

## THE DOMAINS OF PRACTICE FOR PROFESSIONAL SERVICES MARKETING

The Domains of Practice form the foundation of SMPS's certification program. When you earn the Certified Professional Services Marketer (CPSM) designation, you position yourself as an expert committed to the highest standards of professional excellence. The designation differentiates you from other professionals, benefits your firm, and prepares you with leadership skills to take your career to the next level.

Recently, SMPS analyzed the practice of professional services marketers and business developers to confirm the body of knowledge and skills most critical for competency. These knowledge areas and skill sets were then classified under six Domains of Practice for Professional Services Marketing.

**START** To become a CPSM, you must prove proficiency in these six Domains of Practice:

### 1 MARKETING RESEARCH

Marketing research is executed to gather, record, and analyze data related to marketing a firm's services. The data can be used to identify and define marketing opportunities; generate, refine, and evaluate marketing actions; monitor marketing performance; and forecast trends.

### 2 MARKETING PLANNING

The marketing plan serves as a map to define a firm's market prospects and key market characteristics. The plan should include marketing goals and strategies to ensure successful direction to the team, as well as information on how marketing budgets and efforts should be spent.

### 3 CLIENT AND BUSINESS DEVELOPMENT

Business development involves relationship building with current and prospective clients, often prior to a request for proposal. Through interaction with the client, development activities may include calls, visits, correspondence, social media, referrals, and tradeshows.

### 4 PROPOSALS

Proposals are prepared in response to a specific solicitation where the project and scope of work are identified. Proposals can include general firm information, relevant projects, a technical project approach, and key staff résumés.

### 5 PROMOTIONAL ACTIVITY

This undertaking includes all forms of communications and inbound/outbound marketing. Some examples include advertising, direct mail, web site, social media, brochures, presentations, special events, public relations, and press releases.

### 6 MANAGEMENT

Management involves coordinating the efforts of staff and/or consultants to accomplish marketing goals and objectives. Using available resources, management effectively plans, organizes, staffs, and directs projects of an organization or firm.

## 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 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](http://www.smeps.org).



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## QUICK REFERENCE GUIDE

The Society for Marketing Professional Services (SMPS) gives you the knowledge, insights, network, and tools you need for success. **Sharpen your competitive advantage through SMPS's certification program.**



PUT THE DOMAINS TO WORK FOR YOU AND YOUR FIRM

# THE DOMAINS OF PRACTICE FOR PROFESSIONAL SERVICES MARKETING

## DOMAINS OF PRACTICE SKILL SET CHECKLIST

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.



### MARKETING RESEARCH

- 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/Evaluate research studies
- Analyze/Document research results
- Participate in market research activities
- Monitor federal, state, and local regulatory matters
- Read marketing reference materials
- Gather data using interviews, surveys and focus groups



### MARKETING PLANNING

- 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, goals and objectives
- Facilitate the planning process
- Select target markets
- Create a marketing plan/budget
- Set marketing goals
- Manage implementation of a marketing plan/budget
- Estimate the impact of marketing on the bottom line and the return on investment
- Conduct a cost/benefit analysis
- Provide a progress report on the marketing plan
- Revise the marketing plan



### CLIENT AND BUSINESS DEVELOPMENT

- Create business development strategies
- Research prospective client industries
- Pre-qualify a client/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



### PROPOSALS

- Conduct and 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, 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/Sign a contract
- Develop a system/schedule for tracking proposal elements
- Conduct a post-award debriefing regardless of outcome
- Develop a proposal QA/QC process
- Develop a proposal close-out process



### PROMOTIONAL ACTIVITY

- Develop corporate identity
- Develop a unique value proposition
- Plan trade show activities
- Maintain a press list
- Develop a communications/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/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



### MANAGEMENT

- 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