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This handbook contains necessary information about the Certified Professional Services Marketer Examination (CPSM). Please retain it for future reference. Candidates are responsible for reading these instructions carefully. This handbook is subject to change.
CPSM MISSION STATEMENT
The Society for Marketing Professional Services (SMPS) is committed to being the premier resource for education and information in marketing professional services. The Society’s certification program seeks to enhance the professional standing of professional services marketers with their employers, their peers, and the public.

The Certified Professional Services Marketer (CPSM) is recognized as an individual who has met a rigorous standard of experience and expertise in marketing professional services and who agrees to adhere to the ethics and responsibilities of the profession as outlined in the CPSM Code of Ethics.

PURPOSE OF THE CPSM PROGRAM
Elevating the Professional Standard
Candidates who apply for the CPSM designation are taking their first step toward joining a distinguished group of professionals who have made a commitment to excellence in career advancement and to an ongoing pursuit of knowledge. The CPSM examination is intended to test the knowledge of those individuals involved in marketing or business development for firms providing professional services.

This voluntary certification is designed to:
- raise the professional standards and stature of the professional practice
- encourage self-assessment by offering guidelines for achievement in the profession
- identify and award recognition to persons who have demonstrated knowledge and skills of the practice and related disciplines through a test of competency
- increase recognition for the profession and the industry
- influence the future direction of the profession

The CPSM designation is a mark of distinction and offers you a wide range of important benefits:
- improved ability to compete in the job market
- enhanced credibility as a professional
- potential for increased compensation and benefits

ADMINISTRATION OF THE CPSM PROGRAM
The CPSM examination is offered solely by the Society for Marketing Professional Services. SMPS’s specific responsibilities are the development, administration, and ongoing evaluation of the certification program. The SMPS Headquarters address is:

Society for Marketing Professional Services
123 N. Pitt Street, Suite 400, Alexandria, VA 22314 www.smps.org
Tel: 800.292.7677 or 703.549.6117 Fax: 703.549.2498

Questions regarding the certification process may be referred to the Professional Testing Corporation, 212.356.0660 or ptcny@ptcny.com.
Test construction and administration services for the CPSM examination are provided by:

Professional Testing Corporation (PTC)
1350 Broadway, 17th Floor
New York, NY 10018
Web Site: www.ptcny.com
Tel: 212.356.0660   Fax: 212.356.0678

GENERAL INFORMATION
Eligibility Requirements
Candidates must meet the following requirements to be eligible to take the CPSM examination:
• a bachelor’s degree or higher plus four years of experience in marketing or business
development for firms providing professional services, or
• an associate’s degree plus six years of experience in marketing or business development for
firms providing professional services, or
• without a degree, eight years of experience in marketing or business development for firms
providing professional services
• a pledge to abide by the CPSM Code of Ethics (see appendix 1)

Application Process
1. Read and follow the directions on the application and in this handbook. All applications must
be completed online. The application can be found on Professional Testing Corporation’s
2. Complete the online application, upload a copy of your degree or transcript, and pay the
appropriate fee.
   • Eligible candidates have one year from the date their application is approved to sit for the
   CPSM examination.
   • Candidates who fail and wish to retake the examination may do so upon submission of a
   new application and payment of the retesting fee.

Fees
Fees for the CPSM examination

<table>
<thead>
<tr>
<th></th>
<th>Application</th>
<th>Examination</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>Member Fee</td>
<td>$245</td>
<td>$275</td>
<td>$520</td>
</tr>
<tr>
<td>Non-member Fee</td>
<td>$350</td>
<td>$415</td>
<td>$765</td>
</tr>
</tbody>
</table>

All fees are due upon submission of your application for the CPSM examination.

Retesting fees for the Certified Professional Services Marketer examination

<table>
<thead>
<tr>
<th></th>
<th>Examination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Fee</td>
<td>$275</td>
</tr>
<tr>
<td>Non-member Fee</td>
<td>$415</td>
</tr>
</tbody>
</table>
Refunds and Transfers
There is no refund of the Application fee. If your application does not meet the eligibility requirements for CPSM candidacy, only the Examination fee will be refunded.

Candidates can reschedule their test date by contacting PSI at 800.733.9267 no later than noon, Eastern Standard Time, of the second business day PRIOR to their scheduled appointment. This is subject to the availability of appointments at PSI. There is no fee for rescheduling provided two days prior notice is given to PSI.

Please note: Canceling your examination appointment will result in a forfeiture of examination fees.

If the examination is not taken within one year of approval of application, you must submit a new application and pay Examination fee.

EXAMINATION ADMINISTRATION
The Certified Professional Services Marketer examination is administered on a daily basis, excluding holidays, at computer-based testing facilities managed by PSI. PSI has several hundred testing sites in the United States, as well as Canada. Scheduling is done on a first-come, first-serve basis. To find a testing center near you, visit [http://www.ptcny.com/cbt/sites](http://www.ptcny.com/cbt/sites) or call PSI at 800.733.9267.

Please note: Hours and days of availability vary at different centers. You will not be able to schedule your examination appointment until you have received an Eligibility Notice from PTC, via email.

Online Testing Tutorial
A Testing Software Tutorial can be viewed online. This online Testing Software Tutorial can give you an idea about the features of the testing software.


Scheduling Your Examination Appointment
After your CPSM application and fees have been received, you will be sent an Eligibility Notice by email. Print this Eligibility Notice and bring it with your current driver’s license or passport in order to gain admission to the testing center. If you do not receive an Eligibility Notice within two weeks after you have paid your examination fee, contact the Professional Testing Corporation at 212.356.0660 for a duplicate.

The Eligibility Notice will indicate how to schedule your examination appointment as well as the dates during which testing is available. Appointment times are first-come, first-serve, so schedule your appointment as soon as you receive your Eligibility Notice in order to maximize your chance of testing at your preferred location and on your preferred date. **You have one year from the date your application is approved to test.**

- It is your responsibility as the candidate to contact PSI to schedule the examination appointment.
- It is highly recommended that you become familiar with the testing site.
- Arrival at the testing site at the appointed time is the responsibility of the candidate. Please plan for weather, traffic, parking, and any security requirements that are specific to the testing location. Late arrival may prevent you from testing.
CPSM EXAMINATION INFORMATION
Development and Validation
From its inception, SMPS has been committed to offering a valid and reliable certification examination. Working under expert consultation, the SMPS Board of Directors and the Certification Committee rely on the highest standards of examination development methodology.

This methodology is designed to ensure that the resulting examination is valid and reliable. A valid examination is one that accurately reflects the knowledge and skills required for competent practice. Evidence for the validity of the CPSM examination has been gathered via two independent methods. First, a Role Delineation Survey and the resulting Test Content Outline for the examination were validated by a random sample of practicing marketers of professional services across the United States. Second, experts in the field of marketing professional services validated all questions in the examination.

Examination Development
The Certification Committee working with PTC’s psychometric staff is responsible for examination-question development, examination construction, establishment of a passing point score for the examination, and assurance that the program reflects the changing needs of the profession.

Questions appearing on the CPSM examination have been subjected to rigorous review. The Certification Committee members validate each question as relevant and important for competency in the designated areas of knowledge for marketers of professional services. The questions are also reviewed for potential bias, making sure that context, setting, terminology, and content are appropriate for all segments of the candidate population.

Examination Format
The CPSM examination consists of 150 questions that use a four-option, multiple-choice format. Each question is carefully written, referenced, and validated to determine its accuracy and correctness. There is only one answer that is MOST CORRECT for each test question. All questions are of equal weight, and it is to the candidate’s benefit to answer every examination question since there is no penalty and no points are deducted for incorrect or omitted answers to test questions. Each administration of the CPSM exam employs a combination of test questions drawn from the question bank in accordance with the Domains of Practice and the Test Content Outline (see Appendix 2). This determines the number of questions from each of the Domains of Practice that appear on the CPSM examination.

Preparation for Examination
A list of suggested reading is provided online at: http://www.smps.org/Certification/Study/
Study tools are designed to help candidates gain an understanding of the topics covered on the examination. However, candidates are responsible for keeping up to date on any relevant changes or significant developments in the field of professional services marketing. The CPSM examination is developed according to the Domains of Practice, is not based on memorization, and is not linked to specific books or reference materials. Candidates are responsible for demonstrating the knowledge defined by the Domains of Practice and should design their own preparation process, using such reference materials as they deem appropriate and necessary. Both knowledge and relevant experience are required to complete the examination successfully.
CPSM TEST ADMINISTRATION INFORMATION

Rules of the Examination

1. You must present you’re a paper copy of your Eligibility Notice and your current, government issued photo ID (such as a driver’s license or passport) at the time of your scheduled appointment. Candidates without their Eligibility Notice or without valid ID will NOT be permitted to test.

2. All electronic devices that can be used to record, transmit, receive, or play back audio, photographic, text, or video content, including but not limited to, cell phones, laptop computers, tablets, Bluetooth devices; all wearable smart gear such as smart watches and Google glasses; MP3 players such as iPods, pagers, cameras and voice recorders are not permitted to be used and cannot be taken into the examination room.

3. No papers, books or reference materials may be taken into or removed from the examination room.

4. No questions concerning content of the exam may be asked during the examination session. The candidate should read carefully the directions that are provided on screen at the beginning of the examination session.

5. Candidates are prohibited from leaving the testing room while their examination is in session, with the sole exception of going to the restroom.

Security Procedures

No individuals other than the candidates are permitted near the testing room at any time. Upon completion of their examination, candidates are required to leave the testing area immediately. Areas around the testing room will be monitored throughout the administration of the examination for security purposes.

Candidates are not permitted to leave the testing room to use a telephone while their exam is in session. Excessive requests to use the restroom and prolonged leaves of absence from the test administration room will be noted by the proctor on the test center reports submitted to PSI and SMPS.

Any candidate who gives or receives assistance from another candidate or is found to be using unauthorized materials or aids during the test administration will be required to surrender all examination materials immediately and leave the testing area. In these circumstances, the candidate’s examination will not be scored and the situation will be reported to SMPS.

SMPS reserves the right to prosecute or take any other action deemed appropriate against any individual who removes or attempts to remove examination material by any means from the test center.

Any candidate who violates security will not have his or her examination processed.
Special Accommodations
Candidates with a documented disability (physical or mental impairment) that substantially limits one or more major life activities may request special testing arrangements in writing when they submit their application. The Special Accommodations Request Form can be found at www.ptcny.com.

Candidates requesting special testing accommodations should provide, along with their written request, supporting documentation from a professional provider who possesses credentials appropriate to diagnose and treat the disability. Such documentation should include:

- the diagnosis and nature of the disability
- the date the provider last saw the candidate
- the name(s) of the diagnostic test(s) used
- the length of the condition
- testing arrangements suggested or recommended to accommodate the disability.

The written request and its accompanying documentation should be uploaded at the same time the application is submitted. There is no additional charge for special accommodations. Each request will be evaluated individually.

SMPS recognizes the definition of disability as defined by the Americans with Disabilities Act and acknowledges the provisions and protections of the act. SMPS will offer the examination in a site and manner that is deemed appropriate for candidates with disabilities. Information provided to SMPS about candidate disabilities and related testing needs is confidential.

TEST SCORING AND SCORE REPORTING
Examination-Question Analysis
The Certification Committee working with PTC will evaluate the statistical properties of the questions on the examination on an annual basis. If candidates do not perform on a given question as expected, that question will be closely evaluated to determine whether it is in any way flawed. If the content experts agree that a question is flawed, then appropriate actions will be taken.

Score Processing and Reporting
At the end of the examination, candidates will receive a printout that confirms their completion of the examination prior to leaving the testing center. Candidates will be notified in writing by Professional Testing Corporation within two to four weeks of the date of their examination whether they have officially passed or failed the examination. Scores on the major areas of the examination and on the total examination will also be reported. The passing score is determined by the Society for Marketing Professional Services. Failure to receive the report of the results should be reported to Professional Testing Corporation at (212) 356-0660.

To receive your scores without delay, be sure to notify PTC of any address changes.

Re-examination
If a candidate fails to achieve a test score equal to or greater than the minimum passing score upon his/her initial attempt, the candidate may elect to retake the exam. Submit a new application online at www.ptcny.com and pay the retesting fee.
Appeals Process

The Certification Committee is responsible for creating an appeals process that relates to rejected applications and failed examinations.

Candidates wishing to challenge a denial of eligibility to sit for the examination or a failing test score on the certification examination may submit a written appeal to the Certification Committee. The candidate must make the appeal in writing.

To initiate an appeal, the candidate must submit a letter to SMPS Headquarters, Attn: Certification Department, within 30 days after receiving notice, stating the conditions of the appeal. The committee shall respond to the candidate within 60 days of receipt of an appeal. Candidates not certified after appeal may elect to retake the examination by submitting a new application and paying the retesting fee.

CPSM CERTIFICATION AND RECERTIFICATION

Recognition of Certification

Candidates who pass the examination will be entitled to use the CPSM designation after their name. Each candidate will be given a certificate of achievement, a lapel pin, and will be invited to attend a special recognition ceremony at the SMPS Conference. Upon request, SMPS will notify the candidate’s firm principal/employer of the candidate’s outstanding accomplishment.

Recertification

The CPSM designation is valid for a three year period. To maintain certification, the candidate must accumulate a minimum of 50 continuing education units (CEUs) within each subsequent three year period. CEUs for recertification may be accumulated in a variety of ways, through SMPS or other related professional associations.

Failure to accumulate the minimum 50 CEUs, submitting a recertification application and recertification fees will result in revocation of the CPSM designation.

Following are the guidelines for calculating CEUs: One CEU is awarded for each contact hour of instruction. A contact hour is defined as one hour of interaction between a learner and an instructor. For purposes of calculating CEUs, breaks, meals, or social/networking time cannot be included in the contact time. A presentation during a meal function can be counted for the length of the presentation only. Meeting time devoted to business or committee activities cannot be counted. CEUs will be maintained in an SMPS database for three recertification cycles. For more information on how to earn CEUs toward recertification, call the SMPS Certification Department at 800.292.7677, x232.

Life Certification

Certified Professional Services Marketers who maintain their certification throughout their careers will be certified for life upon reaching the age of 65. No further reporting is necessary except for notifying the SMPS certification administrator of meeting the age requirement.
GENERAL POLICIES

Release of Information
SMPS will release CPSM status verification, but not scores, upon request. Requests should be directed to the CPSM Certification Program at the SMPS Headquarters. SMPS will maintain a current listing of Certified Professional Services Marketers.

Nondiscrimination
SMPS endorse the principles of equal opportunity. Eligibility criteria for examination and certification under the CPSM program are applied equally to all applicants regardless of race, sex, age, religion, national origin, sexual orientation, or disability.
APPENDIX 1: Code of Ethics

As a Certified Professional Services Marketer (CPSM), it is SMPS’s intention that you will aspire to adhere to a Code of Ethics. It recognizes your integrity and obligation to maintain high standards of individual professional behavior, as well as your responsibility to promote these same standards within our industry.

As a Certified Professional Services Marketer:

I will maintain and advance my knowledge of professional services marketing, respect the body of marketing knowledge, and contribute to its growth.

I promise to continually seek to raise the standards of excellence in professional services marketing.

I pledge to pursue my professional activities with honesty and fairness, to demonstrate the highest standard of personal conduct, to actively encourage the highest level of ethical standards within the profession, and to report unethical behavior to the Society for Marketing Professional Services.

I promise to practice in a manner that supports the rights of employers, employees, and clients and will not discriminate because of race, sex, age, religion, national origin, sexual orientation, or disability.

I recognize my responsibility to uphold all laws and regulations relating to my firm’s policies and activities.

I promise to be loyal to the firm that employs me and pursue its objectives in ways that are consistent with the public interest.
APPENDIX 2: Content Outline

The Content Outline for the CPSM examination was developed using the results of a role delineation survey conducted by SMPS in cooperation with Professional Testing Corporation. This Content Outline lists the percentage of questions on the test that assess knowledge associated with performance of each of the practice domains. Under each domain, there is a sample listing of the areas of knowledge that a marketer must possess in order to demonstrate the skills under that domain. Each domain is listed with a descriptive set of skills associated with that domain. For example, questions on Marketing Research may relate to such skills as establishing methodologies for collecting and evaluating information or monitoring sources of industry-related market information. Preparation for the examination should be focused on both domains/skills and knowledge requirements to demonstrate those skills.

DOMAIN 1: MARKETING RESEARCH - 13%

**Knowledge Areas**
- Research Design
- Data-Gathering Techniques
- Data Analysis Techniques
- Marketing Audit Components
- Market Research Techniques
- Federal, State, and Local Laws and Regulations
- Federal, State, and Local Forms and Guidelines
- Federal, State, and Local Business Classifications
- Technical and Industry Terminology
- Training Methods

**Skill Sets**
- Monitor social, demographic, cultural, and economic trends
- Monitor industry-related market information
- Read publications relevant to a target market
- Forecast trends
- Set up methodologies for collecting and evaluating information
- Maintain a network of contacts to keep abreast of relevant markets and trends
- Design research studies
- Evaluate research studies
- Analyze research results
- Document research results
- Participate in market research activities
- Monitor federal, state, and local regulatory matters
- Read marketing reference materials
- Gather data using interviews
- Gather data using surveys
- Gather data using focus groups
## Domain 2: Marketing Planning - 18%

**Knowledge Areas**
- Research Design
- Data-Gathering Techniques
- Data Analysis Techniques
- Strategic Plan Components
- Business Plan Components
- Marketing Audit Components
- Marketing Planning Techniques
- Market Research Techniques
- Basic Accounting Principles
- Budgeting
- Basic Management Principles
- Written Communication
- Verbal Communication
- Contact Management Databases
- Federal, State, and Local Laws and Regulations
- Federal, State, and Local Forms and Guidelines
- Technical and Industry Terminology
- Copyright Laws
- Contract Components
- Negotiation Techniques
- Personnel Management
- Training Methods
- Motivational Techniques
- Group Dynamics
- Team-Building Principles
- Advertising Media
- Business Etiquette and Protocol
- Organizational Structure

**Skill Sets**
- Analyze data of relevant industries and competitors
- Analyze relevant historical and contemporary data
- Analyze market data
- Interpret market research results
- Conduct a SWOT analysis
- Collect industry marketing cost data
- Participate in strategic planning
- Develop a vision statement
- Develop goals and objectives
- Facilitate the planning process
- Select target markets
- Create a marketing plan
- Create a marketing budget
- Set marketing goals
- Manage implementation of a marketing plan
- Manage the marketing budget
- Estimate the impact of marketing on the bottom line
- Estimate return on investment of the marketing plan
- Conduct a cost/benefit analysis
- Provide a progress report on the marketing plan
- Revise the marketing plan
DOMAIN 3: CLIENT AND BUSINESS DEVELOPMENT - 20%

**Knowledge Areas**
- Research Design
- Data-Gathering Techniques
- Data Analysis Techniques
- Business Plan Components
- Market Research Techniques
- Budgeting
- Basic Management Principles
- Written Communication
- Verbal Communication
- Contact Management Databases
- Federal, State, and Local Laws and Regulations
- Federal, State, and Local Forms and Guidelines
- Federal, State, and Local Business Classifications
- Technical and Industry Terminology
- Publishing Software
- Presentation Software
- Contract Components
- Negotiation Techniques
- Consultant Management
- Personnel Management
- Training Methods
- Motivational Techniques
- Group Dynamics
- Team-Building Principles
- Business Etiquette and Protocol
- Organizational Structure

**Skill Sets**
- Create business development strategies
- Research prospective client industries
- Pre-qualify a client
- Pre-qualify a project
- Build a relationship with prospective clients
- Maintain contact databases
- Maintain a relationship with past clients
- Measure client satisfaction
- Address issues from a client satisfaction survey
- Participate in client business development activities
- Develop client-specific business development plans
- Develop project-pursuit or capture plans
- Conduct client perception studies
DOMAIN 4: PROPOSALS - 18%

Knowledge Areas
Research Design
Data-Gathering Techniques
Data Analysis Techniques
Market Research Techniques
Basic Accounting Principles
Budgeting
Basic Management Principles
Written Communication
Verbal Communication
Contact Management Databases
Federal, State, and Local Laws and Regulations
Federal, State, and Local Forms and Guidelines
Federal, State, and Local Business Classifications
Technical and Industry Terminology
Graphic Design and Production
Publishing Software
Presentation Software
Copyright Laws
Contract Components
Negotiation Techniques
Consultant Management
Personnel Management
Training Methods
Motivational Techniques
Group Dynamics
Team-Building Principles
Photography Techniques
Special Events Planning
Business Etiquette and Protocol
Organizational Structure

Skill Sets
Conduct an RFQ/RFP strategy session
Participate in an RFQ/RFP strategy session
Determine the firm’s capability to perform the requested project
Make a go/no-go decision
Complete government forms
Identify firms for teaming/partnering
Determine the value of the project to the firm
Determine the fee structure
Determine the history and culture of the project/building site
Draft a proposal
Oversee production of a proposal
Draft a letter of intent
Develop a presentation of a proposal
Prepare proposal presentation materials
Identify presentation personnel
Identify presentation meeting space and equipment needs
Use desktop publishing software
Identify client hot buttons
Identify affirmative action and M/WBE opportunities
Arrange for audio/visual aids
Conduct a presentation rehearsal
Present a presentation
Perform contract negotiations
Draft a contract
Sign a contract
Develop a schedule for tracking proposal elements
Develop a system for tracking proposal elements
Conduct a post-award debriefing regardless of outcome
Develop a proposal QA/QC process
Develop a proposal close-out process
### Knowledge Areas

- Research Design
- Data-Gathering Techniques
- Data Analysis Techniques
- Strategic Plan Components
- Business Plan Components
- Marketing Audit Components
- Marketing Planning Techniques
- Market Research Techniques
- Basic Accounting Principles
- Budgeting
- Basic Management Principles
- Written Communication
- Verbal Communication Skills
- Contact Management Databases
- Federal, State, and Local Business Classifications
- Technical and Industry Terminology
- Graphic Design and Production
- Publishing Software
- Presentation Software
- Copyright Laws
- Contract Components
- Negotiation Techniques
- Consultant Management
- Training Methods
- Motivational Techniques
- Group Dynamics
- Photography Techniques
- Special Events Planning
- Trade Show Management
- Advertising Media
- Business Etiquette and Protocol

### Skill Sets

- Develop corporate identity
- Develop a unique value proposition
- Plan trade show activities
- Maintain a press list
- Develop a communications plan
- Develop a social media plan
- Maintain a web presence
- Manage expenditures consistent with the budget
- Develop an advertising plan
- Place advertisements
- Develop corporate entertainment strategies
- Represent the firm at external events
- Draft press releases
- Draft newsletter or journal articles
- Create electronic promotional materials
- Create video promotional materials
- Coordinate photography
- Interview vendors and consultants
- Select vendors and consultants
- Manage and direct activities of consultants
- Prepare award competition entries
- Coordinate firm special events
- Train staff to interact with media
DOMAIN 6: MANAGEMENT - 18%

**Knowledge Areas**
- Data-Gathering Techniques
- Data Analysis Techniques
- Marketing Audit Components
- Basic Accounting Principles
- Basic Management Principles
- Written Communication
- Verbal Communication
- Contact Management Databases
- Technical and Industry Terminology
- Contract Components
- Negotiation Techniques
- Consultant Management
- Personnel Management
- Training Methods
- Motivational Techniques
- Group Dynamics
- Team-Building Principles
- Business Etiquette and Protocol
- Organizational Structure

**Skill Sets**
- Supervise marketing and support staff
- Communicate across departments and/or branch offices
- Develop information management systems
- Develop an internal communications program
- Conduct marketing training sessions
- Conduct marketing and BD training for technical staff
- Attend professional development activities
- Develop marketing incentive systems
- Recruit personnel
- Evaluate the production process to improve efficiency
- Comply with business and accounting principles
- Select a customer relationship management (CRM) system
- Maintain a customer relationship management (CRM) system
- Promote a firmwide business development culture
APPENDIX 3: Test-Taking Suggestions

- Answer the questions in order, but don’t waste time on questions containing unfamiliar or difficult material. You can come back to them, time permitting.

- Read each question stem (i.e., the first part of the question) carefully and think about the possible right answer before looking at the four options.

- Do NOT read more into the question than is stated. Pay attention to the information contained in the question.

- Be sure to pay attention to qualifiers or key words such as not, least, first, best, except, and most. These words have a strong impact on the interpretation of the question and the correct response.

- If you do not know the answer to a question, look at each option and try to eliminate wrong choices. Then select the best answer from the choices remaining.

- Make educated guesses at the correct answers rather than leaving the answer spaces blank. There is no penalty for guessing. Be sure to answer all questions.

- There are NO trick questions.