

# CERTIFIED PROFESSIONAL SERVICES MARKETER EXAMINATION

HANDBOOK FOR CANDIDATES



Certified Professional Services Marketer  
An SMPS Certification Program

Effective February 2024



The Society for Marketing Professional Services (SMPS) is a diverse community of marketing and business development professionals working together to move the A/E/C industries forward.

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**This handbook contains necessary information about the Certified Professional Services Marketer (CPSM) Examination. 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 (see Appendix 6).

## CPSM Program Overview

The Certified Professional Services Marketer (CPSM) designation was developed by SMPS to elevate professional standards, enhance individual performance, and identify those who demonstrate knowledge essential to the practice of professional services marketing. Founded in 1999, the program is a voluntary certification.

The CPSM examination is offered solely by the Society for Marketing Professional Services. The Society's specific responsibilities, in partnership with Professional Testing Corporation, are the development, administration, and ongoing evaluation of the certification program.

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

**Professional Testing Corporation (PTC)**

1350 Broadway, Suite 800  
New York, NY 10018  
[www.ptcny.com](http://www.ptcny.com)  
212.356.0660

Questions regarding the certification process may be referred to Professional Testing Corporation, 212.356.0660, or [www.ptcny.com/contact](http://www.ptcny.com/contact).

## 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 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 Examination is administered during two established three-week testing windows on a daily basis, excluding holidays, at computer-based testing facilities managed by Prometric.

# CPSM Benefits

Professionals who have made a commitment to professional services marketing as a career and have earned a CPSM designation report enjoying the following benefits:

## Direct Benefits

- Promotion and/or increased compensation
- Enhanced credibility as a professional
- Increase in responsibility
- Improved ability to compete in the job market
- Firm recognition

## Indirect Benefits

- Peer recognition and respect
- Personal prestige
- Increased confidence

The CPSM designation is a mark of distinction. In summary, earning your CPSM can:

- ✓ Demonstrate your skills
- ✓ Show initiative when certification is not required
- ✓ Verify to management and peers that the Society is effectively validating your skills
- ✓ Keep you valuable and marketable in the event of changeovers, mergers, etc.
- ✓ Differentiate you from peers
- ✓ Expand your professional network

# CPSM Eligibility and Application 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 6)

All candidates are encouraged to confirm their eligibility prior to submitting their application.

## 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 [ptcny.com/test-sponsors/smps/](https://ptcny.com/test-sponsors/smps/).
2. Complete the online application, upload a copy of your degree or transcript, and pay the appropriate fee. The application fee is a one-time fee. Credit cards are the only form of accepted payment.
  - ✓ Eligible candidates may select one of two three-week testing windows offered to sit for the CPSM examination.
  - ✓ Candidates who fail and wish to retake the examination may do so upon submission of a new application (no repayment requirement) and payment only of the retesting fee.

## 2025 TESTING WINDOWS

APPLICATION DEADLINE	TESTING WINDOW
February 5, 2025	March 1-22, 2025
August 6, 2025	September 6-27, 2025

## 2024 TESTING WINDOWS

APPLICATION DEADLINE	TESTING WINDOW
February 1, 2024	March 2-23, 2024
August 1, 2024	September 7-28, 2024

## FEES

Fees for the CPSM examination:

MEMBER FEES	NON-MEMBER FEES
Application: \$245	Application: \$350
Examination: \$275	Examination: \$415
<b>TOTAL \$520</b>	<b>TOTAL \$765</b>

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

Retesting fees for the Certified Professional Services Marketer examination:

EXAMINATION
Member Fee: \$275
Non-Member Fee: \$415

## REFUNDS AND TRANSFERS

- There will be no refund of fees unless applicants are ineligible for the examination.
- Ineligible candidates will be refunded their fees minus a \$75 administrative fee.
- No refunds will be issued for applying for the incorrect examination or testing period, for failing to make an examination appointment, or for failing to appear at your scheduled appointment.

Please be advised: Prometric does not have the authority to grant transfers to another testing period or refunds.

Candidates are able to reschedule their examination appointment within the same testing period as long as the request is submitted within a specific timeframe. For more information, please see the Rescheduling Examination Appointments Within a Testing Period section.

# CPSM Examination Administration

The CPSM Examination is administered during two established three- week testing windows on a daily basis, excluding holidays, at computer-based testing facilities managed by Prometric.

## SCHEDULING AUTHORIZATION

PTC will send approved candidates an email called the Scheduling Authorization. These emails are sent out approximately 11 weeks before the first day of the testing window. The emails come from [notices@ptcny.com](mailto:notices@ptcny.com).

Candidates may not make an appointment until they receive a scheduling authorization. If you don't receive your email three weeks before the start of your testing window, contact PTC.

## SCHEDULING EXAMINATION APPOINTMENTS

The Scheduling Authorization will indicate how to schedule your examination appointment with Prometric as well as the dates during which testing is available. Appointment times are first-come, first-served, 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. Candidates who wait until the last minute run the risk of missing out on their preferred date, time, and testing center. Candidates unable to schedule an appointment will forfeit their fees.

After you make your test appointment, Prometric will send you a confirmation email with the date, time, and location of your exam. Please check this confirmation carefully for the correct date, time, and location. Contact Prometric at 800.741.0934 if you do not receive this email confirmation or if there is a mistake with your appointment.

NOTE: International candidates may also schedule, reschedule, or cancel an appointment online at <http://www.prometric.com/SMPS>.

## EXAM APPOINTMENT AND TESTING TIME

Plan to be at the exam site for **3.5 hours** (3 hours and 30 minutes):

**0.50 hours** (30 minutes) pre-exam check-in

**3.00 hours** and minutes of SEAT time at the computer

- 2.75 hours (2 hours and 45 minutes) to answer the 150 questions
- 0.25 hours (15 minutes) of non-exam content: NDA, tutorial, and post-exam survey

**3.50 total hours** (3 hours and 30 minutes) at the exam site

- The amount of time you will have to answer the questions is 2.75 hours (2 hours and 45 minutes).
- You need to arrive at the testing center 30 minutes before the start of the exam for check-in and security procedures.
- The exam will begin at your appointment time
- The first 10 minutes will be administrative procedures: NDA and tutorial
- The timing countdown will begin when you start the exam questions.
- The exam has a visible timer that will let you know the amount of time remaining to answer the questions. You may end the test before the 2.75 limit, but if you end the exam early, you will not be able to return.
- When you end the exam, there is an additional 5 minutes on the computer to take a survey.

## RESCHEDULING EXAMINATION APPOINTMENTS WITHIN A TESTING PERIOD

Candidates are able to reschedule their examination appointments within the same testing period as long as the request is submitted within the timeframe described below.

Reschedule within the permitted time frame by calling or going to the Prometric website: [www.prometric.com/SMPS](http://www.prometric.com/SMPS).



TIME FRAME	RESCHEDULE PERMITTED?	STIPULATIONS
Requests submitted 30 days or more before the original appointment	Yes	None
Requests submitted 29 to 5 days before the original appointment	Yes	Candidate must pay Prometric a rescheduling fee of \$50.
Requests submitted less than 5 days before the original appointment	No	Candidates who do not arrive to test for their appointment will be considered a no-show and all their examinations fees will be forfeited. Candidates may request a one-time transfer to a future testing period. A \$275 transfer fee will apply.

**PLEASE NOTE:**  
Canceling your examination appointment will result in a forfeiture of examination fees.

## Transferring to a New Testing Period

Candidates unable to take the examination during their scheduled testing period may request a one-time transfer to a future testing period. There is a transfer fee of \$275.00. After you have transferred once by paying the \$275.00 fee, you will need to pay the full examination fee to transfer a second time; so, please plan carefully.

Please note: Requests to transfer to a new testing period must be received by the application deadline for the next scheduled testing period.

Candidates wishing to transfer to a new testing period need to follow the steps below.

1. Go to <http://secure.ptcny.com/apply>.
2. Click "Start New Application."
3. Choose SMPS-CPSM in the first drop-down menu; then choose the new examination period in the second drop down menu and fill out the rest of the information on the page.
4. Fill out the application making sure you answer YES to the question asking if you are transferring.
5. When you have finished the application, click "Submit Transfer Request."
6. PTC Support will send you an email letting you know your transfer application was approved and that you can log back into your application and pay the \$275.00 transfer fee.

Call PTC at 212.356.0660 if you have any questions regarding the transfer process.

If candidates are unable to attend the examination on the date for which they registered and elect not to transfer to another testing period, the application will be closed. There will be no refund of fees.

The transfer fee is based on costs and is not punitive in nature. The transfer fee must be paid at the time the request is approved.

**PLEASE NOTE:** Transferring your examination only refers to instances when a candidate is unable to take their exam during a testing period for which they have already applied.

## 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, SMPS relies 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 are validated by practicing marketers of professional services across the United States. Second, experts in the field of marketing professional services validate all questions in the examination.

## EXAMINATION DEVELOPMENT

SMPS, in partnership 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 trends of the profession.

Questions appearing on the CPSM examination have been subjected to rigorous review. Each question is validated 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 four-option, multiple choice questions that were developed in accordance with the SMPS Domains of Practice (see Appendix 1). The 150 questions include 130 scored items, plus 20 pre-test items. The pre-test questions are randomly distributed throughout the examination and do not count towards a candidate's score. The pre-test items are being evaluated to determine if they perform well enough statistically to be introduced as scored items on a future examination. Only the scored items count towards the candidate's final score. The minimum passing score is 93 correctly answered questions. The Domains serve as the foundation for the CPSM examination. Candidates have 2.75 hours (2 hours and 45 minutes) to answer the questions.

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.

## PREPARATION FOR EXAMINATION

SMPS does not offer, nor approve/disapprove exam study groups, however, several SMPS chapters have developed study groups and have curated examination preparation tools to assist candidates gain an understanding of the topics covered on the examination. SMPS recommends that candidates interested in joining a study group connect with their local chapter.

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.** The Domains serve as the foundation for the examination. 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.

A list of suggested reading is provided online at: [www.smps.org/Certification/Study](http://www.smps.org/Certification/Study).

## ONLINE PRACTICE TEST

Two practice tests are available to provide candidates with a better understanding of what the actual CPSM examination is like. Each practice test consists of 50 questions, has a testing time of two hours, and is taken online available 24 hours a day/7 days a week. The practice test is developed according to the CPSM's test specifications (content outline).

After completing the online practice test, you will receive an instant score report showing overall test score as well as a score for each content area. The score report does not provide correct answers or indicate which questions were answered correctly or incorrectly. Once the practice test is scored, you cannot return to the test to review the questions.

The practice test does not provide diagnostic information. The results of the practice test should not be interpreted as a predictor of performance on the actual examination. The scores do not provide a valid or reliable indicator of how well you will perform on the actual examination. The purpose of the practice test is to familiarize candidates with the format of the questions. The PTC Online Testing System does not demonstrate the testing software used during the certification examinations. Those who purchase the online practice test should be aware that they will use a different testing platform when they take certification examinations at designated proctored testing centers.

The online practice test is an optional tool candidates may use as they prepare for the certification examination. The practice test is not a requirement for certification eligibility, nor does it contribute in any way to success on the certification examination. There are many ways candidates should prepare for the certification examination.

1. Candidates should use a variety of resources and consider their own education and experiences.
2. Review the content outline and reference materials listed in the handbook for additional exam-related information.

Since the practice test is NOT intended to be a study guide nor the sole source of preparation for the actual certification examination, candidates are NOT provided with the answer key, rationales for each question, nor notification of which specific items were answered correctly or incorrectly.



## CONTENT INCLUDED IN THE ONLINE PRACTICE TEST for the CERTIFIED PROFESSIONAL SERVICES MARKETER (CPSM)

- Domain I. Research (6 questions)
- Domain II. Planning (8 questions)
- Domain III. Client & Business Development (11 questions)
- Domain IV. Proposals (9 questions)
- Domain V. Promotional Activity (7 questions)
- Domain VI. Management (9 questions)

### FEE:

- Each approved candidate will receive complimentary access to one practice test.
- Additional tests: \$75 payable by credit card online at <https://secure.ptcny.com/webtest/>

Questions? Please call PTC at 212.356.0660

# CPSM Test Administration Information

## RULES OF THE EXAMINATION

- ✓ 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.**
- ✓ No 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; wearable technology (such as smart watches), MP3 players (such as iPods), pagers, cameras, and voice recorders are permitted to be used and cannot be taken in the examination room. Prometric provides lockers for your personal items
- ✓ No papers, books or reference materials may be taken into or removed from the examination room.
- ✓ 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.

- ✓ Candidates are prohibited from leaving the testing room while their examination is in session, with the sole exception of going to the restroom.
- ✓ Candidates who take an unscheduled break are subject to additional security screenings before being permitted to reenter the testing room.
- ✓ Bulky clothing, such as sweatshirts (hoodies), jackets, coats, and hats (except hats worn for religious reasons), and most types of jewelry may not be worn while taking the examination. Proctors will ask you to remove such items and place them in your locker. Please see Prometric's statement on Test Center Security for more information.
- ✓ 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.
- ✓ No food/beverages are permitted inside the testing room. Leave these items in your assigned locker.
- ✓ Candidates will have 2.75 hours (2 hours and 45 minutes) to answer the 150 exam questions.

## TESTING CONDITIONS OR EXAMINATION FEEDBACK

Any candidate who feels that the examination effort was negatively impacted by the test center conditions should notify the proctor immediately. The situation should also be reported to PTC at [www.ptcny.com/contact](http://www.ptcny.com/contact) within 3 business days of the test appointment. Any comments about the test itself should also be reported to PTC at [www.ptcny.com/contact](http://www.ptcny.com/contact) within 3 business days of the test appointment.

## 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. Lockers are provided to candidates. Accessing cell phones and electronic devices at any time while you are taking the exam is prohibited. You can only remove snacks, drinks, medications, or personal healthcare items from your locker. No backpacks, bags, pocketbooks, or clothing can be removed while your 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 Prometric 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.

## TESTING ACCOMMODATIONS

SMPS and PTC support the intent of and comply with the Americans with Disabilities Act (ADA). PTC will take steps reasonably necessary to make certification accessible to persons with disabilities covered under the ADA. According to the ADA, an individual with a disability is a person who has a physical or mental impairment that substantially limits a major life activity (such as seeing, hearing, learning, reading, concentrating, walking) or a major bodily function (such as neurological, endocrine, or digestive system). The information you provide and any documentation regarding your disability and test accommodations will be held in strict confidence.

All approved testing accommodations must maintain the psychometric nature and security of the examination.

Accommodations that fundamentally alter the nature or security of the exam will not be granted.

Testing arrangements may be made upon receipt of the application, examination fee, and a completed and signed Request for Special Needs Accommodations Form, available from [www.ptcny.com/PDF/PTC\\_SpecialAccommodationRequestForm.pdf](http://www.ptcny.com/PDF/PTC_SpecialAccommodationRequestForm.pdf) or by calling PTC at 212.356.0660.

This form must be uploaded with the online application no later than 8 weeks prior to the start of the chosen testing period.

Only those requests made and received on the official Request for Special Needs Accommodations Form 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. All requests must be made at the time of application. Accommodations cannot be added to an existing exam appointment.

# Test Scoring and Score Reporting

## EXAMINATION: QUESTION ANALYSIS

SMPS, in accordance with PTC, will evaluate the statistical properties of all questions on the examination. Any items demonstrating potential questionable statistical properties are flagged and reviewed by SMPS content experts.

## SCORING PROCEDURE

The passing score for the CPSM examination has been reviewed and approved by SMPS and has been determined using a criterion-referenced methodology.

## SCORE PROCESSING AND REPORTING

Candidates will be notified via email by PTC within four weeks of the close of the testing period whether they have passed or failed the examination. Scores on the major areas of the examination and on the total examination will be reported. A failing candidate can find information about their performance by studying the Area Scores. The Area Scores shows a candidate where their strengths and weaknesses are by domain. This information can guide candidates in their future examination preparation. Failure to receive the report of the results should be reported to PTC at 212.356.0660.

Candidates are not eligible to use the CPSM credential until their official passing score is received.

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

## RE-EXAMINATION

If a candidate fails to achieve a test score equal to or greater than the minimum passing score of 93 upon their initial attempt, the candidate may elect to retake the exam. A new application must be submitted online at [www.ptcny.com](http://www.ptcny.com) and the retest fee (only) must be paid. The original application fee stands and is not required to be submitted.

The CPSM examination may be taken as often as desired. There is no limit to the number of times the examination may be repeated; however, candidates may not retest during the same testing period/window.

# CPSM Certification and Recertification

## RECOGNITION OF CERTIFICATION

Candidates who pass the examination will be entitled to use the CPSM designation after their name. A digital

CPSM badge and certificate will be provided to each SMPS certified candidate. The digital badge will include SMPS contact information, certification date, expiration date, link to SMPS website, and description of competencies addressed in the certification exam. Certificants can download a standard PDF certificate if desired. 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 organizations offering educational content that relates to the SMPS Domains of Practice.

Failure to accumulate the minimum 50 CEUs, to submit a recertification application, and to submit recertification fees will result in revocation of the CPSM designation. Effective January 1, 2025, deactivated CPSMs will be required to apply for, sit for, and pass, the current CPSM exam to reactivate.

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. Program content must be based on, or cover, SMPS Domains of Practice. 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 may not be counted.

## 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 SMPS on 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 [knowledge@smps.org](mailto:knowledge@smps.org). SMPS maintains a current listing of Certified Professional Services Marketers.

## NONDISCRIMINATION

SMPS endorses the principles of equal opportunity. Eligibility criteria for examination and certification under the CPSM program are applied equally to all applicants.

## SMPS DIVERSITY, EQUITY, AND INCLUSION PHILOSOPHY & POLICY

SMPS recognizes, respects, and values the dignity of all people. We are united in our stance against all forms of injustice and inequity. SMPS commits to actively champion diversity, equity, and inclusion (DEI) within our organization, the firms we represent, the communities we serve, and the architecture/engineering/construction (A/E/C) industries. We are intentionally working to increase participation in our organization and the A/E/C industries by underrepresented groups; advocate for recruitment and retention of professionals of all backgrounds by creating inclusive and welcoming environments; and promote equality and opportunities for advancement in the Society and industry overall. Together, we can transform our businesses, enhance membership experiences, and influence change in our communities.

We recognize that our diversity is reflected by our different people and firms. We believe our varying ethnicities, cultures, religious beliefs, genders, sexual orientations, ages, levels of experiences, physical abilities, and other differences benefit us as individuals and as an organization. In SMPS, we will organize and promote programs and activities that espouse our beliefs and increase awareness, understanding, recruitment, and participation of diverse persons and firms.



## Content Outline

The SMPS Domains of Practice serve as the foundation for the CPSM Exam. The content outline for the current CPSM examination was developed using the results of a 2021 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 Research may relate to such skills as forecasting trends and monitoring federal, state, and local regulatory matters and requirements. Preparation for the examination should be focused on both domains/skills and knowledge requirements to demonstrate those skills.

To evaluate readiness for the CPSM exam, CPSM candidates are encouraged to review the Knowledge Areas and Skill Sets to assess their knowledge in each of the six Domains of Practice for Professional Services Marketing.

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 and assessed your ratings, you can set your professional development goals by focusing on the areas where you have the highest score differences.

### DOMAIN 1: RESEARCH (12%)

#### Knowledge Areas

- Research Design
- Market Research Techniques
- Data Gathering/Analysis Techniques
- Federal, State, and Local Regulations
- Industry Terminology

#### Skill Sets

- Monitor social, demographic, cultural, and economic trends
- Maintain a network of contacts to keep abreast of relevant markets and trends
- Monitor federal, state, and local regulatory matters and requirements
- Read publications/online resources for industry-related market information
- Forecast how trends will affect business trends
- Set up methodologies and systems for collecting and evaluating information

- Design research studies (i.e., post-occupancy studies, etc.)
- Gather research data
  - ✓ Online lead subscriptions (free or paid)
  - ✓ Interviews
  - ✓ Surveys
  - ✓ Focus groups
- Analyze and document research results
- Stay abreast of marketing research trends and tools
- Conduct client perception studies

### DOMAIN 2: PLANNING (16%)

#### Knowledge Areas

- Strategic Plan Components
- Business Plan Components
- Marketing Plan Components
- Marketing Budget Management
- Organizational and Management Principles
- Appropriate Communication Techniques
- Federal, State, and Local Regulations
- Industry Terminology
- Management of Third-party Service Providers
- Advertising Media
- Social Media Management
- Digital Marketing Management

#### Skill Sets

- Interpret market research results
- Incorporate industry competitive intelligence data into marketing planning
- Analyze firm's historical and current data
- Define and analyze relevant markets

- Lead market strategy sessions
  - ✓ SWOT (Strengths, Weaknesses, Opportunities, Threats)
  - ✓ SOAR (Strengths, Opportunities, Aspirations, Results)
  - ✓ Other types of analysis
- Identify key performance indicators (KPIs) and establish benchmarks to review progress
- Conduct and document planning exercises
- Align annual marketing and business development plans with strategic plan
- Create a marketing and/or a business development plan
- Create and manage a marketing and/or a business development budget
- Evaluate industry marketing cost data for planning purposes
- Manage implementation of a marketing plan and revise as necessary
- Conduct a cost/benefit analysis and ROI of marketing efforts

### DOMAIN 3: CLIENT AND BUSINESS DEVELOPMENT (21%)

#### Knowledge Areas

- Strategic Plan Components
- Business Plan Components
- Marketing Budget Management
- Appropriate Communication Techniques
- Contact Management Systems
- Federal, State, and Local Regulations
- Industry Terminology
- Contract Components
- Negotiation Techniques
- Management of Third-party Service Providers
- Training and Motivational Techniques
- Group Dynamics and Team-Building Principles
- Event Planning
- Business Etiquette and Protocol
- Client Relationship Management
- Presentation Techniques
- Finding Leads

#### Skill Sets

- Create business development strategies
- Research prospective clients and client industries

- Build and maintain a network of industry relationships
- Pre-qualify a client
- Pre-qualify a project
- Maintain a contact database
- Measure client satisfaction throughout project and as post-project debrief
- Identify client hot buttons
- Identify and recommend teaming partners to meet client requirements
- Address issues from client satisfaction survey
- Represent firm at external events
- Develop client-specific capture plans
- Develop project-specific capture plans
- Create client development plan
- Monitor capital budgets/capital improvement programs (CIPs)

### DOMAIN 4: PROPOSALS (19%)

#### Knowledge Areas

- Business Operation Financials
- Marketing Budget Management
- Appropriate Communication Techniques
- Federal, State, and Local Regulations
- Industry Terminology
- Creative Design Elements and Principles
- Media Law and Copyright Principles
- Contract Components
- Negotiation Techniques
- Management of Third-party Service Providers
- Personnel Management
- Group Dynamics and Team-Building Principles
- Business Etiquette and Protocol
- Client Relationship Management
- Presentation Techniques
- Proposal Management

#### Skill Sets

- Determine firm's capability to perform requested project
- Determine value of the project to the firm
- Identify firms for teaming/partnering
- Conduct RFQ/RFP strategy sessions
- Lead a go-no go discussion
- Understand fee structure and participate in pricing discussions



- Develop and coordinate proposal compliance plan
- Manage production of a proposal
- Develop strategy and prepare for interview presentation
- Understand contract terms and participate in contract negotiations
- Track proposal schedule and criteria elements
- Conduct post-award debriefing regardless of outcome
- Track and report proposal win rates
- Implement a proposal close-out process

## DOMAIN 5: PROMOTIONAL ACTIVITY (13%)

### Knowledge Areas

- Marketing Budget Management
- Appropriate Communication Techniques
- Contact Management Systems
- Federal, State, and Local Regulations
- Industry Terminology
- Creative Design Elements and Principles
- Media Law and Copyright Principles
- Management of Third-party Service Providers
- Event Planning
- Advertising Media
- Social Media Management
- Digital Marketing Management
- Client Relationship Management
- Crisis Communications Management

### Skill Sets

- Manage third-party service providers
- Develop appropriate strategies to effectively communicate corporate brand
- Incorporate unique value proposition into external communications
- Plan and implement trade show strategies and activities
- Develop a promotional plan and maintain media relationships
- Develop and implement communications plan, incorporating traditional, digital, and social media
- Prepare leadership and senior staff to interact with media, including crisis communications planning
- Develop and implement advertising plan
- Develop entertainment strategies
- Coordinate firm special events

- Strategize, research, and prepare award competition entries
- Evaluate effectiveness of promotional plan, including all types of media and analytics
- Manage expenditures consistent with budget

## DOMAIN 6: MANAGEMENT (19%)

### Knowledge Areas

- Strategic Plan Components
- Business Plan Components
- Marketing Plan Components
- Business Operation Financials
- Marketing Budget Management
- Organizational and Management Principles
- Appropriate Communication Techniques
- Contact Management Systems
- Federal, State, and Local Regulations
- Industry Terminology
- Contract Components
- Negotiation Techniques
- Management of Third-party Service Providers
- Personnel Management
- Training and Motivational Techniques
- Group Dynamics and Team-Building Principles
- Business Etiquette and Protocol
- Client Relationship Management

### Skill Sets

- Supervise marketing and support staff
- Communicate across department and/or branch offices
- Effectively use information management systems
- Develop an internal communications program
- Conduct marketing and business development training for staff
- Promote a firm-wide business development culture
- Create professional development plan for staff
- Recruit and train marketing personnel
- Work with HR departments on recruiting programs
- Evaluate marketing processes to improve efficiency
- Comply with business and accounting principles
- Effectively use and maintain customer relationship management (CRM) system
- Develop/monitor marketing and business development KPIs



## Recommended Reading List

Because this exam is a criterion-based exam, you will NOT find the answers to the questions in any one textbook. Preparation for success on the exam requires that you read a broad range of resources, integrating the innovative thinking and espoused best practices into your thinking.

SMPS recommends the following resources to prepare for the CPSM exam:

MARKENDIUM: The Essentials (Volume 1-6), by Society for Marketing Professional Services (SMPS Publications: 2023), available at Amazon.com

### SUPPLEMENTAL READING

1. A/E/C Marketing Fundamentals, by Holly Bolton, Julie Huval, Stephen Jones, Kevin Miller, David Shelton, and Ronald Worth, (SMPS Publications: 2015), available at Amazon.com
2. [re]wired: Selling Your AE Services in a Post-Recession World, David A. Stone, Gail
3. MARKETER Journal: The Society's award-winning bimonthly journal, reporting on current business development and marketing practices, issues, and trends

## CPSM Code of Ethics

As a Certified Professional Services Marketer (CPSM), it is the Society'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.



About the Society for Marketing Professional Services

**BUSINESS TRANSFORMED THROUGH MARKETING LEADERSHIP.**

The Society for Marketing Professional Services (SMPS) is the only organization dedicated to creating business opportunities in the A/E/C industries. SMPS provides leadership and professional development programs, industry research, business-building events, and vital marketing resources. Through SMPS, A/E/C professionals in North America tap into powerful networks to form project teams, secure business referrals and intelligence, and benchmark performance. The Society is committed to validating the practice of marketing and business development as essential to the success of all professional services firms. Learn more about SMPS at [smps.org](http://smps.org).