

THE DOMAINS
OF PRACTICE FOR

**PROFESSIONAL
SERVICES
MARKETING**

SMPS

Society for Marketing
Professional Services

THE DOMAINS OF PRACTICE FOR PROFESSIONAL SERVICES MARKETING

The Society for Marketing Professional Services (SMPS) is the only marketing association offering A/E/C professionals the network, knowledge, and training to build business.

In 1997 and again in 2013, working with the Professional Testing Corporation, SMPS analyzed the practice of professional services marketing to articulate and confirm the body of knowledge and skills most critical to competency. The resulting knowledge areas and skill sets are classified under the six Domains of Practice for Professional Services Marketing, outlined on the following pages.

Put the Domains to Work for You and Your Firm

On pages 3–13, the Domains of Practice for Professional Services Marketing are presented as sets of rows and columns. The rows represent skill sets, and the columns represent knowledge areas.

You can use this document to advance your career and build your business.

1. Plan for career advancement.

Review the knowledge areas and skill sets in each domain to self-evaluate your level of mastery. Then, pursue professional development opportunities in areas in which you need to develop your skills. Discuss and document your goals, plans, and progress with your supervisor or management team.

A time-tested path to career advancement is certification. SMPS certifies A/E/C marketers and business developers through its Certified Professional Services Marketer (CPSM) Program. To earn the CPSM designation, candidates must meet educational and experience requirements, pass a rigorous written examination, and pledge to abide by the CPSM Code of Ethics. Successful candidates are recognized as having the knowledge and skills to generate profitable business in the A/E/C marketplace. These Domains of Practice are the foundation of the CPSM program.

To help candidates prepare for the exam, SMPS and its chapters offer educational programs, study groups, and publications. Learn more at www.smeps.org/certification or call SMPS Headquarters at 800.292.7677, x232.

2. Audit your firm's marketing and business development program.

The final column in each domain matrix is labeled "Marketing Audit." Use this column to evaluate the skill sets in each domain as marketing activities. Which of these activities are included in your firm's marketing and business development program? Review this document with your marketing and/or management team to determine where you can expand or strengthen your efforts.

SMPS provides professional development, publications, tools, and an annual conference to support effective marketing and business development practices in A/E/C firms. To learn more, please contact SMPS Headquarters at 800.292.7677 or visit www.smeps.org.



DOMAIN 1

MARKETING RESEARCH

Skill Sets		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	Marketing Audit: Included in our firm's program
1	Monitor social, demographic, cultural, and economic trends		X	X		X						<input type="checkbox"/>
2	Monitor industry-related market information		X	X		X						<input type="checkbox"/>
3	Read publications relevant to a target market		X			X						<input type="checkbox"/>
4	Forecast trends			X		X						<input type="checkbox"/>
5	Set up methodologies for collecting and evaluating information	X	X	X								<input type="checkbox"/>
6	Maintain a network of contacts to keep abreast of relevant markets and trends					X						<input type="checkbox"/>
7	Design research studies	X										<input type="checkbox"/>
8	Evaluate research studies			X	X							<input type="checkbox"/>
9	Analyze research results			X	X							<input type="checkbox"/>
10	Document research results					X						<input type="checkbox"/>
11	Participate in market research activities		X			X						<input type="checkbox"/>
12	Monitor federal, state, and local regulatory matters						X	X	X			<input type="checkbox"/>
13	Read marketing reference materials		X	X		X				X	X	<input type="checkbox"/>
14	Gather data using interviews		X			X						<input type="checkbox"/>
15	Gather data using surveys		X			X						<input type="checkbox"/>
16	Gather data using focus groups		X			X						<input type="checkbox"/>

	Verbal Communication	Contact Management Databases	Federal, State, and Local Laws and Regulations	Federal, State, and Local Forms and Guidelines	Technical and Industry Terminology	Graphic Design and Production	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	Marketing Audit: Included in our firm's program
17																		<input type="checkbox"/>
18																		<input type="checkbox"/>
19																		<input type="checkbox"/>
20																		<input type="checkbox"/>
21																		<input type="checkbox"/>
22																		<input type="checkbox"/>
23																		<input type="checkbox"/>
24																		<input type="checkbox"/>
25																		<input type="checkbox"/>
26																		<input type="checkbox"/>
27																		<input type="checkbox"/>
28																		<input type="checkbox"/>
29																		<input type="checkbox"/>
30	X	X								X		X	X	X	X	X	X	<input type="checkbox"/>
31	X	X			X	X		X	X	X	X	X	X	X	X	X	X	<input type="checkbox"/>
32	X									X	X	X	X	X		X	X	<input type="checkbox"/>
33					X	X	X	X	X	X					X	X		<input type="checkbox"/>
34					X	X	X	X	X	X					X	X	X	<input type="checkbox"/>
35																		<input type="checkbox"/>
36	X									X								<input type="checkbox"/>
37			X	X	X								X				X	<input type="checkbox"/>



DOMAIN 3

CLIENT AND BUSINESS DEVELOPMENT

Skill Sets		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
38	Create business development strategies		X	X	X	X	X					X	X
39	Research prospective client industries		X	X		X			X	X	X		
40	Pre-qualify a client		X	X		X			X	X	X		
41	Pre-qualify a project		X	X		X			X	X		X	X
42	Build a relationship with prospective clients		X	X				X	X	X			
43	Maintain contact databases								X		X		
44	Maintain a relationship with past clients		X	X				X	X	X			
45	Measure client satisfaction		X	X					X	X			
46	Address issues from a client satisfaction survey			X				X		X			
47	Participate in client business development activities			X	X	X			X	X	X		
48	Develop client-specific business development plans	X	X	X			X	X	X		X		
49	Develop project-pursuit or capture plans		X	X				X	X			X	
50	Conduct client perception studies	X	X	X					X	X			



These Domains of Practice form the foundation of SMPS's certification program. When you earn the Certified Professional Services Marketer (CPSM) designation from SMPS, you position yourself among your peers as an expert committed to the highest standards of professional excellence. Further, the designation differentiates you from other professionals, benefitting your employer and your career. Learn more about the benefits of becoming a CPSM at www.smps.org/Certification.

	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	Marketing Audit: Included in our firm's program
38													X		<input type="checkbox"/>
39		X													<input type="checkbox"/>
40		X			X								X		<input type="checkbox"/>
41	X	X								X	X	X			<input type="checkbox"/>
42		X		X									X		<input type="checkbox"/>
43															<input type="checkbox"/>
44		X											X		<input type="checkbox"/>
45															<input type="checkbox"/>
46		X				X	X	X	X	X	X	X			<input type="checkbox"/>
47		X		X	X	X									<input type="checkbox"/>
48		X											X	X	<input type="checkbox"/>
49		X													<input type="checkbox"/>
50		X	X	X											<input type="checkbox"/>



DOMAIN 4

PROPOSALS

Skill Sets

		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
51	Conduct an RFQ/RFP strategy session		X	X				X	X	X		
52	Participate in an RFQ/RFP strategy session							X		X		
53	Determine the firm's capability to perform the requested project											X
54	Make a go/no-go decision							X			X	
55	Complete government forms								X		X	X
56	Identify firms for teaming/partnering	X		X				X	X	X	X	
57	Determine the value of the project to the firm					X	X	X				
58	Determine the fee structure					X	X	X				
59	Determine the history and culture of the project/building site	X	X	X	X							
60	Draft a proposal								X			X
61	Oversee production of a proposal							X	X	X		
62	Draft a letter of intent								X			X
63	Develop a presentation of a proposal									X		
64	Prepare proposal presentation materials								X	X		
65	Identify presentation personnel											
66	Identify presentation meeting space and equipment needs											
67	Use desktop publishing software											
68	Identify client hot buttons		X	X								
69	Identify affirmative action and M/WBE opportunities											X
70	Arrange for audio/visual aids											
71	Conduct a presentation rehearsal									X		
72	Present a presentation									X		
73	Perform contract negotiations						X		X			
74	Draft a contract						X		X			X
75	Sign a contract											
76	Develop a schedule for tracking proposal elements							X	X	X		
77	Develop a system for tracking proposal elements							X	X	X		
78	Conduct a post-award debriefing regardless of outcome	X	X	X	X				X	X		
79	Develop a proposal QA/QC process							X	X			
80	Develop a proposal close-out process							X	X	X		

	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	Marketing Audit: Included in our firm's program
51			X		X	X			X	X	X		X	X	X			X	X	<input type="checkbox"/>
52			X										X	X	X			X	X	<input type="checkbox"/>
53			X					X												<input type="checkbox"/>
54			X					X			X			X						<input type="checkbox"/>
55			X							X					X					<input type="checkbox"/>
56			X											X				X	X	<input type="checkbox"/>
57			X					X	X	X	X							X	X	<input type="checkbox"/>
58			X					X	X	X	X							X	X	<input type="checkbox"/>
59																				<input type="checkbox"/>
60	X	X	X	X	X		X						X			X				<input type="checkbox"/>
61			X	X			X				X			X	X	X				<input type="checkbox"/>
62	X	X	X	X	X		X													<input type="checkbox"/>
63			X	X	X	X	X									X				<input type="checkbox"/>
64			X	X	X	X	X									X				<input type="checkbox"/>
65											X			X	X					<input type="checkbox"/>
66						X											X			<input type="checkbox"/>
67					X															<input type="checkbox"/>
68																				<input type="checkbox"/>
69	X	X																		<input type="checkbox"/>
70																	X			<input type="checkbox"/>
71			X								X	X	X	X	X					<input type="checkbox"/>
72			X																	<input type="checkbox"/>
73								X	X	X	X		X							<input type="checkbox"/>
74	X	X						X		X	X									<input type="checkbox"/>
75								X												<input type="checkbox"/>
76				X	X						X			X	X	X				<input type="checkbox"/>
77				X	X	X					X					X			X	<input type="checkbox"/>
78																				<input type="checkbox"/>
79											X		X	X	X					<input type="checkbox"/>
80											X		X	X	X					<input type="checkbox"/>

	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	Marketing Audit: Included in our firm's program
81	X				X	X	X													<input type="checkbox"/>
82	X		X																	<input type="checkbox"/>
83																	X	X	X	<input type="checkbox"/>
84		X																		<input type="checkbox"/>
85				X				X							X					<input type="checkbox"/>
86				X				X							X					<input type="checkbox"/>
87					X	X		X							X					<input type="checkbox"/>
88																X	X	X		<input type="checkbox"/>
89																	X	X		<input type="checkbox"/>
90																	X	X		<input type="checkbox"/>
91																X	X		X	<input type="checkbox"/>
92	X													X					X	<input type="checkbox"/>
93				X																<input type="checkbox"/>
94				X																<input type="checkbox"/>
95					X		X	X												<input type="checkbox"/>
96					X		X	X	X		X				X					<input type="checkbox"/>
97									X	X	X				X					<input type="checkbox"/>
98									X	X	X									<input type="checkbox"/>
99									X	X	X									<input type="checkbox"/>
100	X										X									<input type="checkbox"/>
101				X	X	X	X	X												<input type="checkbox"/>
102	X								X	X						X			X	<input type="checkbox"/>
103	X			X								X	X						X	<input type="checkbox"/>



DOMAIN 6

MANAGEMENT

Skill Sets		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	
104	Supervise marketing and support staff													
105	Communicate across departments and/or branch offices						X	X						
106	Develop information management systems		X						X					
107	Develop an internal communications program						X			X				
108	Conduct marketing training sessions						X	X		X				
109	Conduct marketing and BD training for technical staff						X	X		X				
110	Attend professional development activities	X				X								
111	Develop marketing incentive systems													
112	Recruit personnel													
113	Evaluate the production process to improve efficiency			X		X								
114	Comply with business and accounting principles				X	X								
115	Select a customer relationship management (CRM) system								X		X	X	X	
116	Maintain a customer relationship management (CRM) system								X					
117	Promote a firmwide business development culture						X	X						

Want to improve the effectiveness of your marketing and business development? Visit www.smeps.org to learn about the networking, professional development, publications, and tools available to you through SMPS and its chapters. The only marketing association dedicated to the A/E/C industry, SMPS can help you build your business and advance your career.

	Personnel Management	Training Methods	Motivational Techniques	Group Dynamics	Team-Building Principles	Business Etiquette and Protocol	Organizational Structure	Marketing Audit: Included in our firm's program
104	X	X	X	X	X			<input type="checkbox"/>
105				X		X	X	<input type="checkbox"/>
106							X	<input type="checkbox"/>
107						X	X	<input type="checkbox"/>
108		X	X	X				<input type="checkbox"/>
109		X	X	X		X	X	<input type="checkbox"/>
110								<input type="checkbox"/>
111			X	X				<input type="checkbox"/>
112	X		X	X	X			<input type="checkbox"/>
113								<input type="checkbox"/>
114								<input type="checkbox"/>
115								<input type="checkbox"/>
116							X	<input type="checkbox"/>
117		X	X	X	X			<input type="checkbox"/>

SELF-ASSESSMENT OF KNOWLEDGE AREAS

This matrix will help you evaluate your mastery of all the knowledge areas critical to practicing each of the six domains, identifying areas where you are strong or need improvement.

Follow this scale to score your responses:

- 1 No understanding or experience
- 2 Some understanding or experience
- 3 Working understanding or experience
- 4 Strong understanding or experience
- 5 Mastery understanding or experience

Once you have completed the ratings for Present Level and Needed Level, subtract the Present Level from the Needed Level to determine your level of competency for that knowledge area. You can set your professional development goals by focusing on the areas where you have the highest score differences.

Knowledge Area	Recommended for Skills	Present Level (circle one)	Needed Level (circle one)	Score
Research Design	5, 7, 32, 34, 35, 48, 50, 56, 59, 78, 81, 82, 85, 86	1 2 3 4 5	1 2 3 4 5	
Data-Gathering Techniques	1, 2, 3, 5, 11, 13, 14, 15, 16, 31, 33, 34, 37, 38, 39, 40, 41, 42, 44, 45, 48, 49, 50, 51, 59, 68, 78, 81, 82, 85, 86, 110	1 2 3 4 5	1 2 3 4 5	
Data Analysis Techniques	1, 2, 4, 5, 8, 9, 13, 17, 18, 19, 27, 30, 31, 33, 34, 36, 37, 38, 39, 40, 41, 42, 44, 45, 46, 47, 48, 49, 50, 51, 56, 59, 68, 78, 81, 82, 85, 86, 106	1 2 3 4 5	1 2 3 4 5	
Strategic Plan Components	21, 23, 24, 25, 26, 28, 30, 31, 33, 34, 37, 81, 85, 86	1 2 3 4 5	1 2 3 4 5	
Business Plan Components	21, 23, 24, 25, 26, 30, 31, 33, 34, 37, 38, 47, 81, 85, 86	1 2 3 4 5	1 2 3 4 5	
Marketing Audit Components	8, 9, 20, 30, 31, 33, 34, 37, 81, 82, 85, 86, 113	1 2 3 4 5	1 2 3 4 5	
Marketing Planning Techniques	20, 25, 26, 27, 28, 29, 30, 31, 34, 37, 81, 82, 85, 86, 89, 91	1 2 3 4 5	1 2 3 4 5	
Market Research Techniques	1, 2, 3, 4, 6, 10, 11, 13, 14, 15, 16, 17, 18, 19, 20, 27, 31, 33, 34, 37, 38, 39, 40, 41, 47, 59, 78, 81, 82, 85, 86	1 2 3 4 5	1 2 3 4 5	
Basic Accounting Principles	31, 32, 33, 34, 35, 37, 57, 58, 88, 114	1 2 3 4 5	1 2 3 4 5	
Budgeting	22, 29, 30, 31, 32, 33, 34, 35, 37, 38, 48, 57, 58, 73, 74, 88, 97, 102	1 2 3 4 5	1 2 3 4 5	
Basic Management Principles	22, 29, 30, 31, 32, 33, 34, 35, 37, 42, 44, 46, 48, 49, 51, 52, 54, 56, 57, 58, 61, 76, 77, 79, 80, 88, 92, 100, 102, 110, 113, 114	1 2 3 4 5	1 2 3 4 5	
Written Communication	23, 26, 30, 31, 32, 36, 37, 39, 40, 41, 42, 43, 44, 45, 47, 48, 49, 50, 51, 55, 56, 60, 61, 62, 64, 73, 74, 76, 77, 78, 79, 80, 81, 82, 85, 86, 87, 93, 94, 100, 101, 102, 105, 107, 108, 109, 117	1 2 3 4 5	1 2 3 4 5	

Knowledge Area	Recommended for Skills	Present Level (circle one)	Needed Level (circle one)	Score
Verbal Communication	30, 31, 32, 36, 39, 40, 41, 42, 44, 45, 46, 47, 50, 51, 52, 56, 61, 63, 64, 71, 72, 76, 77, 78, 80, 81, 82, 92, 100, 102, 103, 105, 108, 109, 117	1 2 3 4 5	1 2 3 4 5	
Contact Management Databases	30, 31, 39, 40, 43, 47, 48, 54, 55, 56, 84, 106, 115, 116	1 2 3 4 5	1 2 3 4 5	
Federal, State, and Local Laws and Regulations	12, 37, 38, 41, 49, 53, 55, 60, 62, 69, 74	1 2 3 4 5	1 2 3 4 5	
Federal, State, and Local Forms and Guidelines	12, 37, 38, 41, 60, 62, 69, 74	1 2 3 4 5	1 2 3 4 5	
Federal, State, and Local Business Classifications	12, 41, 60, 62, 69, 74, 82	1 2 3 4 5	1 2 3 4 5	
Technical and Industry Terminology	13, 31, 33, 34, 37, 39, 40, 41, 42, 44, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 60, 61, 62, 63, 64, 71, 72, 85, 86, 93, 94, 101, 103, 107, 108, 109	1 2 3 4 5	1 2 3 4 5	
Graphic Design and Production	31, 33, 34, 60, 61, 62, 63, 64, 76, 77, 81, 87, 95, 96, 101	1 2 3 4 5	1 2 3 4 5	
Publishing Software	50, 51, 60, 62, 63, 64, 67, 76, 77, 81, 87, 101	1 2 3 4 5	1 2 3 4 5	
Presentation Software	42, 47, 50, 51, 63, 64, 66, 77, 81, 95, 96, 101	1 2 3 4 5	1 2 3 4 5	
Copyright Laws	33, 34, 60, 61, 62, 63, 64, 85, 86, 87, 95, 96, 101	1 2 3 4 5	1 2 3 4 5	
Contract Components	31, 33, 34, 40, 47, 53, 54, 57, 58, 73, 74, 75, 96, 97, 98, 99, 102, 115	1 2 3 4 5	1 2 3 4 5	
Negotiation Techniques	31, 33, 34, 46, 47, 51, 57, 58, 73, 97, 98, 99, 102, 115	1 2 3 4 5	1 2 3 4 5	
Consultant Management	46, 51, 55, 57, 58, 73, 74, 96, 97, 98, 99, 100, 115	1 2 3 4 5	1 2 3 4 5	
Personnel Management	30, 31, 32, 33, 34, 36, 46, 51, 54, 57, 58, 61, 65, 71, 73, 74, 76, 77, 79, 80, 104, 112	1 2 3 4 5	1 2 3 4 5	
Training Methods	13, 31, 32, 46, 71, 103, 104, 108, 109, 117	1 2 3 4 5	1 2 3 4 5	
Motivational Techniques	30, 31, 32, 41, 46, 51, 52, 60, 71, 73, 79, 80, 103, 104, 108, 109, 111, 112, 117	1 2 3 4 5	1 2 3 4 5	
Group Dynamics	30, 31, 32, 37, 41, 46, 51, 52, 54, 56, 61, 65, 71, 76, 79, 80, 92, 104, 105, 108, 109, 111, 112, 117	1 2 3 4 5	1 2 3 4 5	
Team-Building Principles	30, 31, 32, 41, 46, 51, 52, 55, 61, 65, 71, 76, 79, 80, 104, 112, 117	1 2 3 4 5	1 2 3 4 5	
Photography Techniques	60, 61, 63, 64, 76, 77, 85, 86, 87, 96, 97	1 2 3 4 5	1 2 3 4 5	
Special Events Planning	66, 70, 88, 91, 102	1 2 3 4 5	1 2 3 4 5	
Trade Show Management	83, 88, 91, 89, 90	1 2 3 4 5	1 2 3 4 5	
Advertising Media	30, 31, 33, 34, 83, 88, 89, 90	1 2 3 4 5	1 2 3 4 5	
Business Etiquette and Protocol	30, 31, 32, 33, 34, 38, 40, 42, 44, 48, 51, 52, 56, 57, 58, 83, 91, 92, 102, 103, 105, 107, 109	1 2 3 4 5	1 2 3 4 5	
Organizational Structure	57, 58, 77, 105, 106, 107, 109, 116	1 2 3 4 5	1 2 3 4 5	

ABOUT SMPS

The only marketing association dedicated to the A/E/C industry, the Society for Marketing Professional Services (SMPS) was created in 1973 by a group of firm leaders who recognized the need to sharpen skills, pool resources, and work together to build their businesses.

Today, SMPS represents a dynamic network of 6,000+ marketing and business development professionals working to secure profitable business relationships for architectural, engineering, planning, interior design, construction, and specialty consulting firms in the United States and Canada. The Society and its chapters benefit from the support of 3,700 A/E/C firms, encompassing 80% of the *Engineering News-Record* Top 500 Design Firms and Top 400 Contractors. Companies can tap into SMPS's powerful network to form teams, secure business referrals and intelligence, and benchmark performance.

SMPS's mission is to advocate for, educate, and connect leaders in the building industry.

Learn more at www.smeps.org.



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