

CERTIFIED DIGITAL CONSULTANT (CDC)

Certification Manual

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Chamber of Commerce and Industry Serbia (PKS)

Center for Digital Transformation (CDT)

Belgrade

<http://www.pks.rs/digitalizacija>

MANUAL

CERTIFIED DIGITAL CONSULTANT (CDC)

THIS PERSONAL CERTIFICATION, DEVELOPED IN ACCORDANCE WITH ISO 17024, IS COMPLIANT WITH INTERNATIONALLY APPLICABLE STANDARDS AND ENJOYS RECOGNITION WORLDWIDE.

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1 PKS CDT Pilot Project 2018

1.1 Background

Serbia traditionally has a strong industrial (mechanical engineering, automotive, metal processing, manufacturing, textile etc.) and agricultural base with strong integration in international value chains. In the last 12+ years the dynamically growing ICT industry (especially the IT sector) provides an increasingly important element to the development of the Serbian economy as such. As an offspring of the IT sector development new tech/IT start-ups are adding to this dynamic and vibrant development.

Global trends such as digital transformation of business models, digitisation of value chains and manufacturing specific elements like Industry 4.0 increasingly have their impact on all industries and sectors in Serbia. The degree of digitisation of business processes within industries, between players of (horizontal) value chains and within single companies (vertical value chains) will increase enormously in the coming few years.

Companies cannot *avoid* digital transformation any longer. Most companies have realized that by now. Those who want to remain competitive also in the future must actively face digital transformation challenges.

The primary needs of SMEs in the process of digital transformation are the provision of a supportive business climate and legal framework in combination with the provision of practical knowledge and advice how to initiate and successfully implement digital solutions in companies of all sizes (MSMEs) and governance structures of all kind. The initiation and integration of Serbian research resources and results are complementary to creating a supportive business environment for Serbian companies.

1.2 CDT Approach

The Chambers of Commerce and Industry Serbia (PKS) together with other private and public sector bodies and organizations recognizes these global trends, their impacts on the local economic development and the specific role of the IT sector as a cross-cutting key technology and act accordingly.

In response to the challenges of the global trend of digital transformation, PKS has decided to establish the Center for Digital Transformation d.o.o. (CDT). This Center for Digital Transformation will enable PKS to respond in an efficient and transparent way to all the challenges of digital transformation through the provision of

- Knowledge, Education & Technical Information
- Consulting & Implementation Support
- EU & National Funding Support

and the creation of strategic partnerships with technology carriers on the one hand and companies that use these solutions in their business on the other.



The project for the establishment and development of the Center for Digital Transformation is supported by the GIZ - the German Organization for International Cooperation, as well as the Austrian Chambers of Commerce - WKO.

1.3 Pilot Phase 2018

Consulting services can help in implementing these digital transformation changes and adding new value at the same time. Hence, there is an ever-growing demand for IT service providers and management consultants specialized in digital transformation. **As an IT service provider and management consultant, you are THE sparring partner of your clients in the digital revolution.**

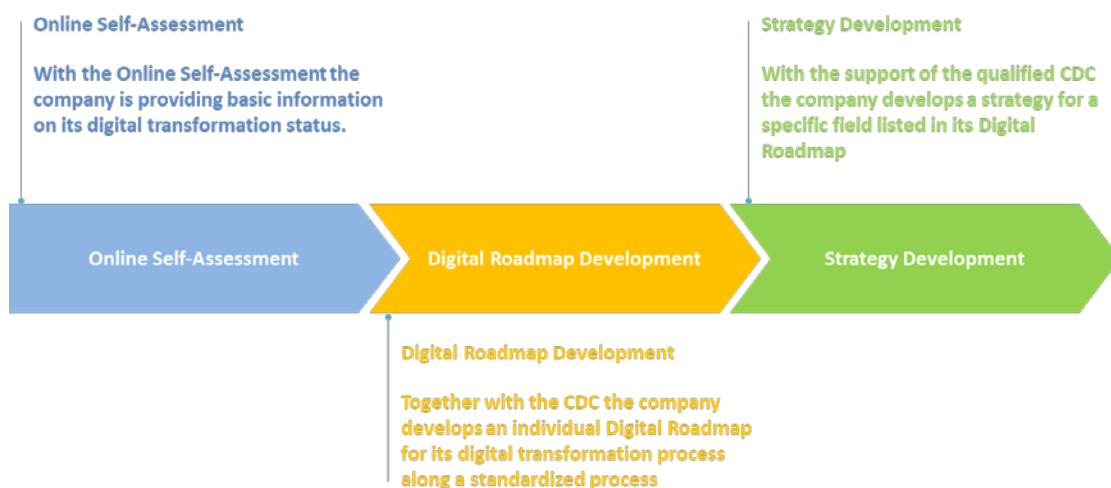
Your clients need specific and state-of-the art qualifications for their decisions. With the certificate **Certified Digital Consultant** and with your previous professional experience in the field of digital transformation you will have a presentable quality seal, you will create trust among your clients and have proof that you are capable of advising and monitoring companies and organizations professionally in their digital transformation processes in a way that will lead them to success.

Therefore, the PKS CDT offers a limited number of consultants to be trained and certified as *Certified Digital Consultant*¹ during the *Pilot Project 2018* (→ for details see information given in Chapter 2 and 3).

After their certification these new CDCs will work with Serbian SMEs from different industries and sectors (e.g. agriculture, automotive, logistics, machinery building, tourism etc.) on drafting individual Digital Roadmaps for each company and implementation strategies for selected fields identified in Digital Roadmap. The objective is to have at least 40 SMEs having a Digital Roadmap by the end of 2018.

¹ Based on the WKO *KMU Digital* model

The SME digital transformation consulting is based on three elements:



All successfully certified CDCs will acquire the necessary knowledge and tools for the implementation of their consulting assignments during the training and certification process.

After the evaluation of the PKS CDT Pilot Project 2018 results an upscaled rollout of the *CDC and SME Digital Transformation Programme* is planned for 2019 onwards. All CDCs are invited to work with Serbian SMEs under the framework of this programme.

2 Overview Certification Process

2.1 Validity and Meaning of the CDC Certification

Certified Digital Consultant is a certificate awarded by the institute authorized to issue certificates to IT service providers and management consultants with the relevant experience, knowledge and skills in the field of digital transformation.

The CDC certification during the runtime of the *PKS Center for Digital Transformation (PKS CDT) Pilot Project 2018* is granted with the support *incite*², the quality academy of the Professional Association for Management Consulting, Bookkeeping and Information Technology (UBIT). *incite*, accredited in accordance with ISO/IEC 17024³, stands for objective process flow, examination and decision-making and points out explicitly that this certification is only awarded to natural persons, not to companies/institutions or products. Companies/institutions can however let their employees, provided that they fulfil the requirements, get the certificate.

The certification is intended for IT service providers and management consultants

- who are active in the field of digital transformation and can provide proof thereof and
- want to document their special knowledge in the field of digital transformation with a strong quality seal.

2.2 The Know-How of Certified Digital Consultants

The certified persons

- possess extensive knowledge about digital trends as well as about chances and risks associated with digital transformation,
- are able to recognize digital potentials of their clients,
- can determine the degree of maturity in a company's digital transformation process,
- can develop and monitor digital transformation strategies,
- recognize chances and can monitor the technical implementation and development of products, services and business models,
- possess their "personal tool box" & soft skills,
- are able to put to use innovations and novelties in all areas of the value-added chain for their clients.

2.3 Benefits of the Certificate

- Documenting the "state-of-the-art" of your competences in the relevant subject areas
- External representation of quality and a stronger position on the market

² <https://www.incite.at/ausbildung/>

³ "ISO/IEC 17024: Conformity assessment - General requirements for bodies operating certification of persons" is an International Standard which specifies criteria for the operation of a Personnel Certification Body (also known as a certification body for persons). The standard includes requirements for the development and maintenance of the certification scheme for persons upon which the certification is based.

- Generating more work for you with more successful client acquisition as the PKS CDT Pilot Project for 40 Serbian companies is planned to turn into a regular support service for Serbian companies from 2019 onwards.

2.4 Selection, Training and Certification Procedure

The certification is done in a three-step procedure:

- Step 1 Examination of the formal eligibility criteria and selection of candidates to be trained and certified,
- Step 2: Participation in Preparatory Trainings of all selected consultants,
- Step 3: Certification Commission Hearing.



Following a positive conclusion of the procedure, the candidate will be granted the certificate *Certified Digital Consultant* (CDC) as well as the right to bear this certificate as a person until its expiry and recertification.

2.4.1 Step 1: Examination of the formal eligibility criteria

All documents for the certification must be submitted in writing (for details see [Chapter 3: Eligibility Criteria](#)) The evidence to be provided includes relevant documentation from the last three years. Please use the forms (→ see separate templates for Application Form and Certificate of Good Conduct).

Note: Please send the completed application form in English (references and certificates can be in Serbian) together with all supporting documents exclusively by electronic means

- to the PKS CDT office via digitalnikonsultanti@pks.rs
- until Monday, June 4th 2018, 14.00h (CEST)

You will receive a confirmation of receipt by mail.

Complete application documents are reviewed by an expert panel composed of PKS CDT, GIZ, WKO and external experts.

2.4.2 Step 2: Participation Preparatory Trainings

Following the successful review by the expert panel, selected candidates will be invited to the Preparatory Training sessions on 22nd- 25th of June 2018 (for details see [Chapter 3.6](#)) by Tuesday, June 12th 2018.

After the full participation in the Preparatory Trainings, PKS CDT will invite the candidate to the Certification Commission Hearing.

2.4.3 Step 3: Certification Commission Hearing

In order to ensure that the certificate is awarded only to highly qualified and experienced candidates, apart from fulfilling the formal eligibility criteria and their full participation in the Preparatory Trainings, the candidates must present their experience in a Certification Commission Hearing.

Certification Commission Hearing procedure:

- The Certification Commission Hearing includes the examination of the working methods of the candidate by a commission.
- The qualification procedure lasts max. 45 minutes per candidate.
- The commission will dedicate itself to one person in a Certification Commission Hearing ("individual examination").
- In the Certification Commission Hearing, the candidate shall present his/her knowledge and working method.

Details about the Certification Commission Hearing are explained in more detail in [Chapter 3.7](#) of the eligibility criteria.

The Certification Commission Hearing will be held only if **PKS CDT** has positively assessed the submitted documents for the certification. Details concerning the documents that must be previously submitted are explained in the eligibility criteria.

2.5 Timeline PKS CDT Pilot Project 2018

Date	Topic
15.05.2018	Publication Open Call Consultants
04.06.2018	Application Deadline
12.06.2018	Information on Selected Candidates
22./23.06.2018	Preparatory Training Basic Module - Development of Digital Roadmaps
24./25.06.2018	Preparatory Training Focus Module A: - Digital Transformation (Business Models & Processes) Preparatory Training Focus Module B: E-Commerce/E-Marketing & Social Media
July 2018 (tbc)	Certification Commission Hearings
From Sept-Nov 2018	Implementation Digital Roadmap and Strategy Consulting
Dec 2018	Evaluation Pilot Project 2018

2.6 Costs

During the *PKS CDT Pilot Project 2018* the training and certification costs for the selected consultants is covered by the organizers, i.e. cost-free for the selected consultants.

2.7 Revocation of Certificate

A violation against the conditions for certificate holders—leads to the immediate revocation of the certificate.

2.8 Period of Validity

The certificate shall be valid for a period of three years. An annual identification fee of EUR 70.00 plus 20% VAT will be charged.

PKS CDT states here explicitly that the certificate can be awarded only to natural persons and not to companies, also expressly not to products.

2.9 Questions and Contact

If you have any questions, do not hesitate to contact us.

Your contact partner: Filip Mrdak, digitalnikonsultanti@pks.rs

3 Eligibility Criteria

Overview

1. Letter of Motivation
2. Curriculum Vitae
3. Proof of Professional Experience and Letters of Reference
4. Education and Training
5. Certificate of Good Conduct
6. Participation Preparatory Trainings
7. Certification Commission Hearing
8. Fluency in English

You will find detailed information on each criterion below.

Note: PKS CDT and *incite* guarantee data protection and confidentiality in respect to all documents submitted in relation to the certification.

3.1 Letter of motivation

The letter of motivation with a length of one to maximum two A4 pages shall include statements about the following:

- About you and what motivated you to apply for the certificate Certified Digital Consultant.
- What qualifications, knowledge, experience and core competences do you have that fit into the certification profile?

3.2 Curriculum Vitae

The CV serves on one side to assess the education, training and previous professional experience of the candidate, and on the other side as a basis for the commission for the certification commission hearing.

As proof, a comprehensive CV must be submitted, which must include the following:

- Current personal status
- Education and training
- Work experience

It is recommended to use the Europass CV template.

→ <https://europass.cedefop.europa.eu/documents/curriculum-vitae>

3.3 Proof of Professional Experience and Letters of Reference

The candidate must be active as an IT service provider and/or management consultant (either self-employed or as an employee of an appropriate company or educational institution) and prove that he/she **has worked for a minimum of three years as an**

- **internal consultant,**
- **responsible internal project leader,**
- **or external consultant**

in the field of digital transformation.

Digital transformation in the context of the PKS CDT Pilot Project is consciously defined broadly as any change associated with the application of information and digital technologies in all aspects of the establishment and/or operation of (start-up) companies, public sector bodies, associations and human society as such.

Proof must be submitted by listing **at least three projects** from the last three years **from different areas** of digital transformation.

If the candidates have worked over the past three years e.g. only on one large-scale project, then, as an alternative, they can present individual project phases.

The projects should be presented in a comprehensible manner by outlining the following points:

- Initial situation
- Objective(s)
- Concept
- Implementation
- Critical factors/challenges
- Success factors
- Result/ benefits for clients

These three **projects must be accompanied by references** from clients or employers. If the candidates have worked over the past three years only on e.g. one large-scale project, alternatively, they can submit corresponding letters of reference for individual project phases. Preference will be given to candidates with broader references.

The candidate is required to present one of the submitted projects in the latter certification commission hearing.

3.4 Education and Training

Proof must be submitted of education and continuous training with a focus on the areas of knowledge mentioned below. Substantial professional experience can replace formal education.

In addition, please enclose an explanatory self-presentation with detailed information related to the attendance of workshops, specialist lectures, trainings, congresses, conferences or self-studies (e.g. books, websites, learning material), if this is not already presented in a conclusive and comprehensive manner in your CV. **Concrete proof** must include certificates of attendance, leaving certificates etc.

Proof **must be submitted** for the following topics:

- Digital megatrends, tools, trend maps
- analysis of digital potentials of companies or organizations
- digital transformation topics and its impact
- Technical aspects of digital transformation (Big Data, AR/VR, IT security etc.)
- Innovation techniques (open innovation etc.)
- Start-up and entrepreneurship methodologies
- Methodological know-how
- etc.

PKS CDT, GIZ and WKO reserve the right to recognize the education and training for the aforementioned areas.

3.5 Certificate of Good Conduct

A certificate cannot be granted, i.e. an already granted certificate must be suspended in case that the candidate has been finally convicted for economic offences or is involved in ongoing bankruptcy or liquidation proceedings. The possible suspension of a certificate does not extend the validity period of the certificate. Proof is provided with a confirmation of good conduct issued by the candidate himself/herself with a legally binding signature of the candidate.

Please use the separate form for that purpose.

3.6 Participation Preparatory Trainings

The Preparatory Trainings are providing the candidates with the necessary knowledge and process know-how necessary to successfully consult companies during the PKS CDT Pilot Project 2018 and beyond.

3.6.1 Preparatory Training Modules

The Preparatory Training sessions consist of three modules

1. Basic Module: Development of Digital Roadmaps
2. Focus Module A: Digital Transformation (Business Models & Processes)
3. Focus Module B: E-Commerce/E-Marketing & Social Media

All Preparatory Training Modules are based (and where necessary adjusted to Serbian needs) on the WKO KMU Digital training modules.

Each candidate has to choose one Focus Module (A or B) in the Application Form.

3.6.2 Preparatory Training Content

The Preparatory Training Modules comprise the following content (→ content can be modified according to needs and pre-knowledge of trainees)

1. Basic Module: Development of Digital Roadmaps

- *How do I Develop a Digital Roadmap?*

- Introduction to the PKS CDT Pilot Project 2018
- Digital Trend Map, Digital Megatrends and their impact on society
- Digital Roadmap: introduction to process and application of the tools
- Maturity assessment, opportunity and threat trends
- Report requirement, electronic documentation of the potential analysis
- Input Certification Certified Digital Consultant
- Information on Specific Module A/B: “Digital transformation” and “e-Commerce, e-Marketing & Social Media”
- Role of the consultant in the process

2. Specific Module A: Digital Transformation (Business Models & Processes)

- *How Can I Accompany My Customers in the Digitization Process?*
 - Disruption, digitization, Industry 4.0, transformation and digital business models
 - Digital Business Models in Business 4.0
 - Transformation & Digital Leadership - cultural aspects in digital transformation
 - Value chain and Management – Digital transformation across divisions and companies
 - Industry 4.0 and mobile data management
 - Digital Marketing - Meet the customer digitally
 - IT security for consultants

3. Specific Module B: e-Commerce, e-Marketing & Social Media

- *How Can I Accompany My Customers to analyse customers behaviour & needs and to digitalize customer contact points?*
 - Trends in eBusiness
 - Sales & Digital Transformation: From the funnel model to the customer journey
 - Commerce: from own shop to platform
 - Big Data: From data to information
 - Online Marketing: From SEO to Social Media

3.6.3 Preparatory Training Session Dates

The Basic Module training sessions are held on 22nd/23rd of June 2018.

The Specific Module A and B sessions are held in parallel on 24th/25th of June 2018

Please note that these dates contain weekend dates.

All selected candidates have to attend (→ mandatory requirement) the Basic Module (two days) and one Specific Module (two days). Only candidates that attended all Preparatory Training sessions can be certified.

The courses will be held in English and will not be translated; training materials are in English.

3.7 Certification Commission Hearing

One of the projects presented in the professional experience must be prepared and presented in detail in the Certification Commission Hearing.

Please choose a project that will show both your **methodical consulting** competence as well as your digital transformation **expertise**.

3.7.1 Structure of the Certification Commission Hearing in detail

The Certification Commission Hearing has the following structure:

- Personal introduction of the candidate incl. short description of the work experience as well as presentation of his/her motivation (max. 5 minutes)
- Presentation of a project carried out independently from the field of digital transformation with a depiction of the entire process (duration: max. 20 minutes)
- Questions about the content and type of the presented case study and about the corresponding professional competence
- Testing the knowledge about priority topics
 - ✓ Objectives and contents of the PKS CDT Pilot Project 2018
 - ✓ Digital megatrends, tools, trend maps
 - ✓ Analysis of digital potentials
 - ✓ Digital transformation and its impact
 - ✓ Technical aspects of digital transformation (Big Data, AR/VR, IT security etc.)
 - ✓ Methodological know-how
- Open questions/discussion
- Assessment at the end of the Certification Commission Hearing after the commission's internal consultation

3.7.2 Certification Commission

The commission is formed by PKS CDT, GIZ and WKO in cooperation with *incite* as the responsible certification body as follows:

- Expert representatives of the PKS CDT, GIZ and WKO with experience in the field of digital transformation
- Representatives of Serbian private sector or academia with relevant experience
- Representatives of *incite* with relevant certification

The commission consists of three persons, with one of them acting as chairperson.

One representative of the commission shall possess detailed knowledge about the *incite* organization and ISO 17024 certification and will thus represent the certification body.

3.7.3 Certification Commission Hearing Dates

Depending on the number of selected candidates participating in all Preparatory Training days two or three Certification Commission Hearing dates will be presumably scheduled for July. The exact dates are not yet scheduled due to expert availability but will be announced as soon as possible.

3.7.4 Recommendations for the Technical Preparation

- Please send your presentation at the latest three work days before your Certification Commission Hearing to PKS CDT (digitalnikonsultanti@pks.rs) and bring your backup copy on a flash drive directly to your Certification Commission Hearing (laptop, projector and internet access will be made available).
- Please bring also three hardcopy handouts (for the commission) to your Certification Commission Hearing.

3.7.5 Assessment

The candidate is assessed as follows: "Certification Commission Hearing passed" or "Certification Commission Hearing not passed". An appeal against the decision of the commission is not admissible.

At the end of the Certification Commission Hearing the commission will assess the candidate based on an assessment sheet.

- Presentation of motivation
- Presentation of expertise and of the conducted project (theory and practice)
- Presentation and quality of the project presentation

The chairperson of the commission will present a summary of the assessment results and minutes will be recorded. After that the candidate will be informed of the result of the certification commission hearing.

The final granting of the certificate is done after a positive assessment of the three certification stages by the head of the certification body.

3.8 Fluency in English

All candidates are expected to be fluent in English (active and passive). All Preparatory Trainings and the Certification Commission Hearing are held in English.

4 Abbreviations

CDC	Certified Digital Consultant
CDT	(PKS) Center for Digital Transformation Centar za digitalnu transformaciju d.o.o.
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
PKS	Privredna komora Srbije Chamber of Commerce and Industry of Serbia
SME	Small and Medium-Sized Enterprises
WKO	Wirtschaftskammer Österreich

Table 1 Abbreviations

5 Annexes

5.1 CDC Application Form

CDC APPLICATION FORM

Please fill in all data in legible capital letters.

Addressed to:

PKS CDT

digitalnikonsultanti@pks.rs.

Herewith I herewith bindingly apply for the

- **Certification as Certified Digital Consultant**

and declare that

- I have read and fully accept the requirements and conditions as laid down in the PKS CDT Pilot Project 2018 “CDC Manual” and the data protection provisions contained therein, as well as the conditions for the certificate holders. They can be found on the PKS website at <http://www.pks.rs/digitalizacija>;
- in case I apply as an employee of a company, I have the permission/right to work as a consultant / freelancer and I can and will offer the needed amount of time, but at least 3 days, until the end of the PKS CDT Pilot Project (presumably until end of 2018);
- I would like to attend (→ select one)
 - Focus Module A: Digital Transformation (Business Models & Processes): yes / no
 - Focus Module B: E-Commerce/E-Marketing & Social Media: yes / no;
- I have understood that only full participation in the Basic Module and one of the Focus Modules entitles me to undergo the Certification Commission Hearing;
- I agree to pay EUR 200.- to Centar za digitalnu transformaciju d.o.o. in case

- ☐ I either fully participate in the Basic and one Focus Training Module, but don't participate in one Certification Commission Hearing (→ compensation for training costs) or
- ☐ I refuse to do at least one Digital Roadmap with a company applying for the PKS CDT Pilot Project 2018 (→ non-performance and compensation for training and certification costs).

Applicant Data

Applicant: _____

Company: _____

Street: _____

PO Box, City: _____

Tel/Mobile: _____

e-mail: _____

Date of birth: _____

Attached to the CDC Application Form I send the following documents for the Eligibility Criteria:

1. Letter of Motivation
2. Curriculum Vitae
3. Proof of Professional Experience and Letters of Reference
4. Education and Training
5. Certificate of Good Conduct

Place, Date:

Legally binding signature

5.2 Certificate of Good Conduct

CERTIFICATE OF GOOD CONDUCT

Herewith I confirm that I have not been convicted for economic offenses and I am not involved in some bankruptcy or liquidation proceedings.

If one of the two above mentioned cases should arise after the granting of the certificate I shall inform PKS CDT immediately thereof, upon which PKS CDT will suspend the certificate until such financial matters are settled.

Name: _____

Address: _____

Place, Date:

Legally binding signature