



Instructions for becoming a Certified Vested Coach



What do I do as a Certified Vested Coach?



The Certified Coach (CDA Coach) designation is a prestigious recognition of CDAs who possess exceptional expertise and knowledge of both the theory and practice of the Vested methodology and relational contracting practices.

- Certified Coaches are individuals who have led at least two Vested deals and have a wide understanding of Vested in practice and can evaluate how well a Deal Architect team is architecting their agreement
- Certified Coaches typically are professional deal makers who work on multiple deals in their career



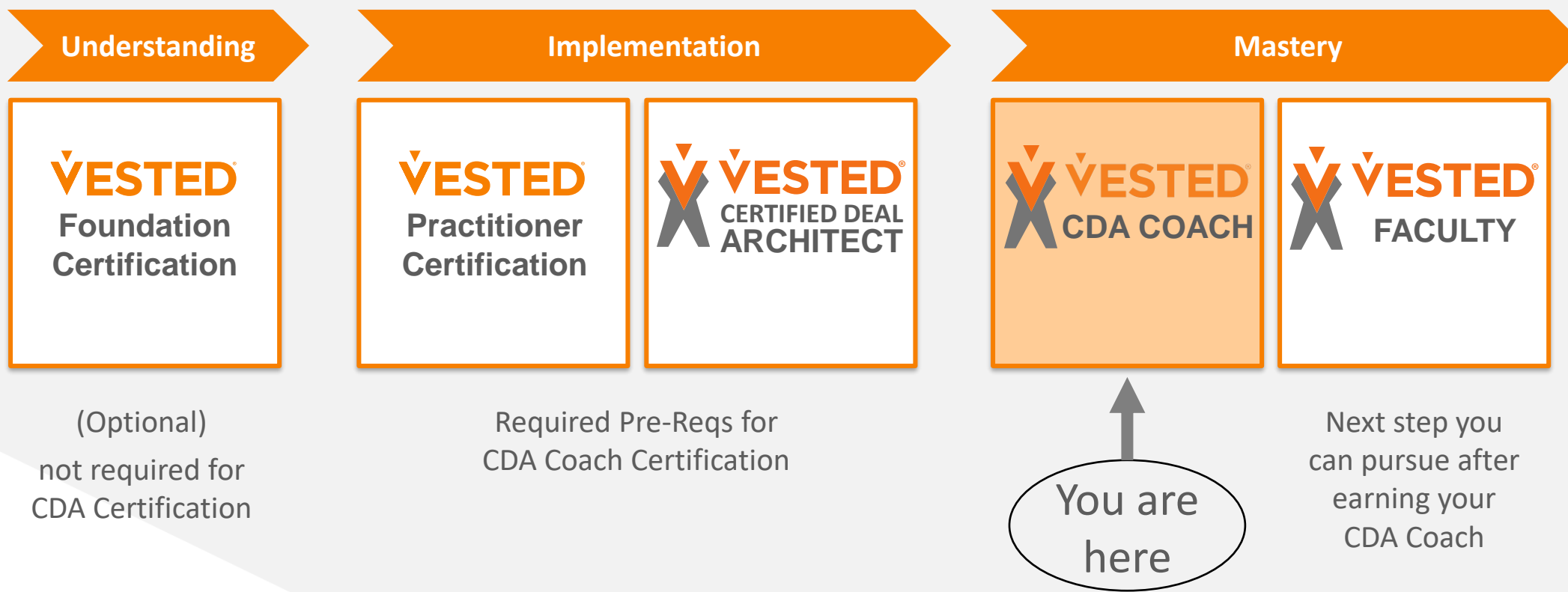


Where is CDA Coach in the Vested Certification levels?



The CDA Coach Certification is the 4th of five Vested Certification levels

In order to become a CDA Coach, you must have previously earned your Practitioner Certification and your Certified Deal Architect (CDA) Certification.





CDA Coach Certification: Courses You Must Have Taken



Individuals wanting to become a Certified Coach must complete *all* of the Vested courses and lead their organizations through the successful completion of a Vested Agreement, including being enrolled in the CDA Coaching Program course



All orange highlighted courses above: required for CDA Certification



CDA Coach Certification: Requirements



1. *Complete three Topics in the 501 Course and pass the Quizzes*
2. *Complete three Topics in the 502 Course, and pass the listed Quizzes*

There are *six* specific elements you must complete to become a Certified Coach



1. **Standing Neutral**

(Course and Quiz taken in 501 Continuing Education course)



2. **Request for Partner**

(Course and Quiz taken in 501 Continuing Education course)



3. **Relationship Health Monitoring**

(Course and Quiz taken in 501 Continuing Education course)



4. **Delivering a CaT Assessment**

(Course and Quiz taken in 502 CDA Coach Program course)



5. **Deal Review**

(Course and Quiz taken in 502 CDA Coach Program course)



6. **Soft Skills Assessment**

(taken in 502 CDA Coach Program course)



CDA Coach Certification: Note on Requirements



These six requirements are *in addition* to the requirements for becoming a Certified Deal Architect, as you must be a current CDA to become a CDA Coach

You also must have also completed **two** Vested Deals, including at least **one** *Certified* Vested Deal

Please complete the three required elements in the 501 Course, and the three required elements in the 502 Course. All of your courses can be found in your Vested “My Account” page

If you are having trouble accessing a course or cannot access a course at all, please email Mike Watts at mwatts10@utk.edu for assistance

- | | |
|---|--|
| ✓ | 1. Standing Neutral
(Course and Quiz taken in 501 Continuing Education course) |
| ✓ | 2. Request for Partner
(Course and Quiz taken in 501 Continuing Education course) |
| ✓ | 3. Relationship Health Monitoring
(Course and Quiz taken in 501 Continuing Education course) |
| ✓ | 4. Delivering a CaT Assessment
(Course and Quiz taken in 502 CDA Coach Program course) |
| ✓ | 5. Deal Review
(Course and Quiz taken in 502 CDA Coach Program course) |
| ✓ | 6. Soft Skills Assessment
(taken in 502 CDA Coach Program course) |



CDA Coach Certification: Quiz Requirements



1. Standing Neutral Quiz

(taken in *501a Standing Neutral* course)



2. Request for Partner Quiz

(taken in *501b Request for Partner* course)



3. Relationship Health Monitoring Quiz

(taken in *501 Relationship Health Monitoring* course)



4. Delivering a CaT Assessment Quiz

(taken in *502a Delivering a CaT Assessment* course)



5. Deal Review Quiz

(taken in *502b Conducting a Deal Review* course)

Description

Avg. Time to Complete

20 questions

20-25 minutes

20 questions

20-25 minutes

10 questions

10-15 minutes

15 questions

15-20 minutes

20 questions

20-25 minutes



CDA Coach Certification: Submission Requirements

- In addition to the Quizzes, you must submit Deliverables for the CaT Workshop and the Deal Review Workshop, as well as your Soft Skills Assessment



4. **CaT Workshop Presentation**
(submitted in *502a Delivering a CaT Assessment*)



5. **Deal Review Presentation**
(submitted in *502b Conducting a Deal Review*)



6. **Soft Skills Assessment**
(submitted in *502c Soft Skills Assessment*)

Description

Avg. Time to Complete

CaT Workshop Presentation

2-4 hours

Deal Review Presentation

2-4 hours

Self-assessment

2-4 hours



CDA Coach Certification: Course Requirements

- Take each required Topic and course
- As you complete each Topic, return to the Topic Screen
- You must click the **Mark Complete** button to assure you receive credit for completing each Topic

Part 1: 10 Minute Overview of the Standing Neutral

JUNE 8, 2021 BY MIKE LEDYARD

501b – Standing Neutral > Standing Neutral > Part 1: 10 Minute Overview of the Standing Neutral

IN PROGRESS

MODULE PROGRESS

80% COMPLETE

Topic

Materials



Tools for Success



Decisions	Deliverable	Tool
Have you defined your process to appoint and make use of the Standing Neutral?	<ul style="list-style-type: none">• Standing Neutral selection process• Use of Standing Neutral in Issue Resolution process and Governance	Standing Neutral Worksheet



Access the Unpacking Standing Neutral white paper and the Worksheet in the Materials Tab



The resource for this Topic is a PowerPoint Presentation (there is no video).

Scroll through the slides above for an overview. You can also download this PowerPoint in the materials tab above.

Mark Complete ✓

Next Topic >

Back to Module



CDA Coach Certification: Are you ready?

Learn More About Vested Certified Coach Certification

SEPTEMBER 8, 2021 BY KATE VITASEK

0% COMPLETE 6/5 Steps

An ongoing continuing education program that brings both on-demand and in-person learning opportunities to CDAs, and is designed to give all CDAs the ability to stay current. Ready to get started on your journey to be a CDA Coach? Click below to begin.



Instructions for becoming a Certified Vested Coach



Click through the slides above for instructions for becoming a Certified Vested Coach. This is the next step for current Certified Deal Architects (CDAs). There are several pre-requisites before you can take this certification, so please read through the above thoroughly to learn about the requirements.

Course Content

About the CDA Coach Program

☐ One-Page Overview of CDA Coach Certification

☐ Coaching Program FAQ

☐ About Each Course in Certified Coach Certification

☐ Instructions for Becoming a Certified Coach

Final Step: Print Your Certificate

☐ Final Step: Print Your CDA Coach Certificate

- To check if you have completed all of the requirements and courses, go to **Learn More About Vested Coach Certification** and click **Open Course**

Learn More About Vested Certified Coach Certification

Open Course

- On that screen, click on **Final Step: Print Your CDA Coach Certificate**

- On the next screen, click on **click here**

Final Step: Print Your CDA Coach Certificate

SEPTEMBER 8, 2021 BY JENNIFER WERNER

Learn More About Vested Certified Coach Certification > Final Step: Print Your CDA Coach Certificate

IN PROGRESS

Once you have completed the courses required for this certification, please **click here** to print your certificate.

- On the next screen, click on **Final Step: Print Your Certificate**

Course Content

Expand All

☐ Final Step: Print Your Certificate

1 Quiz

CDA Coach Certification: Are you ready? (continued)




Final Step: CDA Coach Verification Checklist

JUNE 16, 2021 BY KATE VITASEK

Print Your Vested CDA Coach Certificate > Final Step: Print Your Certificate > Final Step: CDA Coach Verification Checklist

VESTED CDA COACH FINAL STEP

 You're on the final step to becoming a Certified Coach!

The final step is to complete the below **verification checklist**

NOTE: You will not be able to start the below verification checklist until you have completed all 6 of the CDA Coach requirements. If you haven't completed all of the requirements, it will list below which of the requirements you still need to complete.

Once the below verification checklist is completed, a button **PRINT YOUR CERTIFICATE** will appear

If the name on your certificate does not print correctly, please edit your name in your "My Account" and then retake this verification checklist

You will also be asked to enter your address after the verification checklist so the University of Tennessee can send you an official CDA Coach plaque

Congrats on becoming a Certified Coach!

You must first complete the following: Request for Partner Quiz, Conducting a Deal Review Quiz, Delivering a CaT Assessment Quiz, Relationship Health Monitoring Quiz, Upload Completed Deal Review Presentation - Initial Submission, Upload Soft Skills and Client Assessments

- On that screen, click on **Final Step: CDA Coach Verification Checklist**

Final Step: Print Your Certificate

JULY 1, 2021 BY KATE VITASEK

Print Your Vested CDA Coach Certificate > Final Step: Print Your Certificate

Module Content

- Final Step: CDA Coach Verification Checklist


- If you have not completed all of the requirements, you will see a list at the bottom of those items that must be completed
- If you have completed everything, you will see a list of Verification Questions (see next slide)

Final Step: CDA Coach Verification Checklist

JUNE 16, 2021 BY KATE VITASEK

Print Your Vested CDA Coach Certificate > Final Step: Print Your Certificate > Final Step: CDA Coach Verification Checklist

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Congrats on becoming a Certified Coach!

CDA Coach Verification Question

- ☐ I verify that I have taken and passed all five of the required quizzes for my CDA Coach Certification
- ☐ I verify that I have completed the required Soft Skills Assessment and reviewed/discussed it with a CDA Coach Mentor
- ☐ I verify that I am a current Vested Certified Deal Architect



Print Your CDA Coach Certificate



- Click each box to verify that you have completed all of the Requirements and click Next
- On the next screen, type in the way you want your name to appear on your CDA Coach plaque, your address and click Finish Quiz
- On the next screen, Print Your Certificate

CDA Coach Verification Question

☒ I verify that I have taken and passed all five of the required quizzes for my CDA Coach Certification

☒ I verify that I have completed the required Soft Skills Assessment and reviewed/discussed it with a CDA Coach Mentor

☒ I verify that I am a current Vested Certified Deal Architect

Next

Please input your preferred name to be printed on your CDA Coach plaque, and your mailing address for the University of Tennessee to send your plaque to.

CDA Coach Candidate
1234 Main Street
Wauseon, OH 43567

This response will be awarded full points automatically, but it can be reviewed and adjusted after submission.

Finish Quiz

RESULTS

2 of 2 Questions answered correctly

You have reached 3 of 3 point(s), (100%)

PRINT YOUR CERTIFICATE

Congrats on becoming a Certified Coach!

You can print your digital certificate using the button above, and you will also be mailed your CDA Coach plaque in the next few weeks. Congrats!

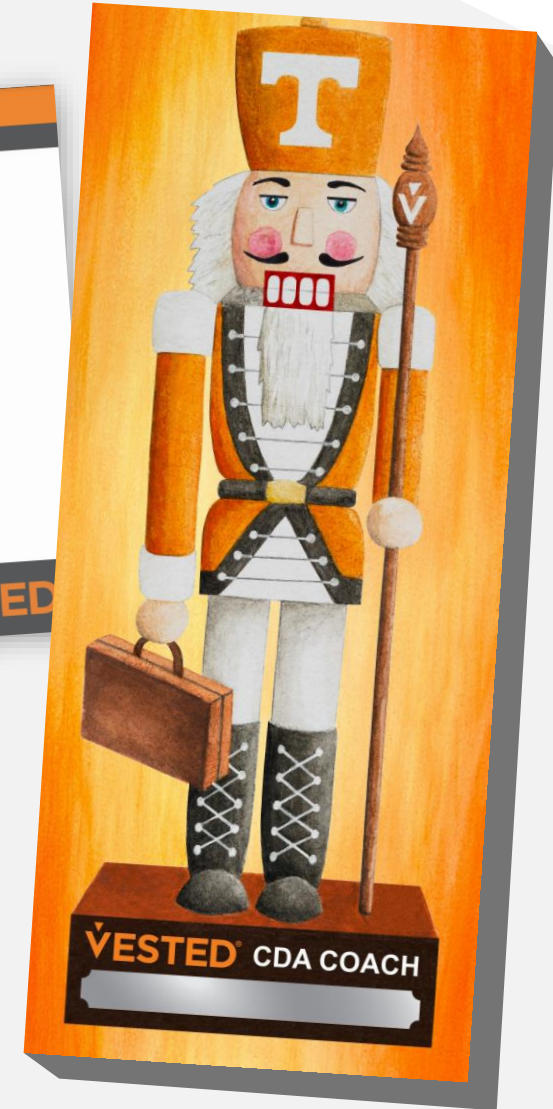


Receive your CDA Coach Certificate and Plaque



Once you are certified as a CDA Coach, in addition to your digital certificate you will also be mailed a plaque.

Congrats on becoming a Certified Coach!





Benefits You've Unlocked as a Certified Coach



Within the next few days, you will have full access to the CDA Coach Library, which contains resources for Certified Coaches.

You will also have access to all the Vested and CDA Coach logos and can use the CDA Coach logo in your email signature.

In addition, as a Certified Coach you can begin to commercialize your deals under a licensing agreement.

CDA Coach Library

APRIL 18, 2020 BY ELIZABETH KANNA

28% COMPLETE Last activity on September 7, 2021 9:04 am IN PROGRESS

Course Content

Expand All

- ☐ Vested Shared Vision & Desired Outcomes
3 Topics
- ☐ Relational Contracting vs. Vested
- ☒ FAQs
- ☒ The Vested Glossary

Awareness

- ☒ Vested Way eBr
- ☒ Vested 101 Pre





Ongoing Requirements of Certified Coaches



Like most certifications, the CDA Coaching Program requires a certain level of continuous education credits. Once someone becomes a Certified Coach they will need to continue to keep their skills up to date.

Ongoing Requirements

- The CDA Coaching Program uses a flexible “point” system to make it easy for Certified Coaches to stay involved and focus on things they think are most appropriate for them
- CDA Coaches must earn 10 total points of continuing education credit and/or equivalent leadership as a CDA Coach ***over a one-year period***
- This will be discussed in more detail in ***503 Staying Certified***



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