
Domains of
Practice
for
Professional
Services
Marketers



Society for Marketing
Professional Services

**Certified Professional
Services Marketer**

THE Society for Marketing Professional Services (SMPS) is committed to being the premier source for education and information in marketing professional services in the build and natural environment. In keeping with this mission, SMPS has conducted a practice analysis of professional services marketing to articulate and confirm the profession's body of knowledge and the skills most critical to professional competence. These knowledge and skill sets are classified under the six domains outlined on the following pages.

The domains of practice are the foundation of SMPS' Certified Professional Services Marketer (CPSM) Program. Certification is a time-tested means of measuring a professional's credentials. To earn the CPSM designation, candidates must meet educational and experience requirements, pass a rigorous written examination to assess their mastery of the domains, and pledge to abide by the CPSM code of ethics. Successful candidates are recognized as having what it takes to generate profitable business in the architectural, engineering, and construction (A/E/C) marketplace—the broad knowledge and skill sets to market professional services.

SMPS offers publications, workshops, online resources, and an annual marketing conference in support of professional services marketing in the A/E/C industry. To learn more about SMPS, the CPSM Program, or the domains of practice for marketing professional services, please contact the SMPS National Office at 800.292.7677 or visit the Society's Web site at www.smeps.org.

Domain
1

MARKETING RESEARCH

Knowledge Areas

- Data-gathering techniques
- Sources of social, cultural, economic, and federal, state, and local regulatory information
- Newspapers, magazines, and other publications related to target markets
- Research design
- Techniques for qualitative and quantitative data analysis
- Methods for forecasting trends

Skill Set

- Establish methodologies for collecting and evaluating information, from within the firm and from external sources, on potential teaming and business opportunities
- Monitor social, demographic, cultural, and economic trends for broad-based marketing and business implications
- Monitor legislative and/or regulatory activities that could affect the need for services
- Monitor sources of industry-related market information
- Develop and maintain a network of corporate, industry, government, municipal, and community contacts to keep abreast of industry, client, and competitor activity
- Design, implement, and/or evaluate research studies of markets, competitors, and/or client prospects

Domain
2

MARKETING PLAN

Knowledge Areas

- SWOT of firm and personnel
- Elements of strategic plans, marketing plans, and business plans
- Techniques for facilitating the planning process
- Cost/benefits of various marketing techniques
- Basic management principles
- Elements of an internal marketing audit
- Methodologies for budget development
- Basic accounting principles
- Cost tracking and control procedures

Skill Set

- Analyze research data related to past, current, and prospective markets and relevant corporate experience
- Participate in the firm's strategic planning
- Select target markets based on research results
- Create a marketing plan, including specific goals, objectives, strategies, action plans, and schedules for each target market
- Manage implementation of the firm's marketing plan
- Evaluate and report progress in implementing a marketing plan and revise goals, objectives, and priorities as appropriate
- Create a marketing budget
- Manage a marketing budget

Domain
3

CLIENT AND BUSINESS DEVELOPMENT

Knowledge Areas

- Strategic planning techniques
- Interpreting and applying market research results to client and business development, prospect information sources
- Techniques used to screen and classify prospects
- Key elements of contact management programs and databases
- Methods for initiating client research calls and maintaining contact
- Fostering/building client relations
- Effective frequency of client contact
- Methods for conducting client perception studies

SOQs | PROPOSALS

Skill Set

- Create business development guidelines and strategies for pursuing clients or projects
- Screen or pre-qualify client or project leads from market research, referrals, contacts, cold calls, and other sources to establish new client relationships and to ascertain project opportunities, interest/appropriateness, and requirements of follow-up calls
- Develop, implement, and monitor contact management process
- Initiate and maintain ongoing contact with prospective clients to build a professional relationship and project opportunities
- Initiate, follow up, and maintain contact with current and past clients to track client satisfaction and initiate corrective action, if needed.

Knowledge Areas

- RFQ/RFP criteria and decision/selection process
- Fee pricing/budgeting
- Federal, state, and local laws and regulations
- Federal, state, and local forms and guidelines
- Architectural and engineering terminology
- Scheduling and tracking systems for individual proposal elements and status
- Graphic design and production
- Resources and products for SOQ/proposal production, including printing and binding
- Desktop publishing software
- Managing activities of specialized consultants
- Presentation software
- Visual aids for use in presentations
- Procedures for a post-presentation or post-contract award debriefing

Skill Set

- Conduct/participate in an RFQ/RFP review and/or strategy session to analyze a potential client in terms of target market, project size, probability of selection, and timing in order to recommend a go/no-go decision
- Develop strategies to produce SOQs/proposals
- Manage the preparation and draft the content of proposals, SOQs, letters of interest, and responses to inquiries
- Produce SOQs/proposals, including typing, editing, graphics, reproduction, binding, and mailing, to ensure that all RFQ/RFP criteria are met
- Develop a presentation strategy, structure, and style and assist in selecting a presentation team
- Prepare or assemble written and visual information for presentations
- Coordinate/coach presentation rehearsals
- Conduct a post-presentation follow-up internally and with the prospective client
- Conduct post-award debriefings with prospects regardless of outcome and revise business development and SOQ/proposal strategies as appropriate
- Perform contract negotiations, including preparation of draft, negotiations, and execution of contract

PROMOTIONAL ACTIVITY

Knowledge Areas

- Interpreting the results of client perception surveys and image studies
- Communicating the firm's image and objectives
- Procedures to evaluate the effectiveness of promotional activity
- Advertising media
- Business/social etiquette and protocol
- Trade show event management
- Industry/media/civic events
- Technical and journalistic publication writing techniques
- Sources for a press list
- Format and content of promotional publications
- Tailoring promotional materials to a target audience
- Graphic design
- Printing
- Copyright laws and authorized use of visuals
- Web page design
- Information delivery methods
- Slide production requirements and costs
- Production and use of photography
- Techniques to qualify, interview, and select vendors and consultants
- Awards programs, submission guidelines, and deadlines
- Special events planning
- Create slide shows for presentations
- Coordinate finished project photography
- Select, manage, and direct the activities of specialized consultants
- Prepare and coordinate awards competition entries
- Coordinate firm special events

Skill Set

- Develop image and corporate identity
- Manage promotional program expenditures to ensure consistency with the budget
- Develop an advertising plan to support the firm's marketing program objectives
- Develop corporate entertainment strategies to ensure maximum exposure
- Represent the firm at media events, civic and professional group meetings, client industry trade associations, and community and industry activities to enhance the image of the company
- Write press releases, journal articles, and/or newsletters to generate publicity for the firm
- Create written/print promotional materials consistent with an overall marketing and business plan and update on a regular basis; create electronic promotional materials consistent with the overall marketing and business plan and update on a regular basis

INFORMATION, RESOURCE, AND ORGANIZATIONAL MANAGEMENT

Knowledge Areas

- Management and motivational techniques
- Record management systems for project, personnel, consultant, proposal, and/or visual information
- Computerized database management systems
- Staff training techniques
- Individual and group dynamics
- Leadership and team-building principles
- Evaluation techniques for design/production efficiency and quality control
- Promoting and rewarding high-quality team performance and effective client service
- Techniques for resource management and costs/benefit analysis

Skill Set

- Manage/supervise the activities of marketing and support staff
- Coordinate marketing efforts and provide a communication link across departments, disciplines, and/or branch offices
- Develop and maintain systems to extract, categorize, and retrieve information related to consultants, personnel, projects, prior proposals, boilerplate, visuals, mailing lists, and promotional items
- Develop and maintain an internal communications program to facilitate information sharing within the firm; inform and involve the principals and technical staff regarding marketing efforts
- Conduct marketing-related workshops/training for the principals and technical staff
- Attend professional development activities
- Monitor information, resource, and organizational expenditures to ensure consistency with budget
- Recruit and keep star performers
- Build high-performance teams linked to key client groups
- Refine the design/production process to improve efficiency and quality control



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123 North Pitt Street
4th Floor
Alexandria, VA 22314
www.smps.org