

Gap Analysis *for* Professional Services Marketers

The Domains of Practice for Professional Services Marketers are your guide to career success. Use the following gap analysis to conduct a personal inventory of your knowledge and skill in each domain, identifying areas where you are strong or need improvement. Follow this scale to score your responses:

1 No understanding, skill, or experience	2 Some understanding, skill, or experience	3 Working understanding, skill, or experience	4 Strong understanding, skill, or experience	5 Mastery understanding, skill, or experience
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Once you have completed the ratings for “Present Level” and “Needed Level,” add your totals for the domain. Subtract the Present Level from the Needed Level to determine your level of competency in the domain. You can set your professional development goals by focusing on the domains where you have the highest score differences.

To determine specific knowledge areas and skill sets where you have gaps, highlight the items under each domain where you have the greatest difference between Present Level and Needed Level.



Certified Professional Services Marketer Program

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Present Level
(circle one)

Needed Level
(circle one)

Domain 1: Marketing Research

Knowledge Areas

A. data-gathering techniques	1 2 3 4 5	1 2 3 4 5
B. sources of social, cultural, economic, federal, state, and local regulatory information	1 2 3 4 5	1 2 3 4 5
C. newspapers, magazines, and other publications related to target markets	1 2 3 4 5	1 2 3 4 5
D. research design	1 2 3 4 5	1 2 3 4 5
E. techniques for qualitative and quantitative data analysis	1 2 3 4 5	1 2 3 4 5
F. methods for forecasting trends	1 2 3 4 5	1 2 3 4 5

Skill Set

G. establish methodologies for collecting and evaluating information, from within the firm and from external sources, on potential teaming and business opportunities	1 2 3 4 5	1 2 3 4 5
H. monitor social, demographic, cultural, and economic trends for broad-based marketing and business implications	1 2 3 4 5	1 2 3 4 5
I. monitor legislative and/or regulatory activities that could affect the need for services	1 2 3 4 5	1 2 3 4 5
J. monitor sources of industry-related market information	1 2 3 4 5	1 2 3 4 5
K. develop and maintain a network of corporate, industry, government, municipal, and community contacts to keep abreast of industry, client, and competitor activity	1 2 3 4 5	1 2 3 4 5
L. design, implement, and/or evaluate research studies of markets, competitors, and/or client prospects	1 2 3 4 5	1 2 3 4 5

Total for Domain 1: _____

Difference: _____

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Present Level
(circle one)

Needed Level
(circle one)

Domain 2: Marketing Plan

Knowledge Areas

A. SWOT of firm and personnel	1 2 3 4 5	1 2 3 4 5
B. elements of strategic plans, marketing plans, and business plans	1 2 3 4 5	1 2 3 4 5
C. techniques for facilitating the planning process	1 2 3 4 5	1 2 3 4 5
D. cost/benefits of various marketing techniques	1 2 3 4 5	1 2 3 4 5
E. basic management principles	1 2 3 4 5	1 2 3 4 5
F. elements of an internal marketing audit	1 2 3 4 5	1 2 3 4 5
G. methodologies for budget development	1 2 3 4 5	1 2 3 4 5
H. basic accounting principles	1 2 3 4 5	1 2 3 4 5
I. cost tracking and control procedures	1 2 3 4 5	1 2 3 4 5

Skill Set

J. analyze research data related to past, current, and prospective markets and relevant corporate experience	1 2 3 4 5	1 2 3 4 5
K. participate in the firm's strategic planning	1 2 3 4 5	1 2 3 4 5
L. select target markets based on research results	1 2 3 4 5	1 2 3 4 5
M. create a marketing plan, including specific goals, objectives, strategies, action plans, and schedules for each target market	1 2 3 4 5	1 2 3 4 5
N. manage implementation of the firm's marketing plan	1 2 3 4 5	1 2 3 4 5
O. evaluate and report progress in implementing a marketing plan and revise goals, objectives, and priorities as appropriate	1 2 3 4 5	1 2 3 4 5
P. create a marketing budget	1 2 3 4 5	1 2 3 4 5
Q. manage a marketing budget	1 2 3 4 5	1 2 3 4 5

Total for Domain 2: _____

Difference: _____

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Present Level
(circle one)

Needed Level
(circle one)

Domain 3: Client and Business Development

Knowledge Areas

A. strategic planning techniques	1 2 3 4 5	1 2 3 4 5
B. interpreting and applying market research results to client and business development, prospect information sources	1 2 3 4 5	1 2 3 4 5
C. techniques used to screen and classify prospects	1 2 3 4 5	1 2 3 4 5
D. key elements of contact management programs and databases	1 2 3 4 5	1 2 3 4 5
E. methods for initiating client research calls and maintaining contact	1 2 3 4 5	1 2 3 4 5
F. fostering/building client relations	1 2 3 4 5	1 2 3 4 5
G. effective frequency of client contact	1 2 3 4 5	1 2 3 4 5
H. methods for conducting client perception studies	1 2 3 4 5	1 2 3 4 5

Skill Set

I. create business development guidelines and strategies for pursuing clients or projects	1 2 3 4 5	1 2 3 4 5
J. 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	1 2 3 4 5	1 2 3 4 5
K. develop, implement, and monitor contact management process	1 2 3 4 5	1 2 3 4 5
L. initiate and maintain ongoing contact with prospective clients to build a professional relationship and project opportunities	1 2 3 4 5	1 2 3 4 5
M. initiate, follow up, and maintain contact with current and past clients to track client satisfaction and initiate corrective action, if needed	1 2 3 4 5	1 2 3 4 5

Total for Domain 3:

Difference:

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Present Level
(circle one)

Needed Level
(circle one)

Domain 4: SOQs/Proposals

Knowledge Areas

A. RFQ/RFP criteria and decision/selection process	1 2 3 4 5	1 2 3 4 5
B. fee pricing/budgeting	1 2 3 4 5	1 2 3 4 5
C. federal, state, and local laws and regulations	1 2 3 4 5	1 2 3 4 5
D. federal, state, and local forms and guidelines	1 2 3 4 5	1 2 3 4 5
E. architectural and engineering terminology	1 2 3 4 5	1 2 3 4 5
F. scheduling and tracking systems for individual proposal elements and status	1 2 3 4 5	1 2 3 4 5
G. graphic design and production	1 2 3 4 5	1 2 3 4 5
H. resources and products for SOQ/proposal production, including printing and binding	1 2 3 4 5	1 2 3 4 5
I. desktop publishing software	1 2 3 4 5	1 2 3 4 5
J. managing activities of specialized consultants	1 2 3 4 5	1 2 3 4 5
K. presentation software	1 2 3 4 5	1 2 3 4 5
L. visual aids for use in presentations	1 2 3 4 5	1 2 3 4 5
M. procedures for a post-presentation or contract award debriefing	1 2 3 4 5	1 2 3 4 5

Skill Set

N. 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	1 2 3 4 5	1 2 3 4 5
O. develop strategies to produce SOQs/proposals	1 2 3 4 5	1 2 3 4 5
P. manage the preparation and draft the content of proposals, SOQs, letters of interest, and responses to inquiries	1 2 3 4 5	1 2 3 4 5

	Present Level (circle one)	Needed Level (circle one)
Q. produce SOQs/proposals, including typing, editing, graphics, reproduction, binding, and mailing, to ensure that all RFQ/RFP criteria are met	1 2 3 4 5	1 2 3 4 5
R. develop a presentation strategy, structure, and style and assist in selecting a presentation team	1 2 3 4 5	1 2 3 4 5
S. prepare or assemble written and visual information for presentations	1 2 3 4 5	1 2 3 4 5
T. coordinate/coach presentation rehearsals	1 2 3 4 5	1 2 3 4 5
U. conduct a post-presentation follow-up internally and with the prospective client	1 2 3 4 5	1 2 3 4 5
V. conduct post-award debriefings with prospects regardless of outcome and revise business development and SOQ/proposal strategies as appropriate	1 2 3 4 5	1 2 3 4 5
W. perform contract negotiations, including preparation of draft, negotiations, and execution of contract	1 2 3 4 5	1 2 3 4 5

Total for Domain 4:

Difference:

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Present Level
(circle one)

Needed Level
(circle one)

Domain 5: Promotional Activity

Knowledge Areas

A. interpreting the results of client perception surveys and image studies	1	2	3	4	5	1	2	3	4	5
B. communicating the firm's image and objectives	1	2	3	4	5	1	2	3	4	5
C. procedures to evaluate the effectiveness of promotional activity	1	2	3	4	5	1	2	3	4	5
D. advertising media	1	2	3	4	5	1	2	3	4	5
E. business/social etiquette and protocol	1	2	3	4	5	1	2	3	4	5
F. trade show event management	1	2	3	4	5	1	2	3	4	5
G. industry/media/civic events	1	2	3	4	5	1	2	3	4	5
H. technical and journalistic publication writing techniques	1	2	3	4	5	1	2	3	4	5
I. sources for a press list	1	2	3	4	5	1	2	3	4	5
J. format and content of promotional publications	1	2	3	4	5	1	2	3	4	5
K. tailoring promotional materials to a target audience	1	2	3	4	5	1	2	3	4	5
L. graphic design	1	2	3	4	5	1	2	3	4	5
M. printing	1	2	3	4	5	1	2	3	4	5
N. copyright laws and authorized use of visuals	1	2	3	4	5	1	2	3	4	5
O. web page design	1	2	3	4	5	1	2	3	4	5
P. information delivery methods	1	2	3	4	5	1	2	3	4	5
Q. slide production requirements and costs	1	2	3	4	5	1	2	3	4	5
R. production and use of photography	1	2	3	4	5	1	2	3	4	5
S. techniques to qualify, interview, and select vendors and consultants	1	2	3	4	5	1	2	3	4	5
T. awards programs, submission guidelines, and deadlines	1	2	3	4	5	1	2	3	4	5
U. special events planning	1	2	3	4	5	1	2	3	4	5

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Present Level
(circle one)

Needed Level
(circle one)

Domain 6: Information, Resource, and Organizational Management

Knowledge Areas

A. management and motivational techniques	1 2 3 4 5	1 2 3 4 5
B. records management systems for project, personnel, consultant, proposal, and/or visual information	1 2 3 4 5	1 2 3 4 5
C. computerized database management systems	1 2 3 4 5	1 2 3 4 5
D. staff training techniques	1 2 3 4 5	1 2 3 4 5
E. individual and group dynamics	1 2 3 4 5	1 2 3 4 5
F. leadership and team-building principles	1 2 3 4 5	1 2 3 4 5
G. evaluation techniques for design/production efficiency and quality control	1 2 3 4 5	1 2 3 4 5
H. promoting and rewarding high-quality team performance and effective client service	1 2 3 4 5	1 2 3 4 5
I. techniques for resource management and costs/benefit analysis	1 2 3 4 5	1 2 3 4 5

Skill Set

J. manage/supervise the activities of marketing and support staff	1 2 3 4 5	1 2 3 4 5
K. coordinate marketing efforts and provide a communication link across departments, disciplines, and/or branch offices	1 2 3 4 5	1 2 3 4 5
L. develop and maintain systems to extract, categorize, and retrieve information related to consultants, personnel, projects, prior proposals, boilerplate, visuals, mailing lists, and promotional items	1 2 3 4 5	1 2 3 4 5
M. 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	1 2 3 4 5	1 2 3 4 5

	Present Level (circle one)	Needed Level (circle one)
N. conduct marketing-related workshops/training for the principals and technical staff	1 2 3 4 5	1 2 3 4 5
O. attend professional development activities	1 2 3 4 5	1 2 3 4 5
P. monitor information, resource, and organizational expenditures to ensure consistency with budget	1 2 3 4 5	1 2 3 4 5
Q. recruit and keep star performers	1 2 3 4 5	1 2 3 4 5
R. build high-performance teams linked to key client groups	1 2 3 4 5	1 2 3 4 5
S. refine the design/production process to improve efficiency and quality control	1 2 3 4 5	1 2 3 4 5

Total for Domain 6:

Difference:
