



Certified-Master-in-Training Program Description

Current Description or Designation

Certified-Master-in-Training (formerly referred to as Certified Master Candidate or Level 3 Candidate)

Candidates

External Consultant or a Company Employee with desire to pursue the top level of mastery to become a Certified Master & desire to become a contributing member of the The Leadership Challenge® Community. Please see pre-requisite qualifications.

Completion Qualifies the Individual to Provide These Services & Receive These Benefits*

- An endorsed profile as a Certified Master on leadershipchallenge.com
- Deliver Wiley-endorsed standard & customized The Leadership Challenge Workshops & Facilitator Training on-site/within organizations, as well as LPI Coaching
- Deliver Wiley-endorsed public/open enrollment The Leadership Challenge Workshop Facilitator Training for “Trained Facilitator” status when working for a Global Training Partner.
- With appropriate onboarding, deliver on-site/within organizations LPI Coach Training for “Trained Coach” status.
- With appropriate onboarding, deliver Wiley-endorsed public/open enrollment LPI Coach Training for “Trained Coach” status with a Global Training Partner.
- Mentor candidates for all aspects of The Leadership Challenge Certified Facilitator program.

*Entry to the Certified-Master-in-Training program does not provide the qualification; it is successful completion of the program that provides the qualification.

Trained/Mentored By

Minimum of 2 Certified Masters (1 primary and 1 secondary), plus 2-4 Oversight Mentors who provide support via a few conversations. The Primary Mentor must have 3 or more years of experience as a Certified Master. Secondary and Oversight mentors are eligible for their roles upon their own successful completion of the program.

Estimated Completion Time

Typical experience is 18 months to 2 years from time of acceptance to program. After

acceptance, Individual must spend a minimum of 12 months in the program prior to submission of final paperwork.

Cost Investment Per Individual

- \$2,000 non-refundable Mentor Agreement Fee payable to the Primary Certified Master Mentor for the Certified-Master-in-Training through their development process.
- Costs dependent on chosen Area(s) of Expertise:
 - The Leadership Challenge Workshop Facilitation with Implementation Consulting Area of Expertise: Fees associated with services are required, such as Facilitation fees for co-leading a workshop, a Facilitator Training Workshop or time required reviewing coaching sessions, or working with clients on consultations.
 - LPI Coaching with Implementation Area of Expertise: Fees associated with time or services are required for Coaching with the Certified-Master-in-Training and working with clients on consultations
- Travel reimbursement for Primary Mentor for services noted above.
- Additional coaching fees may be determined by Certified-Master-in-Training and Primary Mentor when 10 hours of coaching is exceeded.

Brand Materials Anticipated for Candidate's Development

Materials designated for The Leadership Challenge Workshop Facilitator Training and LPI Coach Training. Every effort should be made to gain familiarity with the other materials in the most current product line, including trade books, training resources, and digital assets.

Pre-requisite Qualifications*

The pre-requisites are as follows:

- Completion of achievement as The Leadership Challenge Certified Facilitator and/or The Student Leadership Challenge Certified Facilitator and/or Certified LPI Coach (Coach Certification is currently in development.)
- Areas of Expertise Pre-requisites:
 - Has facilitated a minimum of 3 The Leadership Challenge Workshops since achieving The Leadership Challenge Certified Facilitator Status & provides evidence which may include submission of daily agendas, outcomes, and slide decks along with documented participant feedback. AND/OR
 - Has experience as a Certified LPI Coach (program in development) with the LPI in doing a minimum of 15 individual leader Debriefings since reaching Certified LPI Coach status. AND/OR
 - Has proven track record of The Student Leadership Challenge implementations since reaching The Student Leadership Challenge Certified Facilitator status & provides evidence in submission of syllabi,

lesson plans/curricula, and slide decks along with documented student feedback.

- Identified a Primary Certified Master Mentor.
- Certified Master Application, which is a Personal Statement of Intent, and which describes:
 - How your professional background makes you a suitable Certified Master candidate
 - How the Certified Master designation will strengthen your future career plans and benefit The Leadership Challenge Community
 - The area(s) of specialty in which you intend to focus to develop a high level of expertise:
 - Workshop Facilitation with Implementation Consulting
 - LPI Coaching with Implementation Consulting
 - The Student Leadership Challenge Implementation
 - Any combination of the above
- Current Resume
- Completion of remaining forms
- Telephone or Video-conference interview with Jim Kouzes or Barry Posner

*Pre-requisite Qualifications are listed for the purpose of transparency and understanding. Once your Primary Certified Master Mentor is identified (bullet #3 above), it is his or her responsibility to put forth your nomination to Wiley by contacting our Certified Master Program Coordinator. The following steps are then managed by the Program Coordinator working with the Certified Master Mentor and candidate.

Criteria for Entry as a Certified-Master-in-Training if Candidate has NOT previously reached The Leadership Challenge Certified Facilitator or Certified LPI Coach or The Student Leadership Challenge Certified Facilitator Status

One of these options:

- Individual has previously facilitated 10 The Leadership Challenge Workshops & provides evidence by submitting daily agendas, outcomes, slide decks along with documented participant feedback.
- Individual has previously facilitated 2 The Leadership Challenge Workshops & 30 LPI individual leader Debriefings and provides evidence by submitting daily agendas, outcomes, slide decks along with documented participant feedback.
- Individual has a proven track record of implementations of The Student Leadership Challenge & provides evidence in submission of syllabi, lesson plans/curricula, and slide decks along with documented student feedback.
- The candidate is approved for entry by Wiley, Jim & Barry.

Certified Master Mentors

- Primary Certified Master Mentor has 3 or more years of experience at the Certified Master level and with whom there is a Mentor Agreement.
- Minimum of one secondary Certified Master Mentor with any length of experience at the Certified Master level, who is recommended by the Primary Mentor and named in the initial application paperwork.

- 2-4 other oversight Certified Master Mentors with any length of experience at the Certified Master level.

(For description of “outsight mentors” refer to Candidate’s Required Milestones below)

Required Actions of a Certified Master to be a Candidate’s Mentor

Primary Mentor:

- Has 3 or more years’ experience as a Certified Master
- Expectations for serving as a Primary Mentor are these:
 - Has a desire to help others explore their potential as experts in The Five Practices of Exemplary Leadership® model and The Leadership Challenge body of work.
 - Has a unique commitment to spending the time required supporting Certified-Masters-in-Training’s development to help them find their voice as The Leadership Challenge & LPI expert.
 - Has a substantial level of experience & expertise with The Leadership Challenge & LPI, including Custom Workshop Experiences & LPI Coaching.
 - Shows evidence of substantive contributions to the The Leadership Challenge Community to be a role model for the Certified-Master-in-Training.
 - Will put forth initial nomination to Wiley of the potential candidate
- Primary Mentor makes the recommendation for the one secondary Certified Master Mentor.
- Primary Mentor is required to work with their Certified-Master-in-Training for a minimum of 10 coaching sessions after acceptance into the program. The coaching sessions will vary depending on the Areas of Expertise the Certified-Master-in-Training has chosen.
- Primary Mentor mutually works with the Certified-Master-in-Training to create the initial Development Plan (Form D) for application to the program.
- Primary Mentor must validate the Certified-Master-in-Training’s growth by updating the Development Plan in each chosen Area of Expertise and submitting with the Progress report.
- Primary Mentor submits a Certified-Master-in-Training’s Progress Report (Form E) and updated Development Plan (Form D) are submitted to Wiley at a minimum of every 6 months an individual is in the program, in line with Wiley’s announced submission cycles.
- Primary Mentor submits Certified Master Candidate Qualification (Form F) once the Certified-Master-in-Training has successfully completed the Developmental Plan. This is the Primary Mentor’s recommendation for the Candidate to be granted Certified Master designation. At least one progress report, submitted at a minimum of 90 days prior, must be on file in order for Wiley to accept the Certified Master Candidate Qualification.

Secondary Mentor:

- Must be a Certified Master in good standing.
- Shares their style and approach to the The Leadership Challenge Workshop and the LPI openly in order to provide candidates with multiple perspectives on delivery of this content.
- Supports the Certified-Master-in-Training for short periods of time based on their own area of specialty
- Documents (via email to Primary Mentor) the mentoring time and content with the Certified-Master-in-Training for inclusion into the Progress Report regarding their Development Plan & cc's the Candidate.
- Supports the Certified-Master-in-Training's final qualification by submitting 1 Letter of Recommendation to the Primary Mentor.

Candidate's Required Milestones

For expertise development in Workshop Facilitation with Implementation

Consulting:

- **Personal Leadership Journey:**
 - In first 1-2 months, Certified-Master-in-Training has coaching opportunity with Primary Mentor to reflect deeply about his/her leadership journey and why this work matters
 - Personal Values
 - Personal Leadership Philosophy
 - Personal Vision
- **The Leadership Challenge Model Content & Research Coaching**
 - Coaching in the first 3 months with Primary Mentor
 - Deepens brand content & research expertise with each The Leadership Challenge Workshop the individual facilitates
- **Confirmation of Completion of the following during The Leadership Challenge Certified Facilitator program:**
 - Co-leads 1 The Leadership Challenge Workshop with a Certified Master Mentor or is observed by a Certified Master Mentor for 1 The Leadership Challenge Workshop.
 - Facilitates at least 2 The Leadership Challenge Workshops & provides evidence to a Certified Master Mentor with participant feedback. The Certified Master Mentor provides pre- and post- workshop coaching for the candidate.
- **One 2-Day Facilitator Training co-facilitated by primary or secondary mentor**
- **One custom organizational development experience with primary or Secondary Mentor as advisors.** Individual demonstrates the ability to consult with clients and advise on the customized use of The Five Practices & 30 Behaviors to address organizational leadership needs.

- **Coaching sessions with Primary Mentor - Actively participate with Primary Mentor in a minimum of 10 coaching sessions after acceptance into program.**
- **2-4 Oversight mentors**
 - Individual chooses an Oversight Mentor by asking: “Who do I NOT know?”... “What is their reputation as a Certified Master?”... “What are they known for in the The Leadership Challenge Community?”... “What are they passionate about?”... “What can I learn from them?”
 - Oversight Mentor is a Certified Master who provides a different perspective than the Individual, and the Primary and Secondary Mentors.
 - Oversight Mentor provides support via a conversation, a few planned conversations with the Individual or a working experience with the Individual that is unique from other Mentors.
 - Oversight Mentor has a rich experience or reputation for mastery with one or more of these: truly models Oversight, masterful with provocative & reflective questions, executive level leadership, multi-industry experiences, executive coaching, international experiences, publishing, public speaking, Community collaboration, customized leadership journey experiences grounded in The Leadership Challenge & the LPI.
- **Multiple Leadership Levels & Industry Experience:**
 - Candidate demonstrates an ability to work with multiple audiences - both by level and industry/field.
 - Individual will prepare and facilitate how to position the value of The Leadership Challenge for organizational development.
- **Minimum choice of 3 from the Optional Milestones** (see OPTIONAL category)

For expertise development in LPI Coaching with Implementation Consulting

- **Personal Leadership Journey:**
 - In first 1-2 months, Certified-Master-in-Training has coaching opportunity to reflect deeply about his/her leadership journey and why this work matters with Primary Mentor
 - Personal Values
 - Personal Leadership Philosophy
 - Personal Vision
- **The Leadership Challenge Model Content & Research Coaching**
 - Coaching sessions in the first 3 months with Primary Mentor
 - Certified-Master-in-Training models competency with The Leadership Challenge Model & LPI Research
 - Coaching with Primary Mentor with candidate’s own LPI Report
- **Expertise with LPI Data Analysis & LPI Coaching - Process is designed in steps to develop expertise with LPI data analysis and LPI coaching:**
 - Step 1: LPI data analysis with a minimum of 5 Sample LPIs from multiple organizational level leaders & from multiple industries

- Sample LPIs are obtained from the Primary Mentor’s resources or those from Global Training Partners with all personal information removed.
 - Certified-Master-in-Training meets in-person or online with Primary Mentor to discuss analysis findings for each LPI.
 - Step 2: LPI Coaching session planning for a minimum of 5 sample leaders using the sample LPIs from Step 1
 - Certified-Master-in-Training uses resources to plan for the sample leader’s coaching session: A Coach’s Guide to Developing Exemplary Leaders + The Leadership Challenge main text
 - Certified-Master-in-Training practices a LPI Coaching session* for each of the sample leaders data with the Primary Mentor serving in the role of the leader (*in-person or online)
 - A Secondary Mentor with LPI analysis and coaching expertise may also support the Certified-Master-in-Training online for this Step
 - Step 3: Minimum of 15 LPI data analyses with actual LPIs of leaders chosen by Certified-Master-in-Training or Primary Mentor
 - In addition, Certified-Master-in-Training uses resources to plan for the leader’s coaching session: A Coach’s Guide to Developing Exemplary Leaders + The Leadership Challenge main text
 - Primary Mentor counsels Certified-Master-in-Training in-person or online in advance of Step 4 regarding analyses and plans for the leader’s LPI Coaching session (Step 4)
 - A Secondary Mentor with LPI analysis and coaching expertise may also support the Certified-Master-in-Training online for this Step.
 - Step 4: Minimum of 15 Coaching sessions with actual leaders chosen by Certified-Master-in-Training or Primary Mentor:
 - Certified-Master-in-Training is counseled in-person or online in advance and then follows-up with the Primary Mentor to discuss the coaching outcome with the leader
 - Certified-Master-in-Training may be observed by the Primary Mentor (either in-person or through audio or video recording) if both agree and the actual leader consents
 - A Secondary Mentor with LPI analysis and coaching expertise may also support the Certified-Master-in –Training (either in-person or through audio or video recording) if both agree and the actual leader consents
- **One custom Organizational Development experience with the Primary Mentor as advisor, in which LPI Coaching is a leadership strategy within a client organization.** Certified-Master-in-Training demonstrates the ability to consult with clients and advise on LPI Coaching to address organizational leadership needs.
- **2-4 Outsight Mentors**
 - Certified-Master-in-Training chooses an Outsight Mentor by asking: “Who do I NOT know?”... “What is their reputation as a Certified Master?” ...

“What are they known for in the The Leadership Challenge Community?”...
“What are they passionate about?”... “What can I learn from them?”

- Oversight Mentor is a Certified Master who provides a different perspective than the Certified-Master-in-Training, and the Primary and Secondary Mentors.
- Oversight Mentor provides support via a conversation, a few planned conversations with the Certified-Master-in-Training or a working experience with the Certified-Master-in-Training that is unique from other Mentors.
- Oversight Mentor has a rich experience or reputation for mastery with one or more of these: truly models Oversight, masterful with provocative & reflective questions, executive level leadership, multi-industry experiences, executive coaching, international or US experiences, publishing, public speaking, The Leadership Challenge Community collaboration, customized leadership journey experiences grounded in The Leadership Challenge & the LPI.
- **Multiple Leadership Levels & Industry Experience:**
 - Certified-Master-in-Training demonstrates an ability to work with multiple audiences - both by level and industry/field.
 - Certified-Master-in-Training will prepare and facilitate how to position the value of LPI Coaching (not Debriefs) for organizational development
- **Minimum choice of 3 from the Optional Milestones** (see OPTIONAL category)

Candidate's Optional Milestones

* Minimum choice of 3 from the options below

- **Case Studies, Customer Stories, & Publications**
 - Case Study Story – Academic case study story of an individual leader with whom the Certified-Master-in-Training has worked. Case Study Story is based upon 1 or more Practices and is submitted to the The Leadership Challenge Primary Mentor for approval.
 - Case Study of individual leaders with whom Certified-Master-in-Training has worked for submission to the next edition of The Leadership Challenge.
 - Client Story of organizations with whom Certified-Master-in-Training has worked for submission to The Leadership Challenge website.
 - Monthly The Leadership Challenge Newsletter
 - Article for Ask an Expert
 - A Masters Give Back story
 - Book/Movie summary related to The Five Practices of Exemplary Leadership
 - Summary of research that can be related back to the model
 - Supporting Research to propose for submission to the next edition of The Leadership Challenge. Those would serve the Certified-Master-in-Training well in underscoring their own research credibility, and be a contribution available to The Leadership Challenge Community.

- **Attend annual Summit + informally connect with Jim & Barry.**
- **Annual Summit Contribution via Breakout Session, Planning Committee, or Pre-conference Session facilitation**
- **Read & discuss with Certified Master Mentor(s) learnings from the books & research co-authored by Jim & Barry or published The Leadership Challenge resources:**
 - Book Publications (Credibility, The Truth About Leadership, A Leader's Legacy, Great Leaders Create Great Workplaces, Turning Adversity into Opportunity, Finding the Courage to Lead, Learning Leadership, Coach's Guide to Developing Exemplary Leaders)
 - Training Materials (The Leadership Challenge Facilitation Set and associated workbooks/handouts)
 - Brand Research Publications (Bringing the Rigor of Research to the Art of Leadership, LPI® Normative Database Narrative, Leadership Practices Inventory: Psychometric Properties)
- **1 public/open enrollment standard 2-Day The Leadership Challenge Workshop with a variety of client industries represented**
- **Masters Give Back The Leadership Challenge Workshops** and Coaching co-facilitated with Primary Mentor or Secondary Mentor, or participate in Masters Give Back event associated with Annual Summit.
- **A personal LPI near the end of Certified-Master-in-Training's development and inviting feedback from those who have supported the Certified-Master-in-Training's progress:**
 - For example, the Observers could be: Primary, Secondary & Oversight Mentors.
 - Follow-up coaching with Primary Mentor and with Certified-Master-in-Training leading the learning. A mutual Development Plan based on the LPI behaviors is the outcome.
- **New exercises or applications developed for workshops &/or LPI Coaching** shared with The Leadership Challenge Community
- **Independent leadership research** conducted and shared with the authors & The Leadership Challenge Community

Commitment to Integrate The Leadership Challenge & LPI Materials for Clients

Commitment to use The Leadership Challenge and LPI materials that are appropriate for the business needs in all Workshops, LPI Coaching or consulting experiences with Primary & Secondary Mentors

After Completion Ongoing Evidence of Expertise and Commitment to The Leadership Challenge Community

No further formal mentoring required once status is awarded as a Certified Master; however, a Certified Master is expected to be a life-long learner and continue to evolve

their The Leadership Challenge & LPI expertise. Please see Maintaining Mastery documentation. No re-certification requirement or CEU requirement.

Program Administration & Management

Administration & Management by Wiley

The following documentation is submitted by the mentor & managed by Wiley prior to entry:

- Certified Master Application – currently Form A
- Certified Master Recommendation – currently Form B
- Certified Master Mentor Agreement – currently Form C
- Certified Master Development Plan – currently Form D

The following documentation is submitted by the mentor & managed by Wiley during the program duration at a minimum of every 6 months:

- Certified-Master-in-Training Progress Report – currently Form E

The following documentation is submitted by the mentor & managed by Wiley when the mentor feels Certified-Master-in-Training is ready for Certified Master designation and at least 90 after the most recent progress report submission:

- 2 Client Letters of Recommendation regarding Certified-Master-in-Training's credibility and interactions with specific reference to The Leadership Challenge and/or LPI work submitted to and approved by Primary Mentor
- Letter(s) of Recommendation from the Secondary Certified Master Mentor(s) with whom the Certified-Master-in-Training had significant interactions
- Certified Master Candidate Qualification –currently Form F
Submitted by Primary Mentor as the recommendation for Certified-Master-in-Training to be granted Certified Master designation

Verification of Candidate's Completion

Wiley based upon Primary Mentor recommendation, Letters of Recommendation by Secondary Mentor(s), and final review of all paperwork by Jim Kouzes or Barry Posner.

Certificate Issued

Certificate as a "Certified Master" formally awarded by Wiley/Authors at next annual celebration with signature of Primary Mentor.