



## CASE STUDY

# Transitioning to a Hybrid Test-Delivery Model

Introducing remote assessment technology, enabling greater flexibility and convenience for candidates, and maintaining test programme integrity



## Background.

Chartered Institute for Securities & Investment (CISI) is the leading professional body for securities, investment, wealth, and financial planning professionals. Its purpose is to champion lifelong learning and integrity, raising individual standards of knowledge, skills, and behaviors globally to enhance public trust and confidence in financial services.

Since 2004, CISI has utilised Prometric as a trusted assessment services partner. This partnership started with test delivery in the UK of computer-based exams, certifying thousands of candidates to work or progress their careers in the financial services industry. Since then, CISI's programme has expanded globally to enable candidates to take an exam in over 85 countries in a mixture of Prometric professional test centres and CISI-approved partner locations using the Prometric Assessment System and Prometric-defined security processes and protocols. CISI offers more than 100 different exam titles in six languages to meet the needs of candidates and regulatory bodies around the world.

## COVID Situation & Impact.

The COVID-19 global pandemic had an immediate and dramatic impact on the CISI testing programme. In March 2020, Prometric made the difficult, but necessary decision to close its global test centre network to limit the transmission of the coronavirus and preserve the health and well-being of staff and test takers.

## Overview

### Location

London, U.K., global, & remote

### Challenge

With the COVID-19 pandemic causing candidate backlogs and limited capacity options during the initial closing and then re-opening of test centres, CISI and Prometric recognised the urgency to add a remote assessment option to the testing programme.

### Outcome

Successfully implemented a remote testing solution via the ProProctor platform—providing candidates with the choice and flexibility over where to take their exam, without sacrificing or compromising security.

<https://www.cisi.org/cisiweb2>

This action followed regional mandates and then-current advice of leading international public health organisations which went on for several months. As test centres slowly started to re-open under national and regional government restrictions, capacity and choice of testing location was significantly restricted. The limited global capacity was not enough to meet the demand from CISI candidates wishing to test due to an appointment backlog. Additionally, other candidates were understandably anxious about attending a test centre during the COVID-19 crisis.

To fulfill its mission and support financial professionals in advancing their careers through this difficult period, CISI and Prometric recognised the urgency to add a remote assessment option to the testing programme. To be successful, this mode of testing would need to provide a comparable experience and outcome to that of the test centre delivery model, while also ensuring the security and integrity of the testing experience, and protecting the CISI exam content. The pandemic crisis simultaneously forced the rapid evolution of Prometric's remote assessment platform, ProProctor™—creating the need for additional strategic solutions to help launch CISI's remote assessment programme quickly, securely, and at the scale needed to meet the evolving needs of candidates. A major benefit to CISI and their candidates was that the Prometric Assessment System technology used to deliver CISI exams in a test centre is integrated with the ProProctor platform—meaning a CISI candidate would receive a very similar exam experience whether they tested remotely or at a test centre.

## Strategy.

At the start of the implementation process, Prometric and CISI established a cadence of regular meetings to work through the requirements process that provided candidates **choice and flexibility**. It was agreed from the outset that the objective of the final service offering was to allow CISI candidates the choice to attend at a test centre, or to take a test in the comfort and safety of their own home or own office location using the ProProctor remote assessment platform.

**Collaborated on the requirements process to ensure choice and flexibility for candidates were prioritised.**



CISI and Prometric worked together to create an implementation plan, ensuring all key requirements, dependencies, and actions were captured, and key milestones and risk mitigation factors were included. Implementation of the ProProctor remote assessment solution for the CISI programme involved rigorous testing before it was launched for candidates. A significant factor that widely contributed to CISI's success in implementing ProProctor was its communication strategy with stakeholders and candidates. CISI and Prometric worked together to ensure candidates were prepared ahead of time for the technical and security standards required for ProProctor exam delivery, and that they understood how the security measures would be upheld. The communication strategy also helped candidates prepare their space for remote exam delivery, and clear guidelines provided helped candidates successfully prepare for their exams.

Additionally, CISI had some unique programme requirements including the use of a digital scratchpad feature to provide content security, while allowing candidates to take notes digitally. The launch of the digital scratchpad on the ProProctor platform kept candidates from taking notes on paper – ensuring exam content was not compromised.

## Positive Outcome.

CISI and Prometric were able to successfully complete the implementation and manage any minor issues that arose, thanks to a long-term positive relationship and collaborative partnership. Prometric's team listened to CISI's specific needs, as well as direct candidate feedback, and constantly worked on enhancing the ProProctor platform to meet the needs of both CISI and its candidates. The teams continue to work closely since the January 2021 launch to monitor the statistics and performance of the ProProctor remote assessment platform, review all candidate feedback, and take joint action to strengthen and improve service.

**Implemented a digital scratch pad helped ensure exam content was not compromised.**



**50% of CISI candidates prefer to take their certifications via the ProProctor platform.**

In addition to ensuring business continuity during a global pandemic, evolving CISI's programme to include remote assessment has been a resounding success. Thousands of candidates have now tested successfully through ProProctor testing platform and demand for remote assessment continues to remain high. Today, **50 percent** of CISI candidates prefer to take their certifications via the ProProctor platform.



**John Preston**

Chief Operating Officer, CISI

*Enabling our candidates to choose between taking an exam at home or in-person at a Prometric test centre has enabled CISI to continue to meet the changing needs of financial professionals around the world. Our ongoing partnership with Prometric and their ability to quickly evolve the ProProctor platform to meet our programme's needs were imperative in helping us quickly and successfully implement a remote assessment solution.*

## Learn More

Learn more about our Test Development and Delivery Solutions by visiting [www.prometric.com](http://www.prometric.com) or by calling toll-free **1-877-725-3708**.

Prometric enables test owners worldwide to advance their credentialing programmes through test development and delivery solutions that set the standard in quality and service excellence. Our unwavering commitment to service is evident in every encounter—through a remarkable track record of delivering consistently reliable assessments, accurate results, candidate convenience, testing flexibility, stringent security, and service innovation on a global scale.