

## Certified Association Sales Executive (CASE) Course FAQ

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### Course Information

What is the CASE Course?

- The Certified Association Sales Executive (CASE) Course is an online, interactive, self-paced certificate course that fills your knowledge gaps of the association market and teaches you how to become an association mastermind.
- By discovering how to anticipate the needs of your clients, you will be perceived as a partner, not just a vendor, and build stronger and more dynamic relationships with your association clients. You will enhance your selling skills, learn new strategies, and become a member of an elite group of sales professionals.

How does the CASE course work?

- Upon ordering, we will send you the 2 required texts for the course: *Principles of Association Management* and *Professional Meeting Management*, 5<sup>th</sup> Edition.
- The ten module course is self-paced and allows you to complete the course work on your schedule. You have access to the materials for up to 12 months from the date of registration.
- Each of the first 9 modules features a self-assessment quiz to test your knowledge and ensure you have retained the course material.
- Modules 2-10 lead you through the steps to build an effective Account Plan for a client of your choosing; through research exercises and a SWOT Analysis you'll identify opportunities on how you can best partner with your customers in the future.
- The course culminates with you presenting your strategic solutions to your target client and then guides you through a goal setting exercise you can apply to your future endeavors. The recommended amount of time to complete the course is *35 hours*.

Is CASE a true certification?

- No. CASE is a *certificate* program, which means it is a designation owned and managed by PCMA to educate and assess participants according to learning objectives created specifically for the program.
- The CASE title and designation may not be used to imply that you or your organization is certified or accredited. The designation "CASE" is a trademarked property and its use is subject to approval by PCMA.

- CASE is, at the same time, an honorary designation that is widely recognized by the association market. Associations are trained to look for CASE designation and more often do business with individuals who have completed the program.
- Once you have earned your CASE post-nominal designation, you may use it on business correspondence, such as on company letterhead, business cards, in advertising, and in public presentations.

I have been in sales for several years- why should I take the CASE course?

- The course is designed to help you understand the association market and better partner with associations. You will understand the decision-making process and what is important to associations.
- CASE is an honorary designation, but widely recognized by the association market. Associations are trained to look for CASE designation and more often do business with those who are certified.

### **Pricing and Purchase Details**

How much does the course cost?

- The CASE Course is \$795 for non-members, and \$695 for PCMA members.

Is the course fee the only rate I have to pay to earn the certificate, or are there additional expenses?

- Your one-time fee includes all books and materials necessary for the course.

How do I obtain the group rate of \$595/Participant for 3 or more from the same organization?

- In order to receive the group rate, you must purchase a license. One license is required for each person who is taking the course and you must purchase all the licenses all at the same time. If you are interested in purchasing CASE for a group of individuals, please contact [membership@pcma.org](mailto:membership@pcma.org), or 877.827.7262, and our Member Services team can assist.

Does this issue us a license number for each person that we then provide her for her login/use?

- Yes. Each person will be given their license number. They will then have to login/create an account and enter the license number on the CASE Course page. We will also need each individual's shipping address to send the course materials.

I am a current member of PCMA, and according to the website, the cost should be \$695.00. During the purchase process, it wants to charge me \$795. Can you let me know how this can be corrected?

- Yes – please contact [education@pcma.org](mailto:education@pcma.org) and they will make sure your account is updated.

### **Structure of the CASE Course**

What are the Module topics?

- Module 1 - The Business of Associations: Structure and Governance
- Module 2 - The Business of Associations: Departments and Functions
- Module 3 - Assessing the Marketplace: Strategy and Innovation
- Module 4 - Education and Meetings: Elements for Effective Programs
- Module 5 - Social Trends: The Changing Dynamics of Meetings and Events
- Module 6 - Strategic Meetings Management: Aligning with Organizational Objectives

- Module 7 - Sponsorship and Strategic Partnerships: Strategies for Success
- Module 8 - Understanding the Needs of Your Clients: Moving Beyond Transactions
- Module 9 - Building Long-Term Business Relationships: Collaboration and Creating Value
- Module 10 - Building Long-Term Business Relationships: Part Two

What does each CASE Module include?

- Instructional slides – provides introductory information to the module topic
- Assigned readings – offers more in-depth instruction
- Review Quiz (Modules 1-9)
- Learning Activities - The first 6 modules teach you about structure, governance, importance of meetings in revenue, alignment with organization objectives, and the last 3 teach you how to apply sales strategies to association world. You complete the account plan, SWOT analysis, and customized presentation in Module 10.

Can you tell me more about the final module presentation?

- The Module 10 presentation is a cumulative review of all the work completed in previous modules. You create a PowerPoint presentation as if you were presenting to your chosen association. You must submit the PPT to PCMA's Education Department ([education@pcma.org](mailto:education@pcma.org)) to complete the course and receive credit.

Will the course platform save my Learning Activities within each module?

- No. All the Learning Activities are linked documents (PDF, PPT, DOC) that you **must** save to your own computer. If you do not save, the information will not be retained in the course platform.

How long does it typically take to finish the CASE course?

- The ten module course is self-paced and allows you to complete the course work, on your schedule, and access the materials for up to 12 months from the date of registration. The recommended amount of time to complete the course is 70 hours.

### **Continuing Education Units**

How many CEUs do I earn by completing the course?

- You earn 7.0 CEUs upon completion of the course.

### **Technical Help & More Information**

Who can I contact if I have more questions?

- Please contact technical support via our platform host, Peach New Media, at [support@pcma.org](mailto:support@pcma.org) or via phone at 866-702-3278.