity to improve in areas highlighted by the mentor's feedback and reapply after 6 months.

Late arrival, rescheduling, and cancellation

If a candidate needs to reschedule a teach-back, they must contact the Certified Instructor Program (sagecertifiedinstructor@sage.com) at least 2 working days before the teach-back session begins to avoid its registration as a failed attempt.

- Late arrival without notification to a confirmed attempt date, may result in the registration as a failed attempt, based on the mentor instructor's consideration.
- If the candidate is absent for a confirmed attempt date, the candidate will be contacted to reschedule their attempt.
- If the candidate is absent for consecutive confirmed attempt dates, the attempt will be registered as failed attempt.
- If the candidate shows no activity in completing their certification after 12 months, the certification for their selected domain will be canceled, with the opportunity to reapply.

Data retention

Mentor-instructors may record teach-back sessions to help in assessing a candidate's performance. Session recordings are only retained up to the date the candidate completes the certification, or the certification is canceled.

Certification and Membership benefits

After successfully demonstrating your comprehensive knowledge and skills in delivering training in your domain, you will get access to the benefits as a Certified Instructor. Some have additional steps before having full access to them, these steps will be outlined in an onboarding email.

Digital Credential

Now that you have been recognized as a Sage Certified Instructor in your subject matter and can begin sharing the certificate and badge on your social networks or in your email correspondence.

You will receive a congratulations email with a link to your Sage digital credential. If you no longer have that email, you can use the links below to retrieve your credentials, sign into or create an account to access to your credential wallet, or view the directory of Sage credential holders.

[Retrieve a list of all credentials](#) associated with your email address.

[Sign in your credential wallet](#) and easily share them on social networks.

[View the directory](#) of other professionals who are Sage credential holders.

[Reset the password to your credential wallet](#) by visiting the sign-in page and completing the Forgot Password steps.

[Show your credentials in your email signature](#) by signing into your credentials wallet, copying the web address to your wallet, and using it in your email signatures. Giving others the ability to view all the credentials you've earned.

Printed Training Content

As a Certified Instructor you can order printed customer course training materials at a discounted price, set your own ship to addresses, and track your orders and order history online through the Sage University Marketplaces. Giving you the ability to offer your clients up-to-date training materials without having to create it yourself.

Curriculum Marketplaces available to Sage X3 Certified Instructors:

- [Sage X3 Certified Technical Instructor](#)
- [Sage X3 Certified Financial Instructor](#)
- [Sage X3 Certified Distribution Instructor](#)
- [Sage X3 Certified Manufacturing Instructor](#)

Use the following guide to view the training content available in each marketplace: [Sage X3 Curriculum Marketplace Price List & Ordering Guide](#)

Orders through Mimeo are built at the time of the order, and Mimeo has a strict return policy. Please be sure to verify your order prior to checking out. If you have a question about your curriculum orders on Mimeo contact help@markeplace.mimeo.com.

Before you can access the curriculum marketplace for your Certified Instructor domain, please follow these steps:

- Create your Mimeo Print profile on mimeo.com/sign-up
- Contact us with your Mimeo profile name at SageCertifiedInstructor@sage.com
- We will contact you when your profile has access, along with details on how to view the Curriculum Library

Community forum

You will receive an invitation to join the Certified Instructor Community by email from noreply@sagecity.com. If the invite is not available in your inbox, please check your junk mail or [contact us](#) for help with the community invite.

After you've accepted the invitation, come join the discussion by navigating to the community, or select this direct link to the [Certified Instructor Community](#).

If you are new to Sage City and don't have an account, included below are guides on registering an account, navigating to community groups, and posting new questions or discussions on the forum.

[Logging into Sage City or registering for a Sage City account.](#)

[Navigating to groups you are a member of on Sage City.](#)

[Posting your questions or discussion topics in the community forum.](#)

Certification Maintenance

Purpose of Certification Maintenance

Certified Instructor Program maintenance supports continuing education and professional development activities needed for the acquisition of new knowledge to the development of new skills within their domain. There is also an ongoing requirement to maintain their status as a partner able to deliver effective Sage product training.

Maintenance Requirements

In order to satisfy the requirement, Certified Instructors are required to:

- Maintain the pre-requisite product certification
For example, a *Sage X3 Certified Financial Instructor* must maintain their *Sage X3 Certified Financial Application Consultant* certification
- Be employed by a Sage Business Partner that is in good standing with Sage
- Maintain training delivery satisfaction

Appendices

Appendix A – Program Guidelines

Terms and Conditions

You have been accepted to the Certified Instructor Program (CIP), which once completing the Certification Instructor learning path entitles access to customer training materials, training delivery templates, and private community forum. You will have access to a private site whereby to access a Curriculum Library of customer training materials. Customer training materials within the Curriculum Library cannot be modified from their original format and content will be explicitly stated on the document and cannot be modified without the written consent of Sage. If you fail to maintain the pre-requisite certification for the Certified Instructor designation, you must cease and desist using any and all documents obtained through the CIP offerings.

Sage reserves the right to administer the Sage Learning Services Certified Instructor Program at its sole discretion and reserves the right to change the benefits and requirements stated within the program guide. Notification of updates to the Sage Learning Services Certified Instructor Program will be posted on Sage Certified Instructor community forums. Participation in the Sage Learning Services Certified Instructor Program is subject to the Sage Learning Services Certified Instructor Program Terms and Conditions in the Sage Certified Instructor Program Guide.

Sage User Certification and Badges

Some Sage learning material offer user certification and badging in the learning path. Learners must pass the Sage user certification exam to obtain a certification or complete the learning in Sage University to achieve associated badge.

Sage user certification and badges are offered directly through Sage University. All Sage user certification exams require registration through Sage University and may incur a fee separate from the course delivery fees. Certified Instructors may not administer, develop, or offer these exams outside of Sage University.

Sage badges are only achieved when completing learning through Sage University. Sage Certified Instructors must ensure that learners understand Sage user certification and badges are managed directly through Sage University.

Customer Satisfaction Policies

The Certified Instructor Program provides guidelines and content to Certified Instructors to be self-managed Sage product training delivery professionals, so that their client and employers can expect the high quality training delivery. Certified Instructors are required to maintain a satisfactory level of quality standards in training delivery. Sage will require periodic reporting of Certified Instructors training delivered to customers, through satisfaction surveys. Sage has the right to revoke the Certified Instructor status if quality of training is unsatisfactory.

Training Material Notice

The course materials provided are the property of The Sage Group plc or its licensors (“Sage”). Please do not copy, reproduce, modify, distribute or disburse without express consent from Sage.

This material is provided as a general guidance for informational purposes only. Accordingly, Sage does not provide advice per the information included. The use of this material is not a substitute for the guidance of a lawyer, tax, or compliance professional. When in doubt, please consult your lawyer, tax, or compliance professional for counsel. This material is provided on an “as is” basis. Sage makes no representations or warranties of any kind, express or implied, about the completeness or accuracy of this training materials. Whilst Sage may make changes to this training materials at any time without notice, Sage makes no commitment to update the training materials every time Sage’s products are updated



sage.com
0191 479 5911

Sage

©2023 The Sage Group plc or its licensors. All rights reserved. Sage, Sage Logos, and Sage product and service names mentioned herein are the trademarks of Sage Global Services Limited or its licensors. All other trademarks are the property of their respective owners.