

**Detailed Certification Process for Associates**  
**(Certification process for non-associates included in different manual)**  
**Version 10.26.2012**

**Open Courses**

Individuals interested in gaining certification in any phase or application of the Adizes Methodology should first attend a Phase 0 training. This training can be a BTP delivered by an office or an AAM/TopLeaF or other course that covers the Phase 0 material and is taught by an Adizes Management Development Leader qualified to deliver these courses and thus supply their students with certificates of attendance purchased from the Adizes Institute.

These Phase 0 courses are also available through the Adizes Graduate School – for questions on enrollment please contact the registrar or visit the website [www.adizesgraduateschool.org](http://www.adizesgraduateschool.org). This is the recommended path for those wishing to become Associates and advance to the higher levels of Phase training.

Taking the Phase 0 exams: if you attend any of the three Phase 0 courses at the Adizes Graduate School, the exam is at the end of the course and no further action is required.

If you take a Phase 0 course OUTSIDE of the Adizes Graduate School, you will be asked to take the relevant online multiple choice exams, which can be purchased in the online store [www.adizes.com/store](http://www.adizes.com/store)

Individuals who pass the online exams can then take additional courses to become TopLeaF Moderators, or attend the course Leading Highly Effective Teams – Adizes Integrators Training (known internally as “E2” or enhanced Phase 2).

The course Leading Highly Effective Teams – Adizes Integrators Training requires proof of passing two of the three Phase 0 exams, “Mastering Change” and “Roles & Styles.” Individuals who attend this course and pass the written exam (within 3 months of the course end date) receive a certificate of attendance. This certificate of attendance is as far as someone can go in this process without becoming an Associate.

**Becoming an Associate**

The Managing Director of an office must invite the individual in question to join their office and become an associate. The managing director of the office does this by filling out an associates application form and sending it to the Secretary of ACAPI. The Secretary of ACAPI, after making sure it has been filled out in totality, with all of the relevant documentation, will pass it on to the Professional Director of the Adizes Institute. The Professional Director of the Institute will review the application, do whatever due diligence he/she feels is necessary and approve or deny the application. The approval or denial is given to the Secretary of ACAPI who sends the relevant letter to the Managing Director of the office that first submitted this individual for acceptance as an Associate.

It is important to note that potential associates will be evaluated using the following criteria:

1. High energy level,
2. Values compatible with those of the Adizes Institute,
3. Business experience,
4. Integrity,
5. Intellectually curious,
6. Ability to think on their feet,
7. Ability to contain positive and negative feelings of customers,
8. Able to deal with high levels conflict,
9. Emotionally stable,
10. Able to lecture,
11. Has presence,
12. Speaks English at a satisfactory level,
13. Has a BA or higher.

Once the managing director of the office receives a letter of approval from the professional director through the secretary of ACAPI they should have the approved individual sign an Associate's Agreement. That agreement should be copied and the original should be sent to the Adizes Institute Legal department for storage. A copy should also be stored at the office. (Copy [paula@adizes.com](mailto:paula@adizes.com) for legal, and [demelza@adizes.com](mailto:demelza@adizes.com) Secretary of ACAPI)

Once the Associate's agreement is signed that individual is an Interning Associate at the Adizes Institute; they are NOT a Certified Associate, NOT an Associate, NOT a consultant, but an Interning Associate. Note that no one can work for an office without an employment agreement or Associate's Agreement that is filed with the Adizes Institute in Santa Barbara (Headquarters).

Once the Associate's Agreement is received and filed the Associate in question will receive a welcome letter from the Secretary of ACAPI which will include information on how to attend the Associate Orientation, and how to apply to the Adizes Graduate School. (Please note that further Adizes education is required to progress through the higher phases of the Methodology to become certified and that the required courses are offered only by the Adizes Graduate School).

The associate will also be provided with an adizes.com email address and be added to the network directory and the weekly reporting list.

The Associate may begin to prepare to attend Phase training if he/she is accepted into AGS (contact the registrar for details). Their managing director should begin this preparation by having the Associate observe Syndags and POCs and perform Synerteam integration under supervision. Depending on the needs of the office, the associate may be asked to specialize in Synerteam integration for some time, or they may be rushed into phase trainings.

Before the Associate attends courses at AGS the Managing Director should make sure that the Corporate Agreement between their office and AGS is up to date. This is so that the appropriate discount may be given on tuition (50%). If the corporate agreement is not up to date then the office will be held responsible for paying AGS the full, non-discounted tuition for the student.

For questions on enrollment in AGS, contact the registrar. The enrollment schedule is available on the web internal calendar and it is the student's responsibility to make sure he/she has submitted the appropriate documents by the due date.

While there are many AGS courses associates must take in order to advance as associates, for this manual we will just focus on courses on the advanced phases which lead to certification.

Thus after completing the E2 course (receiving their certification or not) the next course is phase I/III. There are many prerequisites for this course, but the most significant is having passed all three phase 0 exams, having observed at least one Syndag and having reviewed the phase III online training course. The phase I/III is a 3.5 day course that takes place in person. It concludes with an oral exam that must be taken within 3 months after the course end date, by VIDEO conference.

The student will be notified that they should schedule their exam.

After the exam they will receive their grade and any comments from the AGS registrar. Students are encouraged to review their exam grades with their office Professional Director to evaluate potential areas of improvement and to prepare for their internships.

Once a phase training exam has been passed the Secretary of ACAPI will record the grade in the master log and send out a letter of appointment to that student's tutor, copying the student. For phases 1, 4, 5,6,8,9 and 11 specific tutors will need to be assigned by the professional director of the Adizes Institute. For phases 2, 3, 7 and 10 the tutor is de facto the professional director of their home office.

For phases 1, 4, 5,6,8,9 and 11 the internship must be monitored in person. The student should have observed the phase being delivered once before attending the training. After the training they should assist a certified associate in delivering the phase and only then should they attempt to deliver the phase on their own, under the supervision of their tutor. Typically the student does not get paid for their internship but the tutor does.

Before a convention or colloquia, where associates can "sit for certification" (i.e. get certified), the tutor should request and fill the tutor recommendation form, available from the Secretary of ACAPI. The Secretary of ACAPI will then contact the person and notify them of paperwork required for their certification file. This

information also typically goes out in email at least two months before a convention as a reminder.

Once certified in a given phase or phases, the Associate takes an oath and is recognized on our Professionals' webpage (contact Network Coordinator for instructions on how to upload your photo and bio).

Have questions?

Contact your office Managing Director

Or...

Details of Phase training program content/methodology: [shoham@adizes.com](mailto:shoham@adizes.com)

Secretary of ACAPI: [demelza@adizes.com](mailto:demelza@adizes.com)

Registrar of AGS: [demelza@adizes.com](mailto:demelza@adizes.com)

Legal – Associate's Agreements – Employment Agreements: [paula@adizes.com](mailto:paula@adizes.com)

Online store (purchasing Phase 0 exams): [jake@adizes.com](mailto:jake@adizes.com)