



TIPA® Lead Assessor Course (2-Day Classroom Training)

Certified TIPA® Lead Assessors are skilled professionals who lead process maturity assessment projects using the TIPA framework in organizations. The TIPA Lead Assessor course prepares these professionals for taking and passing the TIPA Lead Assessor Exam.

The 2-day classroom course will help the participants to build their skills to:

- Collaborate with executive and top management to define the scope, select the class of assessment and plan of a TIPA assessment project
- Define the TIPA project assessment team structure
- Lead and provide guidance to the TIPA Assessors from start to finish of the assessment project
- Use the TIPA Toolbox to lead an Assessment Project
- Present the results of the assessment and recommendations to the top management of the organization

This 2-day course equips the participant with the ability to lead a process assessment project based on the TIPA framework. The course enables participants to collaborate with executive and top management to define the scope, select the class of assessment and plan of an assessment project, and define the project assessment team structure. The participants will be able to use the TIPA tools to monitor progress throughout the project lifecycle, ensure quality of the assessment and present results and recommendations to all relevant stakeholders.

At the end of this course, participants will be optimally prepared to take and pass the TIPA Lead Assessor Exam and become a TIPA Lead Assessor. Please note that to become a 'Certified TIPA Lead Assessor', evidence of experience has to be provided to the TIPA governing body (See section 'Providing evidence of experience' on page 3).

Audience

Note: To attend a TIPA Lead Assessor course, you must be a certified TIPA Assessor
The TIPA Lead Assessor course will be of interest to:

- Certified TIPA Assessors who would like to lead TIPA assessment projects
- Assessors (CMMI, ISO/IEC 15504 etc.) who would like to use the TIPA methodology to lead process assessments



- Individuals who play a role in assessing and improving processes in an organization and who would like to organize TIPA process assessment
- Individuals who participate in ITSM implementations in organizations and who are interested in organizing TIPA assessments to measure ITSM process maturity for capability determination (either in a supplier selection process or as a benchmarking tool)
- Individuals who are looking for a turnkey-solution for process assessment to estimate the ROI of ITSM implementations in organizations
- Individuals in typical roles (but not limited to): Senior Consultants, Project Managers, Quality Managers, Process Owners, Auditors, process improvement consultants

Learning Objectives

Upon completion of this course and examination, the participant will gain the following competencies:

- Explain the TIPA assessment methodology and the classes of assessment to executive/top management and generate buy in
- Provide the cost of the assessment, using TIPA workload estimation tool (for external consultants)
- Define the scope of the assessment project along with the top management representatives
- Define the structure of the assessment team (roles and responsibilities) and assemble the assessment team
- Provide guidance to the Assessment Coordinator and together with him/her, identify the Interviewees
- Create the assessment project plan, monitor progress, send regular progress update to key stakeholders
- Define the interview plan
- Review the SWOT (Strength, Weakness, Opportunity, and Threat) analysis, recommendations and reports created by the TIPA Assessors and integrate into the Assessment Report
- Present results of the assessment and recommendations to the top management and key stakeholders
- Close the project, review if objectives are met, create lessons-learned log, and plan for improvement of the process assessment process
- Articulate, in detail, the 6 phases of the assessment project
- Use all tools in the TIPA toolbox to perform any or all of the above activities



Prerequisites

Candidates for this course must:

- Be a Certified TIPA Assessor (Candidates can register for a TIPA Assessor and TIPA Assessor courses taking place during the same week. Access to the TIPA Lead Assessor course will then be granted only if the TIPA Assessor exam is passed with success)
- Be able to demonstrate through the provision of a resume that the individual has:
 - At least 3 years of experience in IT Service Management
 - Or at least 2 years of experience in process management or maturity assessments in at least one of the following: ITIL®, CMMI®, ISO/IEC 15504, ISO/IEC 20000, ISO 9001 or COBIT®
 - At least 2 years of project management experience or equivalent experience in leading teams
- It is appreciated if candidates have any of the following additional qualifications: ITIL Expert, ITIL Service Manager, 10 credits accrued through ITIL intermediates

After completing the course and passing the exam, the candidate must register with TIPA (via www.tipaonline.org) as a TIPA Professional Member (as a certified TIPA Assessor for ITIL now completing the Lead Assessor course, you are expected to be a Professional Member in good standing).

Registering as a Professional Member entails agreeing to pay an annual fee that entitles him/her to receive the license to the TIPA toolbox for Lead Assessor, and services such as listing on the official website and yearly updates to the complete toolbox. For more information, see:

<http://www.tipaonline.org/membership/professional-membership>.

After registration, the TIPA Lead Assessor status is granted to the candidate and the person's name is listed on the TIPA website as a TIPA Lead Assessor and TIPA toolbox will be licensed to the individual. The **Certified TIPA Lead Assessor** status and the corresponding certificate is awarded once the candidate can demonstrate evidence of experience in performing assessments as detailed below. The difference between a TIPA Lead Assessor and Certified TIPA Lead Assessor is indicated on the website.

Providing Evidence of Experience

In order to adhere to the highest quality standards for TIPA Assessments, the TIPA Certification Body stipulates the following condition be satisfied by the TIPA Lead Assessor before the status of "Certified TIPA Lead Assessor" is granted:

- Evidence of three TIPA assessments performed out of which two as Lead Assessor, covering a total of ten process instances



- Or evidence of two TIPA assessments performed as Lead Assessor if one of them is coached or supervised by a Certified TIPA Lead Assessor, covering a total of six process instances

Reporting is facilitated through the TIPA member section on the official website; providing the name and organization where the assessment is performed, contact details of the organization's representative, name of Lead Assessor, name of Certified TIPA Lead Assessor (if applicable) and the number of process instances assessed.

Candidates already holding one of the following qualifications do not have to report additional evidence of experience and are directly awarded the Certified TIPA Lead Assessor status.

- Scampi™ Lead Appraiser
- Intacs™ certified Competent or Principal Assessor
- IntRSATM certified Assessor or Principal Assessor

Maintaining the Certification

Maintaining the TIPA Lead Assessor status ensures ongoing, official backing of the TIPA Certification Body (governed by the accreditor, CRP Henri Tudor) and continued certification services for the individual, such as being listed on the official site as a Lead Assessor and receiving updates to the toolbox. Renewal of the Lead Assessor status is done by renewing the TIPA Professional Membership.

Course Organizational Logistics

- A maximum of 12 people can attend this course with 1 instructor; more students require a second instructor
- Classroom with U-shaped seating arrangement, Whiteboard, flipchart, projector
- Course runs 08:00 – 05:00 or 09 :00 – 06 :00 each day

Course Materials Provided to Participant

Participants receive copies of:

- Student Workbook (contains all assignments to be written down in class and a practice exam)
- Student Handbook (course contents including classroom presentations, readings required for the assignments, and sample answers for the assignments)

TIPA Professional Membership for Licensing the Toolbox for Lead Assessor

- Participants receive the tools and Intellectual Property necessary to lead TIPA assessments after registering on the website as a TIPA Professional Member. As a certified TIPA Assessor now taking the Lead Assessor course, the candidate is



expected to be a professional member in good standing – guidance will be provided upon successful completion of the Lead Assessor exam to upgrade membership to Lead Assessor status, pay the additional membership fee applicable for a Lead Assessor, and download the toolbox for Lead Assessor.

More information on membership, cost, terms:

<http://www.tipaonline.org/membership/professional-membership>

Please note that membership fees are sometimes included in course or exam fees.

Note about the Consulting Use of TIPA

- As a Professional Member with access to the toolbox, the member can only use the TIPA framework and toolbox within his/her own company for internal assessments. To offer assessment services commercially (i.e., to other companies), the professional member's organization must get the Consulting Use License to be allowed to use the TIPA Intellectual Property and Trademark for commercial use.

Please check the page <http://www.tipaonline.org/membership> for information pertaining to TIPA Consulting Use License, its benefits and the annual fee applicable, or contact membership@tipaonline.org

About the Examination

- In order for participants to be eligible to take the TIPA Lead Assessor certification exam, they must participate in an accredited TIPA training course for 2 days
- The exam is a closed book exam with eight (8) multiple-choice, scenario-based, gradient-scored questions
- Exam duration is a maximum 90 minutes for candidates in English (participants whose first language is not English, have a maximum of 120 minutes to complete the exam and are allowed to use a dictionary)
- Each question will have 4 possible answer options, one of which is worth 5 marks, one which is worth 3 marks, one which is worth 1 mark, and one which is a distracter and achieves no marks
- Pass score is 28/40 or 70%



Course Agenda

Unit	Subject
Day 1	
	Course Introduction
1	Organization of a TIPA Assessment Project (includes Assignment 1: TIPA Roles Assignment 2: Categories of Tools Assignment 3: Toolbox overview Assignment 4: Classes of Assessment)
2	Responsibilities of the Lead Assessor (includes Assignment 5: Discover Tool T4 in Toolbox)
3	Definition Phase (includes Assignment 6: Select processes to be assessed Assignment 7: Discover Tool T2 Assignment 8: Discover Tool T5 Assignment 9: Discover Tool T6 Assignment 10: FinTRUST - Context Discovery Assignment 11: Discover Tool T9 Assignment 12: FinTRUST - Scope Agreement)
4	Preparation Phase (includes Assignment 13: Discover Tool T11 Assignment 14: FinTRUST - Prepare the Process Rating Sheet Assignment 15: Discover Tool T13 Assignment 16: FinTRUST - Interview Plan Assignment 17: FinTRUST – Kickoff meeting)
5	Assessment and Analysis Phases (includes Assignment 18: Discover Tool T15)
	Homework (review of day's material)
Day 2	
6	Results Presentation Phase (includes Assignment 19: Discover Tool T16 Assignment 20: Discover Tool T17 Assignment 21: FinTRUST - Overall Profile Assignment 22: Discover Tool T18 Assignment 23: FinTRUST - Results Presentation)
7	Assessment Closure Phase (includes Assignment 24: Discover Tool T19 Assignment 25: Discover Tool T20)
8	Improvement Cycle
9	Exam Preparation/Mock Exam
	Exam