



## CTSM Portfolio Advisor Guidelines

### Candidate Portfolio

The following guidelines are designed to offer some direction on your role as a CTSM Candidate Portfolio Advisor. As you work with your first advisees, please submit feedback as to how the interaction is working along with suggestions to help make the process as efficient as possible. The purpose of the guidelines is to assist you in supporting the advisees with their written portfolio requirements and to make your role as a CTSM advisor enjoyable.

#### **CTSM – Our Picture of the Advisor Role**

We see the advisor as the “voice of experience” to guide a candidate through the process of developing and submitting the Candidate Portfolio. You can anticipate offering encouragement, answering any questions the candidate has regarding format and content, and also offering constructive review and feedback on the candidate’s portfolio before it is submitted to the CTSM office.

Most of your communication will be by phone and email; however, if there is an opportunity for you to meet at a show you are mutually attending, that would be a nice personal connection.

Keep in mind that in the Candidate Portfolio component of certification we are looking for application of skills required of the exhibit/event marketing professional. Therefore, it should be based on real life schedules, projects, and measurements for which the candidate has been responsible. If the candidate does not have responsibility for some aspects of the project, they need to get the information from the responsible party, noting how they work together. Critical to the acceptance of a portfolio are setting measurable objectives and tying results back to them. We are also looking for seminar references that helped the candidate improve his/her trade show program and supporting visual exhibits. The references should not merely be a listing of seminars but should indicate what the candidate learned from each specific reference and how he/she applied that knowledge.

#### **Candidate Contacts**

The following list indicates the minimum correspondence we recommend having with each candidate you advise. Your schedule for these will vary by candidate. (In most cases there will be more).

- 1. Receive e-mail from candidate.** This should provide you with a brief bio on the candidate, his/her company and the candidate’s role within the company to help you better understand the person you will be working with and the industry he/she is in.

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- 2. Initial contact with candidate.** It is imperative that you always reply within 48 hours and confirm receipt of their material. Plan to talk with your candidate by phone as the “get acquainted” step. Prior to contacting the candidate, refresh your memory by reviewing the Candidate Portfolio requirements and the evaluation form. Areas to cover in the initial contact:

  - Introduce yourself and provide some background on your responsibilities in your company
  - Check if they have reviewed the portfolio requirements
  - Find out when they anticipate completing all requirements and receiving their certification
  - Ask if they have any initial questions
  - Both you and the advisee should use the Candidate Portfolio Checklist as the writing/reviewing progresses to be sure nothing is missing.
- 3. Notify CTSM office ([CTSM@exhibitorgroup.com](mailto:CTSM@exhibitorgroup.com)).** Let us know when you have actively begun to work with each candidate.
- 4. E-mail/phone/text responses.** When the candidate contacts you with questions, offer your recommendations. It is imperative that you always reply within 48 hours and confirm receipt of their material.
- 5. Review Rough Drafts of Portfolio Sections.** When providing feedback on the candidate’s sections, it is important that you use the Candidate Portfolio Checklist and/or the Candidate Portfolio Evaluation Form as your guide in making recommended changes or additions. It’s easiest if they send sections to you for review, rather than the entire document. It is imperative that you always reply within 48 hours and confirm receipt of their material. Return your feedback **within 2 weeks**. Two weeks is the maximum expected turn-around time.
- 6. Review of the final document pre-submission. It is now required** that advisees share their finished document with their advisors prior to submission, and there is a “sign-off” sheet for you to send to the CTSM office, letting us know that you have seen the final version. This can be done by emailing CTSM with your final comments or any concerns you have.
- 7. Receive notification on the portfolio results.** You will be notified of the results of your candidate’s portfolio project. Please watch for this.

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8. **Make a follow-up call or send e-mail message to the candidate.** If the portfolio was not accepted, feel free to discuss the evaluation with the CTSM Executive Advisor prior to talking with the candidate. If the portfolio was accepted, send a note of congratulations.
9. **Follow up with CTSM office.** Provide feedback on how the advisor/advisee relationship went and any recommendations for improvement.

**Estimated Time Commitment:**

- 15 minutes – initial phone contact
- 60-90 minutes – evaluation of each portfolio section
- 15-30 minutes – follow-up with candidate after evaluation
- 1 hour – misc. other contact time with candidate or CTSM office
- 60-90 minutes – final submission review

Total estimated time with each candidate: 6-7 hours, spread out over time

**Note:** This estimate is based upon my serving in the advisor capacity during the first year of the portfolio requirement. This will need to be monitored.

Thank you for volunteering to serve as a CTSM advisor. If at any time you have suggestions on improving this process, please contact us at [ctsm@exhibitorgroup.com](mailto:ctsm@exhibitorgroup.com).

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