

# CPSM Study Group Toolkit



Certified Professional Services Marketer  
An **SMPS** Certification Program



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 industry forward.

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# Introduction

Chapter volunteers, thank you for your dedication to SMPS!

The Society is grateful for all that you do to champion the CPSM program. Within this document, you'll find a variety of resources to help you understand and share current details and processes of becoming a Certified Professional Services Marketer (CPSM).

All information pertaining to exam preparation resources shared is available on the SMPS website under the [Professional Development tab](#). This page provides links to information on how to become a CPSM, the recertification process, and exam preparation resources.

## Benefits of Becoming a CPSM

To earn designation, CPSMs must demonstrate that they have industry experience and have mastered the [SMPS Domains of Practice for Professional Services Marketers](#), which outline the day-to-day functions of professional services marketers and business developers. As professionals continue to climb the ladder in their careers, a CPSM designation helps distinguish these professionals as proven leaders who have made a commitment to professional excellence, career advancement, and an ongoing pursuit of knowledge through the domains.

There are currently over 1150 CPSMs. The benefits they have reported to SMPS include:

### Direct Benefits

- Professional development and compensation
- Salary increase
- Increase in responsibility and role elevation

### Indirect Benefits

- Respect from technical staff
- Personal prestige
- Increased confidence
- Peer and firm recognition

### Summary of Benefits

- Demonstration of current skills
- Shows initiative when certification is not required
- Verifies to management that the Society is effectively validating skills
- Keeps professionals valuable and marketable
- Provides professionals with personal satisfaction in mastering new material

# Starting a CPSM Study Group

Candidates are encouraged to participate in group sessions to complement private study time. The focused discussions with fellow candidates and review of concepts found in exam preparation resources can help with retaining information and build camaraderie with peers.

Many SMPS chapters host in-person and/or virtual study groups and have curated exam preparation tools to assist candidates gain an understanding of the topics covered on the exam. These CPSM study groups help candidates in their preparation for the CPSM exam. Group participation aids candidates in personal growth as they move towards achieving the CPSM credential. SMPS HQ does not offer, nor approve/disapprove, exam study groups.

Listed below are ten steps for building a CPSM study group program at your chapter.

1. **Designate a Leader:** Find someone in your chapter, ideally a CPSM or SMPS Fellow, to lead the study group. This person must have the time and passion for this assignment. The study group leader should not be expected to do all the work, but rather help coordinate the chapter study group.
2. **Determine Interest:** Chapters leaders and study group leaders should communicate with local SMPS members to determine who is interested in preparing for the CPSM examination.
3. **Determine Needs:** Share the [SMPS Gap Analysis tool](#) with candidates to evaluate the individual and group levels of knowledge and skill sets. This evaluation method can determine the course of study.
4. **Build a Resource Pool:** Compile a list of CPSMs and Fellows of your chapter. Determine who is willing to help candidates prepare, review and study resources, share books, etc.
5. **Hold an Initial Meeting/Kick-off:** Invite interested candidates and a few CPSMs to the first meeting. Share information on not only the exam format but the available preparation resources. Encourage CPSMs to share testimonials.
6. **Set a Schedule:** Chapters have had success meeting once a week; some, every other week or once a month to review the six [SMPS Domains of Practice for Professional Services Marketing](#). It is important to give candidates time between study group meetings to review each domain. Many chapters schedule a final review session as a refresher for all the domains before testing. Remind candidates to assess the time necessary to complete the reading.

7. **Assign Resources:** Find Fellows and/or CPSMs willing to facilitate the study sessions. These are people willing to share their knowledge on the domains. Ask CPSMs to review the knowledge areas and skill sets with the candidates. Chapters often develop presentations on each domain that can help with review of the concepts and principles covered in each of the domains.
8. **Support:** Study group leaders should be aware that candidates may hit a snag during the preparation process (life happens). Candidates should try to do everything possible to stay on schedule and attend the study group sessions. Study group leaders can adjust the schedule of meetings based on the consensus of the group. If a candidate's schedule becomes too busy to continue attending meetings, they can always attend future study group sessions.
9. **Assessment:** Upon completion of the CPSM study group program, leaders can assess what was and wasn't successful for the group. These insights can be helpful when planning future study group programs.
10. **Post-Exam Debrief:** Offer a debrief as an opportunity for candidate who tested to share their thoughts and experience. These insights can be especially helpful to study group leaders and future candidates.

## Tips for Organizing a CPSM Study Group

Some chapters open their groups to all SMPS members. If your chapter does not host a study group, or if you receive inquiries from candidates about groups they can join, please connect with [SMPS HQ](#) for tips on how to connect candidates with groups.

Listed below are ten tips for organizing a CPSM study group.

1. Promote the CPSM program and benefits and provide access to information for chapter members and nonmembers. Confirm that your chapter site, specifically the education/professional development pages, include links to [SMPS HQ's Certification page](#), [Recertification page](#), and [CPSM Exam Preparation Resources page](#). Linking to SMPS HQ's site ensures access to all current information.
2. Connect with current chapter study group leaders for smart practices, resources, and potential collaborations. Join the [CPSM Champions Community of MySMPS](#).
3. Read the current [CPSM Handbook](#) and direct all candidates to read the handbook. The handbook serves as the primary resource for detailed information on the CPSM program. The current version of the handbook is always accessible via this [link](#).



4. Read and share the [Frequently Asked Questions document](#) and keep it handy for reference.
5. Offer a CPSM-specific informational session for candidates. A customizable [PowerPoint presentation](#) is available for use.
6. Assess needs: Share and use the [SMPS Gap Analysis for Professional Services Marketing tool](#). This tool can assist individuals and study groups in reviewing the domains and evaluating knowledge levels to determine needs. Keep in mind that both knowledge and experience in professional services marketing are key to exam success.
7. Develop, or direct candidates to, programming based on the [SMPS Domains of Practice for Professional Services Marketing](#). The domains serve as the foundation for the exam. Candidates are responsible for demonstrating the knowledge and skill sets defined within the domains, so access to programs based on the domains is essential.
8. Facilitate opportunities for candidates to interact with peers and experienced industry professional services marketers and business developers to review each domain.
9. Use a complimentary online practice test available to all study groups. Contact [SMPS HQ](#) to request a test. Every approved candidate will receive access to one complimentary test for their personal use. Find detailed information on practice tests within the [CPSM Handbook](#).
10. Celebrate CPSMs! Promote new CPSMs within a chapter newsletter, chapter site, and on social media. Direct new CPSMs to the [CPSM Media Kit](#) to share their achievement with colleagues, clients, and their professional network.

## Resources for Study Groups and Candidates

### PRESENTATION: EVERYTHING YOU NEED TO KNOW ABOUT BECOMING A CPSM

This [PowerPoint presentation](#) is for download and use when presenting introductory information about CPSM. The following information is included:

- Benefits of certification
- Domains of Practice
- Exam eligibility
- Application process

- Exam preparation tips & resources
- Exam format
- Recertification requirements

Chapter leaders may customize this presentation to add additional information.

### EXAM PREPAREDNESS RESOURCES

The following resources can assist groups and individuals prepare for the CPSM exam:

- [SMPS Domains of Practice for Professional Services Marketing](#)
- [CPSM Handbook](#)
- [Gap Analysis for Professional Services Marketing](#)
- Online Practice Tests—view detailed information within the [CPSM Handbook](#)

Suggested reading materials:

- [MARKENDIUM: SMPS Body of Knowledge](#)
- [Marketer journal](#)
- [A/E/C Marketing Fundamentals](#)
- [\[re\]wired: selling Your AE Services in a Post-Recession World](#)

### SMPS HQ CERTIFICATION WEBPAGE

All certification information is located on the [Professional Development tab](#) on the SMPS website. This tab provides links to information on how to become a CPSM, the recertification process, and exam preparation resources. Relevant and timely CPSM information is updated on this page—it's highly recommended that chapters link directly to the [SMPS website](#) for more information on all things CPSM. This practice ensures that candidates and CPSMs have access to accurate information.

### CPSM HANDBOOK

The CPSM Handbook serves as the primary resource for detailed information on the CPSM program—for both candidates and current CPSMs. The handbook is updated each program year and as required. The handbook provides more details on all information listed within this digital toolkit. Accessing the handbook via this [link](#) is recommended to ensure accessing the current version.

### SMPS DOMAINS OF PRACTICE

The [SMPS Domains of Practice for Professional Services Marketers](#) serve as the foundation for the CPSM exam. The domains denote the essential tasks and knowledge areas associated with the profession of professional services marketing. On a regular basis, SMPS partners with [Professional Testing Corporation](#) to conduct a job task analysis survey to help define the scope of practice and knowledge needed for marketers and business developers



in the A/E/C industry. The resulting information provides insight on the core skills most critical for professional services marketing. The domains were last refreshed in 2023.

### MARKENDIUM

Also known as the SMPS Body of Knowledge, MARKENDIUM further defines the six domains for the Society and professional services marketing. The refreshed MARKENDIUM was released in 2023 and is available for purchase on [Amazon](#).

### GAP ANALYSIS FOR PROFESSIONAL SERVICES MARKETING

The SMPS Domains of Practice serve as the foundation for the CPSM exam. From research and planning to client development and promotional activities, the domains help professional marketers and business developers prepare for what's now and what's next in the A/E/C industry. This [gap analysis PDF tool](#) helps CPSM candidates evaluate their level of experience and expertise and determine where skill development may be required.

### ONLINE PRACTICE EXAMS

Practice tests are available through Professional Testing Corporation (PTC) to provide candidates with a better understanding of what the actual CPSM examination is like. Each approved candidate receives complimentary access from PTC to one practice test. Additional tests are available for \$75 payable by credit card on the PTC website. 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. One complimentary practice test is available for use by your study group. Study group leaders are encouraged to contact SMPS VP, Professional Advancement, Natalie Gozzard at [natalie@smps.org](mailto:natalie@smps.org) to request a practice test.

### FREQUENTLY ASKED QUESTIONS (FAQ) DOCUMENT

This easy-to-reference [FAQ document](#) provides accurate and quick answers to the most frequently asked questions received by SMPS HQ. This document can be shared with candidates and serves as a useful resource for study group leaders to address questions about the program.

### THE CPSM CHAMPIONS COMMUNITY OF MYSMPS

CPSM study group leaders are encouraged to join the SMPS members-only exclusive online community, [CPSM Champions](#), to take advantage of discussion and collaboration opportunities (sessions, speakers, program content, etc.) with other chapters and HQ.

### RECERTIFICATION AND CEUs

Information on the recertification process is detailed on the [SMPS website](#) and within the CPSM Handbook. Additionally, Professional Testing Corporation and SMPS HQ each send recertification reminders to all CPSMs. For information on CEUs, please reference and share the [Recertification Guidelines](#).

## Need Additional Information?

For CPSM questions and/or if your chapter does not offer a study group, please reach out to SMPS VP, Professional Advancement, Natalie Gozzard at [natalie@smps.org](mailto:natalie@smps.org) for assistance.



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 industry. 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](https://smps.org).



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