



Questionmark Case Study

AIMR Self-Tests Help Association Members Pursue Professional Development

Background

The Association for Investment Management and Research (AIMR) is an international, nonprofit organization of more than 68,000 investment practitioners and educators in over 117 countries.

AIMR's mission is to serve its members and investors as a global leader in educating and examining investment managers and analysts and sustaining high standards of professional conduct.

Scenario

AIMR offers services in three broad categories:

- Education through seminars and publications;
- Professional Conduct and Ethics; and
- Standards of Practice and Advocacy.

Its voluntary professional development program provides self-tests based on proceedings of the association's many conferences and on AIMR's Investment Performance Standards and Ethical Standards of Practice.

Solution

AIMR offers Web-based Perception self-tests to help members check their knowledge of the material covered in conference proceedings and the association's standards documents, which are available on the organization's website.

Each of the online publications includes a link which enables the member to go directly to the appropriate self-test by way of a customized self-registration module created by Questionmark Consulting Partners Enginet Technologies.

For members who study the printed publications, the appropriate self-test can be accessed from a link found on the organization's professional development website.

Each of the Perception tests includes 35 to 40 questions, 70 percent of which must be answered correctly to earn Professional Development credits. When a member successfully completes a self-test, credits are applied directly to their professional development Web-based diary. They can also obtain a print-out verifying their completion of the test.

Results

Perception is enabling AIMR to achieve its goal of providing members with a time efficient, easy, and reputable way to earn and document their professional development efforts.

Once the idea of online testing for professional development credit takes hold with organization members, AIMR plans to expand its self-testing program to other AIMR publications, including the *Financial Analyst Journal*.

"As a global organization with a fast-growing contingent of members outside North America, we realize that the Web offers a cost-effective way for us to help our members participate in the AIMR Professional Development Program," comments Christina Negovan, AIMR's Planning and Professional Development division project and quality assurance manager. "Online assessments make it easy to verify that members have understood the professional development content in our publications. It strongly encourages commitment to the association's high standards of professional conduct and participation in our voluntary professional development program."

More information

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