

Gap Analysis

For Professional Services Marketing





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Prepare for what's now—and what's next—in A/E/C.



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Over the years, SMPS has analyzed the practice of professional services marketing to determine the knowledge and skills most critical. From this exercise, six Domains of Practice were developed.

From research and planning to client development and promotional activities, the domains help you and your firm prepare for what's now—and what's next—in A/E/C marketing and business development. To assist, we've also developed this supplemental guide, *Gap Analysis for Professional Services Marketing*. The Gap Analysis PDF includes the six Domains so that you can evaluate your level of experience and expertise utilizing one document.

Use the Gap Analysis to:

- Review the six Domains to evaluate your level of knowledge areas and skills sets
- Decide where you need to develop your skills, based on the evaluation
- Advance your career and build business for your firm by putting the domains to work

Follow this scale to score your responses below for each domain's skills sets and knowledge areas:

1

No understanding, skill, or experience

2

Some understanding, skill, or experience

3

Working understanding, skill, or experience

4

Strong understanding, skill, or experience

5

Mastery understanding, skill, or experience

Once you have completed the ratings for "Needed Level," add your totals for each individual domain. Then, you can set your professional development goals by focusing on the domains where you scored the lowest in understanding, skill, or experience. From that, you can discuss your goals with your supervisor and consider learning opportunities to close the gap. To view learning opportunities through SMPS, visit our website at smps.org and choose Professional Development from the menu.



Research

NEEDED LEVEL
(circle one)

I-A. Monitor social, demographic, cultural, and economic trends	1	2	3	4	5
I-B. Maintain a network of contacts to keep abreast of relevant markets and trends	1	2	3	4	5
I-C. Monitor federal, state, and local regulatory matters and requirements	1	2	3	4	5
I-D. Read publications/online resources for industry-related market information	1	2	3	4	5
I-E. Forecast how trends will affect business	1	2	3	4	5
I-F. Set up methodologies and systems for collecting and evaluating information.....	1	2	3	4	5
I-G. Design research studies (i.e., post-occupancy studies, etc.)	1	2	3	4	5
I-H. Gather research data					
• I-H-01. Online lead subscriptions (free or paid).....	1	2	3	4	5
• I-H-02. Interviews.....	1	2	3	4	5
• I-H-03. Surveys.....	1	2	3	4	5
• I-H-04. Focus groups.....	1	2	3	4	5
I-I. Analyze and document research results	1	2	3	4	5
I-J. Stay abreast of marketing research trends and tools.....	1	2	3	4	5
I-K. Conduct client perception studies	1	2	3	4	5
Knowledge areas that are drawn upon to support this domain include:					
K-01. Research Design	1	2	3	4	5
K-02. Market Research Techniques	1	2	3	4	5
K-03. Data Gathering/Analysis Techniques.....	1	2	3	4	5
K-12. Federal, State, and Local Regulations.....	1	2	3	4	5
K-13. Industry terminology	1	2	3	4	5

Total for Domain 1:

Planning

NEEDED LEVEL
(circle one)

II-A. Interpret market research results.....	1	2	3	4	5
II-B. Incorporate industry competitive intelligence data into marketing planning	1	2	3	4	5
II-C. Analyze firm’s historical and current data.....	1	2	3	4	5
II-D. Define and analyze relevant markets.....	1	2	3	4	5
II-E. Lead market strategy sessions					
• II-E-01. SWOT (Strengths, Weaknesses, Opportunities, Threats.....	1	2	3	4	5
• II-E-02. SOAR (Strengths, Opportunities, Aspirations, Results).....	1	2	3	4	5
• II-E-03. Other types of analysis	1	2	3	4	5
II-F. Identify key performance indicators (KPIs) and establish benchmarks to review progress.....	1	2	3	4	5
II-G. Conduct and document planning exercises	1	2	3	4	5
II-H. Align annual marketing and business development plans with strategic plan	1	2	3	4	5
II-I. Create a marketing and/or a business development plan	1	2	3	4	5
II-J. Create and manage a marketing and/or a business development budget	1	2	3	4	5
II-K. Evaluate industry marketing cost data for planning purposes	1	2	3	4	5
II-L. Manage implementation of a marketing plan and revise as necessary	1	2	3	4	5
II-M. Conduct a cost/benefit analysis and ROI of marketing efforts	1	2	3	4	5

Knowledge areas that are drawn upon to support this domain include:

• K-04. Strategic Plan Components.....	1	2	3	4	5
• K-05. Business Plan Components	1	2	3	4	5
• K-06. Marketing Plan Components.....	1	2	3	4	5
• K-08. Marketing Budget Management.....	1	2	3	4	5
• K-09. Organizational and Management Principles	1	2	3	4	5
• K-10. Appropriate Communication Techniques	1	2	3	4	5
• K-12. Federal, State, and Local Regulations.....	1	2	3	4	5
• K-13. Industry Terminology	1	2	3	4	5
• K-18. Management of Third-party Service Providers	1	2	3	4	5
• K-23. Advertising Media.....	1	2	3	4	5
• K-25. Social Media Management.....	1	2	3	4	5
• K-26. Digital Marketing Management.....	1	2	3	4	5

Total for Domain 2:

Client and Business Development

NEEDED LEVEL
(circle one)

III-A. Create business development strategies.....	1	2	3	4	5
III-B. Research prospective clients and client industries.....	1	2	3	4	5
III-C. Build and maintain a network of industry relationships.....	1	2	3	4	5
III-D. Pre-qualify a client.....	1	2	3	4	5
III-E. Pre-qualify a project.....	1	2	3	4	5
III-F. Maintain a contact database.....	1	2	3	4	5
III-G. Measure client satisfaction throughout project and as post-project debrief.....	1	2	3	4	5
III-H. Identify client hot buttons.....	1	2	3	4	5
III-I. Identify and recommend teaming partners to meet client requirements.....	1	2	3	4	5
III-J. Address issues from client satisfaction survey.....	1	2	3	4	5
III-K. Represent firm at external events.....	1	2	3	4	5
III-L. Develop client-specific capture plans.....	1	2	3	4	5
III-M. Develop project-specific capture plans.....	1	2	3	4	5
III-N. Create client development plan.....	1	2	3	4	5
III-O. Monitor capital budgets/capital improvement programs (CIPs).....	1	2	3	4	5

Knowledge areas that are drawn upon to support this domain include:

- **K-04.** Strategic Plan Components..... **1** **2** **3** **4** **5**
- **K-05.** Business Plan Components..... **1** **2** **3** **4** **5**
- **K-08.** Marketing Budget Management..... **1** **2** **3** **4** **5**
- **K-10.** Appropriate Communication Techniques..... **1** **2** **3** **4** **5**
- **K-11.** Contact Management Systems..... **1** **2** **3** **4** **5**
- **K-12.** Federal, State, and Local Regulations..... **1** **2** **3** **4** **5**
- **K-13.** Industry Terminology..... **1** **2** **3** **4** **5**
- **K-16.** Contract Components..... **1** **2** **3** **4** **5**
- **K-17.** Negotiation Techniques..... **1** **2** **3** **4** **5**
- **K-18.** Management of Third-party Service Providers..... **1** **2** **3** **4** **5**
- **K-20.** Training and Motivational Techniques..... **1** **2** **3** **4** **5**
- **K-21.** Group Dynamics and Team-Building Principles..... **1** **2** **3** **4** **5**
- **K-22.** Event Planning..... **1** **2** **3** **4** **5**
- **K-24.** Business Etiquette and Protocol..... **1** **2** **3** **4** **5**
- **K-27.** Client Relationship Management..... **1** **2** **3** **4** **5**
- **K-29.** Presentation Techniques..... **1** **2** **3** **4** **5**
- **K-31.** Finding Leads..... **1** **2** **3** **4** **5**

Total for Domain 3:

Proposals

NEEDED LEVEL
(circle one)

IV-A. Determine firm’s capability to perform requested project	1	2	3	4	5
IV-B. Determine value of the project to the firm.....	1	2	3	4	5
IV-C. Identify firms for teaming/partnering	1	2	3	4	5
IV-D. Conduct RFQ/RFP strategy sessions	1	2	3	4	5
IV-E. Lead a go-no go discussion.....	1	2	3	4	5
IV-F. Understand fee structure and participate in pricing discussions.....	1	2	3	4	5
IV-G. Develop and coordinate proposal compliance plan	1	2	3	4	5
IV-H. Manage production of a proposal	1	2	3	4	5
IV-I. Develop strategy and prepare for interview presentation.....	1	2	3	4	5
IV-J. Understand contract terms and participate in contract negotiations.....	1	2	3	4	5
IV-K. Track proposal schedule and criteria elements	1	2	3	4	5
IV-L. Conduct post-award debriefing regardless of outcome.....	1	2	3	4	5
IV-M. Track and report proposal win rates.....	1	2	3	4	5
IV-N. Implement a proposal close-out process	1	2	3	4	5

Knowledge areas that are drawn upon to support this domain include:

- **K-07.** Business Operation Financials **1** **2** **3** **4** **5**
- **K-08.** Marketing Budget Management..... **1** **2** **3** **4** **5**
- **K-10.** Appropriate Communication Techniques
- **K-12.** Federal, State, and Local Regulations..... **1** **2** **3** **4** **5**
- **K-13.** Industry Terminology
- **K-14.** Creative Design Elements and Principles..... **1** **2** **3** **4** **5**
- **K-15.** Media Law and Copyright Principles..... **1** **2** **3** **4** **5**
- **K-16.** Contract Components
- **K-17.** Negotiation Techniques
- **K-18.** Management of Third-party Service Providers
- **K-19.** Personnel Management..... **1** **2** **3** **4** **5**
- **K-21.** Group Dynamics and Team-Building Principles..... **1** **2** **3** **4** **5**
- **K-24.** Business Etiquette and Protocol..... **1** **2** **3** **4** **5**
- **K-27.** Client Relationship Management..... **1** **2** **3** **4** **5**
- **K-29.** Presentation Techniques
- **K-30.** Proposal Management..... **1** **2** **3** **4** **5**

Total for Domain 4:

Promotional Activity

NEEDED LEVEL
(circle one)

V-A. Manage third-party service providers.....	1	2	3	4	5
V-B. Develop appropriate strategies to effectively communicate corporate brand	1	2	3	4	5
V-C. Incorporate unique value proposition into external communications	1	2	3	4	5
V-D. Plan and implement trade show strategies and activities	1	2	3	4	5
V-E. Develop a promotional plan and maintain media relationships.....	1	2	3	4	5
V-F. Develop and implement communications plan, incorporating traditional, digital, and social media	1	2	3	4	5
V-G. Prepare leadership and senior staff to interact with media, including crisis communications planning.....	1	2	3	4	5
V-H. Develop and implement advertising plan.....	1	2	3	4	5
V-I. Develop entertainment strategies	1	2	3	4	5
V-J. Coordinate firm special events.....	1	2	3	4	5
V-K. Strategize, research, and prepare award competition entries.....	1	2	3	4	5
V-L. Evaluate effectiveness of promotional plan, including all types of media and analytics.....	1	2	3	4	5
V-M. Manage expenditures consistent with budget	1	2	3	4	5

Knowledge areas that are drawn upon to support this domain include:

• K-08. Marketing Budget Management.....	1	2	3	4	5
• K-10. Appropriate Communication Techniques	1	2	3	4	5
• K-11. Contact Management Systems	1	2	3	4	5
• K-12. Federal, State, and Local Regulations.....	1	2	3	4	5
• K-13. Industry Terminology	1	2	3	4	5
• K-14. Creative Design Elements and Principles.....	1	2	3	4	5
• K-15. Media Law and Copyright Principles	1	2	3	4	5
• K-18. Management of Third-party Service Providers	1	2	3	4	5
• K-22. Event Planning.....	1	2	3	4	5
• K-23. Advertising Media.....	1	2	3	4	5
• K-25. Social Media Management.....	1	2	3	4	5
• K-26. Digital Marketing Management.....	1	2	3	4	5
• K-27. Client Relationship Management.....	1	2	3	4	5
• K-28. Crisis Communications Management.....	1	2	3	4	5

Total for Domain 5:

Management

NEEDED LEVEL
(circle one)

VI-A. Supervise marketing and support staff.....	1	2	3	4	5
VI-B. Communicate across department and/or branch offices.....	1	2	3	4	5
VI-C. Effectively use information management systems	1	2	3	4	5
VI-D. Develop an internal communications program	1	2	3	4	5
VI-E. Conduct marketing and business development training for staff.....	1	2	3	4	5
VI-F. Promote a firm-wide business development culture	1	2	3	4	5
VI-G. Create professional development plan for staff.....	1	2	3	4	5
VI-H. Recruit and train marketing personnel.....	1	2	3	4	5
VI-I. Work with HR departments on recruiting programs.....	1	2	3	4	5
VI-J. Evaluate marketing processes to improve efficiency	1	2	3	4	5
VI-K. Comply with business and accounting principles	1	2	3	4	5
VI-L. Effectively use and maintain customer relationship management (CRM) system.....	1	2	3	4	5
VI-M. Develop/monitor marketing and business development KPIs.....	1	2	3	4	5

Knowledge areas that are drawn upon to support this domain include:

- **K-04.** Strategic Plan Components..... **1** **2** **3** **4** **5**
- **K-05.** Business Plan Components
- **K-06.** Marketing Plan Components.....
- **K-07.** Business Operation Financials
- **K-08.** Marketing Budget Management.....
- **K-09.** Organizational and Management Principles
- **K-10.** Appropriate Communication Techniques
- **K-11.** Contact Management Systems
- **K-12.** Federal, State, and Local Regulations.....
- **K-13.** Industry Terminology
- **K-16.** Contract Components
- **K-17.** Negotiation Techniques
- **K-18.** Management of Third-party Service Providers
- **K-19.** Personnel Management.....
- **K-20.** Training and Motivational Techniques.....
- **K-21.** Group Dynamics and Team-Building Principles.....
- **K-24.** Business Etiquette and Protocol.....
- **K-27.** Client Relationship Management.....

Total for Domain 6:

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.

