CPSM Certification

Certified Professional Services Marketer Examination

HANDBOOK FOR CANDIDATES
Version 2.0

smps®

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.

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 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. The Society's specific responsibilities are the development, administration, and ongoing evaluation of the certification program. The SMPS Headquarters address is:

> **Society for Marketing Professional Services**
> **625 N. Washington Street, Suite 302**
> **Alexandria, VA 22314**
> **www.smps.org**
> **Phone: 703.549.6117**

Questions regarding the certification process may be referred to the Professional Testing Corporation, 212.356.0660 or **ptcny@ptcny.com/contact**.

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**
> **Phone: 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 ptcny.com/test-sponsors/smps/.

2. Complete the online application, upload a copy of your degree or transcript, and pay the appropriate fee.

   - 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 and payment of the retesting fee.

APPLICATION DEADLINE	TESTING WINDOW
February 7, 2022	March 5–26, 2022
August 3, 2022	September 3–24, 2022

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

- There will be no refund of fees unless applicants are ineligible for the examination.

- Ineligible candidates will be refunded their fees minus an 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.

Examination Administration

The Certification Examination for Professional Services Marketers is administered during an established three-week testing window on a daily basis, excluding holidays, at computer-based testing facilities and via live remote proctoring 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.

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/CMSC**.

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 answering 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**.

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 will need to reapply and pay full examination fees for a future testing period.

Please note: Canceling your examination appointment will result in a forfeiture of examination fees.

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, 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

The SMPS 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

The CPSM examination consists of 150 four-option, multiple-choice questions that were developed in accordance with the SMPS Domains of Practice (see Appendix 2). 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

A list of suggested reading is provided online at: **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

> 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.

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** 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** 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. 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** 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. 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 address changes.

Re-examination

If a candidate fails to achieve a test score equal to or greater than the minimum passing score upon their initial attempt, the candidate may elect to retake the exam. Submit a new application online at **www.ptcny.com** and pay the retesting fee.

CPSM Certification and Recertification

Recognition of Certification

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 and a lapel pin. 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, 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 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 the SMPS certification administrator of 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 the CPSM Certification Program at the SMPS Headquarters. SMPS will maintain 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 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 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.

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%)

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%)

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
- 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%)

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%)

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%)

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%)

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.

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.