



CERTIFIED  
PROFESSIONAL  
SERVICES  
MARKETER

AN SMPS CERTIFICATION PROGRAM

**Certified Professional Services Marketer  
Examination**

**Handbook for Candidates**



PROFESSIONAL TESTING CORPORATION® 1350 BROADWAY • SUITE 800 • NEW YORK, NY 10018

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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.smeps.org](http://www.smeps.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](mailto:ptcny@ptcny.com).

Test construction and administration services for the CPSM examination are provided by:

Professional Testing Corporation (PTC)  
1350 Broadway, Suite 800  
New York, NY 10018  
Web Site: [www.ptcnyc.com](http://www.ptcnyc.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 website <http://ptcnyc.com/test-sponsors/smps/>.
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

	Application	Examination	Total
Member Fee	\$245	\$275	\$520
Non-member Fee	\$350	\$415	\$765

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

Retesting/Rescheduling fees for the Certified Professional Services Marketer examination

	Examination
Member Fee	\$275
Non-member Fee	\$415

## ***Refunds and Transfers***

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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 833-207-1288 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.

As of January 2017, candidates may reschedule their examination to a new eligibility window upon submitting a new application and paying a rescheduling described in the Fees section above.

## **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> or call PSI at 833-207-1288.

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 a Scheduling Authorization from PTC, via email.

### ***Online Testing Tutorial***

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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.

Go to <http://www.ptcny.com/cbt/demo>.

### ***Scheduling Your Examination Appointment***

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After your CPSM application and fees have been received, you will be sent a Scheduling Authorization by email. Print this Scheduling Authorization 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 a Scheduling Authorization within two weeks after you have paid your examination fee, contact the Professional Testing Corporation at 212.356.0660 for a duplicate.

The Scheduling Authorization 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 Scheduling Authorization 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 PTC if you do not receive your Scheduling Authorization email within 10 days of submitting your payment.
- 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***

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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***

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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***

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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***

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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**

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1. You must present your current driver's license, passport, or U.S. Military ID at the time of your scheduled appointment. Temporary/paper IDs will not be accepted at the testing center. **Candidates without their valid ID or with temporary paper IDs 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 technology such as smart watches; 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 examination 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.
6. Bulky clothing, such as sweatshirts (hoodies), jackets, coats and hats, except hats worn for religious reasons, may not be worn while taking the examination.
7. All watches and "Fitbit" type devices cannot be worn during the examination. It is suggested that these items are not brought to the test center.

## **Security Procedures**

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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**

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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](http://www.ptcny.com).

**Only those requests made and received on the official Request for Special Needs Accommodations Form (found at [www.ptcny.com](http://www.ptcny.com)) will be reviewed. Letters from doctors and other healthcare professionals must be accompanied by the official Form and will not be accepted without the Form.**

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.

## INTERNATIONAL TESTING

Candidates outside of the United States and Canada must complete and submit the Request for Special Testing Center Form found on the [www.ptcny.com](http://www.ptcny.com) homepage. This form must be uploaded to your application no later than 8 weeks prior to the start of the chosen testing period. Fees for testing at an international computer test center (outside of the United States and Canada) are \$100.00 in addition to the examination fee. PTC will arrange a computer based examination at an international test center for you. **Please note that all examinations are administered in English.**

## 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**

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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](http://www.ptcny.com) and pay the retesting fee.

### **Appeals Process**

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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**

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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**

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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***

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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**

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### ***Release of Information***

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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***

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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%**

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#### **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%**

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### **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%**

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### **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%**

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### **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

## **DOMAIN 5: PROMOTIONAL ACTIVITY - 13%**

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### **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%**

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### **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.