BLUEPRINTS

Guides for Marketing and Business Development Departments in the A/E/C Industry

www.smps.org
About the Career Pathways Task Force

The 2010–11 SMPS National Board, under the leadership of President Carolyn Ferguson, FSMPS, CPSM, established the Career Pathways Task Force to provide marketers and business developers with tools to advance their careers and to advocate for the value of marketing in the A/E/C industry.

Task Force Goals:

1. Identify career paths for professional services marketers and business developers.
2. Define and recommend position descriptions for marketers and business developers at all levels in the A/E/C industry.
3. Create tools and resources to assist individuals in self-evaluation, professional development planning, and charting of a personal career path.
4. Make tools available to members in Summer 2011.

Task Force Members:

Chair
- Chris D. Rickman, CPSM, Principal/Business Manager, Zahl-Ford Inc.

Committee
- H. Lee Jarboe, CPSM, Director of Client Services, McCarthy Building Companies Inc.
- Daron J. Bennett, CPSM, Director of Marketing, Hoefer Wysocki Architects
- Sara L. Stevens, Business Development Coordinator, Bohler Engineering
- Scott R. Milder, CPSM, Principal, SHW Group
- Craig S. Galati, AIA, President, Lucchesi Galati
- Marie E. O’Quinn, CPSM, Marketing Consultant/Project Manager, MARKETLINK
- Thomas E. Smith Jr., AICP, FSMPS, CPSM, President, BonTerra Consulting

National Board Liaison
- Brad Thurman, P.E., FSMPS, CPSM, Principal & Chief Marketing Officer, Wallace Engineering

Acknowledgments

SMPS wishes to acknowledge the work of Sally A. Handley, FSMPS, and Sharyn Yorio, FSMPS, CPSM, whose research for Charting Your Career Path (SMPS: 2001) provided a foundation for the job descriptions and recommendations on the following pages.

© Society for Marketing Professional Services, www.smps.org. All rights reserved.
The Society for Marketing Professional Services designed Blueprints to work in two ways. For the individual marketing and business development professional, the guides are structured to shepherd you through your career path, help advocate for you and your position in your firm, and provide self-assessment tools to help you succeed. For A/E/C firms, the guides will assist in planning an effective marketing structure for your business and in recruiting and retaining talented, productive, satisfied employees.

Inside you will find:

- **Plans: Ideas on Structuring Your Marketing and Business Development Department**, to explore how marketing and business development could be structured in your firm
- **Details: Job Descriptions for Marketing and Business Development Professionals**, to help you write and tailor appropriate position descriptions for marketing/BD staff
- **Elevations: An Assessment Tool for Careers in A/E/C Marketing and Business Development**, to help the professional services marketer or business developer define where you are on your career path and what you need to master to advance your career
- **Specifications: Interview Questions for Marketing and Business Development Candidates**, to help you evaluate candidates

The information contained here can lead to a robust conversation about your firm’s marketing and business development program, the role of marketing in a successful A/E/C business, and the professional support your firm needs to build business.

How to Use Blueprints

Please use this document as a guide. How you should apply the information presented here to your firm will vary depending on several factors including, but not limited to:

- the structure of your firm
- the services your firm offers
- the size of your firm (determined by the number of employees or annual revenue generated)
- the number of offices supporting your business
- if you work for a firm with multiple offices, whether marketing is centralized or decentralized
- the business development model your firm has in place (seller or seller/doer)
- whether your firm separates marketing and business development functions

The creators of Blueprints adopted a broad view to make the information applicable to wide range of professionals and A/E/C firms. Please take this into consideration when weighing the applicability of the recommendations to your role and your firm.

Making the Distinction Between Business Development and Marketing

SMPS defines **business development** and **marketing** as follows:

**Business Development:** The process of identifying opportunities, developing relationships, and securing profitable work for the firm.

**Marketing:** The process of creating awareness for the firm and providing support for business development activities.

Throughout Blueprints, business development and marketing functions are separated in order that they may be fully explored in the context of establishing departments, defining jobs, and evaluating skill mastery. SMPS recognizes that some firms do not make a distinction between business development and marketing.
Additional Resources from SMPS

SMPS National offers these resources to assist you in staffing and training your marketing and business development team or planning your own career in professional services marketing.

**2009 Marketing Salary and Expense Survey**
Commissioned by the SMPS Foundation, this study is the largest salary and expense survey of marketing and business development professionals available in the design and construction industry. A sample of 1,153 respondents representing 774 offices participated in the survey. The full survey includes compensation tables for Owner/Principal, Chief Marketing Officer, Marketing Management, Business Development Management, PR/Marketing Communications Management, Business Development/Sales, and Marketing/Business Development Coordination. Purchase the full survey containing all the tables or purchase individual compensation tables separately from the study. For details and to purchase the survey, go to Shop on the SMPS National web site at [www.smtp.org](http://www.smtp.org).

**Career Center**
The SMPS Career Center connects A/E/C firms seeking to fill marketing and business development positions with qualified professionals. Employers may post open positions in the Career Center and review resumes of available candidates. Professionals seeking employment may review open positions, post their resumes, and set up job alerts. For more information, visit [www.smtpcareercenter.org](http://www.smtpcareercenter.org).

**Certified Professional Services Marketer Program**
Based on the Domains of Practice for Professional Services Marketers, the Certified Professional Services Marketer (CPSM) program measures a candidate’s experience and ability to apply marketing and business development knowledge in six core areas. To earn the CPSM designation, candidates must meet educational and experience requirements, pass a rigorous written examination, and pledge to abide by the Code of Ethics. Successful candidates are recognized as having the experience to generate profitable business in the architectural, engineering, and construction marketplace. To learn more, visit [www.smtp.org/Certification](http://www.smtp.org/Certification).

**Professional Development**
SMPS works with industry leaders in business development, marketing, and management to offer educational programs at fundamental, intermediate, and master’s levels. These programs are designed to expand the individual’s knowledge about business development and marketing and to provide valuable skills that equip the individual to build business for the firm. Information about and registration for upcoming programs are available at [www.smtp.org/Education](http://www.smtp.org/Education).

SMPS National programs are available to firms to bring in house for customized staff training. Call the Education Department at 800.292.7677, x228, to discuss your firm’s programming needs.

**SMPS University: Leadership Advancement Program**
*In Partnership with the Robert H. Smith School of Business at the University of Maryland*

During this program, participants will gain the critical business management knowledge to increase their firms’ profitability and the leadership skills to establish themselves as respected leaders, inside and outside the firm. The curriculum is designed especially for marketers and business developers who strive to support senior management with essential business information, guide the strategic direction of their firms, and advance to leadership positions. The program integrates marketing, BD, and service management principles into the strategic plan of the professional services firm, clearly illustrating their crucial roles in the business model of a successful practice. Learn more and register at [www.smtp.org/smps_university](http://www.smtp.org/smps_university).

More resources for professional and staff development can be found under Resources on the SMPS National web site at [www.smtp.org](http://www.smtp.org).
PLANS: Ideas on Structuring Your Marketing and Business Development Department

The creators of Blueprints adopted a broad view to make the model marketing departments below applicable to a wide range of A/E/C firms. Please take this into consideration when weighing the applicability of the recommendations to your firm.

When planning the structure of your marketing and/or business development department(s), consider the impact of the following:

- In a firm with multiple offices, marketing efforts may be centralized in a main office or de-centralized in satellite office locations. For multiple-office firms, it is recommended that a Chief Marketing Officer oversee marketing/business development in all the offices.
- The main office may not be the firm’s largest office.
- Firm size can be adjusted based on revenue.
- In firms of fewer than 20 employees, a Coordinator may have other duties outside of marketing/business development (example: office management).
Defining the Roles

**Business Development:**
The process of identifying opportunities, developing relationships, and securing profitable work for the firm.

**Marketing:**
The process of creating awareness for the firm and providing support for business development activities.

Universal Skill Set for Marketers and Business Developers

A successful marketer or business developer possesses the following characteristics, in addition to the knowledge and skills outlined in the following job descriptions:

- Self starter
- Excellent writing skills
- Excellent presentation skills
- Excellent interpersonal relationship skills
- Passionate about the client or pursuit
- Able to see the big picture
- Works well under pressure
- Desires to connect the vision of the company and his/her job
- Possesses a sense of ownership

Details:
Job Descriptions for Marketing and Business Development Professionals

We want to hear from you!
Do you have a suggestion? A success story? A question? Please share your feedback on Blueprints with SMPS by sending a message to blueprints@smps.org.
We look forward to hearing from you.
Marketing Assistant (Administrator)

In smaller firms, these duties may be performed by a Receptionist or Intern.

Responsibilities:
• Clerical for Marketing Department
• Binding
• Duplication
• Maintain resumes, boilerplate information, project descriptions, photographs, etc.
• Update social media information
• Might update Web site information

Skill Set:
• Proficient with word processing software
• Proficient with desktop publishing software
• Organizational skills, multi-tasking
• Detail oriented
• Knowledge of database concepts
• Good time-management skills
• Ability to work well with people

Education/Certification Requirements:
• May hold an associate’s or bachelor’s degree; no degree required

Career Path Options: Marketing Coordinator

Marketing Coordinator

In smaller firms, these duties may be performed by the Receptionist.

Responsibilities:
• Plan marketing activities
• Delegate and coordinate the work of other personnel
• Write resumes, boilerplate information, project descriptions, etc.
• Work with technical staff to develop proposal sections and scopes of work
• Update social media information
• Update Web site information
• Coordinate specialized consultants (photographers, PR, etc.)
• Plan and coordinate special events
• Research target markets
• Actively involved in professional and community organizations, including SMPS

Skill Set:
• Proficient with word processing software
• Proficient with desktop publishing software
• Organizational skills, multi-tasking
• Detail oriented
• Knowledge of database concepts
• Excellent time management skills
• Basic understanding of A/E/C industry terminology and procedures
• Working knowledge of marketing databases and proposal resources files
• Understanding of basic marketing principles

Education/Certification Requirements:
• Bachelor’s degree with one to three years of experience recommended
• Without a degree, three to five years of relevant A/E/C experience required
• Recommended: Preparation to earn the Certified Professional Services Marketer (CPSM) certification

Career Path Options: Marketing Manager, Associate
Marketing Manager

In larger firms, this may be a member of firm management, often at the associate level. In smaller firms, these duties may be performed by the Office Manager or a Principal.

Responsibilities:
- Manage and mentor subordinate marketing staff
- Represent the firm to clients, peer organizations, and business associates
- Make commitments on behalf of firm only under previously established guidelines
- Establish programs to accomplish marketing-related aspects of the corporate mission
- Assist with marketing budget development
- Assist with marketing plan development
- Manage client-contact program
- Initiate and develop contact with potential clients and work with principals to secure new clients and projects
- Manage qualification, proposal, and presentation activities
- Work with technical staff to develop proposal sections and scopes of work
- Responsible for overall marketing staff training and marketing-related technical staff training
- Manage collateral materials development, public relations and advertising programs, corporate identity development and implementation, special events, direct-mail programs, and market research activities
- Actively involved in professional and community organizations, including SMPS

Skill Set:
- Excellent knowledge of marketing fundamentals
- Good mentoring/teaching abilities and leadership/managerial skills
- Comprehensive knowledge of firm’s practice, clientele, goals, policies, and procedures
- Highly competent in marketing theory and practice
- Basic understanding of A/E/C industry terminology and delivery methods
- Excellent organizational skills
- Persistent
- Ability to prioritize

Education/Certification Requirements:
- Bachelor’s degree with 4 to 7 years of experience recommended
- Without a degree, 6 to 10 years of relevant A/E/C experience required
- Recommended: CPSM certification (or pursuit of certification)

Career Path Options: Marketing Director, Business Development Manager, Principal

Marketing Director

In larger firms, this will be a member of firm management; typically holds at least an associate-level position and is often a Vice President or a Principal. In smaller firms, these duties will be performed by a Principal.

Responsibilities:
- Responsible for firm’s overall marketing program
- Establish marketing policies and procedures
- Determine marketing objectives to meet firmwide goals
- Influence other aspects of firm direction and operations, such as production, finance, administration, and human resources
- Direct the preparation of the marketing plan
- Represent the firm to clients, peer organizations, and business associates
- Make commitments on behalf of the firm
- If a registered professional, may devote some time to project-related functions, especially in smaller firms
- Work with technical staff to develop proposals and scopes of work and estimate fees
- Plan and schedule marketing support activities to ensure that goals are accomplished and deadlines are met
- Direct training of marketing staff and technical staff on marketing-related issues
- Decide when and why to use specialized consultants, such as advertising, public relations, or graphic design firms
- Maintain a high profile in professional and community organizations, including SMPS

Skill Set:
- Thorough understanding of A/E/C industry terminology and procedures
- Professional demeanor that enables the person to interact with the highest levels both inside and outside the firm
- Excellent leadership/managerial and mentoring/teaching skills
- Basic business management skills
- Thorough knowledge of marketing principles
- By example, sets a standard of professional competence
- Thorough knowledge of marketing databases and proposal resources files
- Good organizational skills
- Able to work without close supervision and in a team environment
- Persistent
- Good time-management skills; able to prioritize activities

Education/Certification Requirements:
- Bachelor’s degree and 5 to 8 years of experience recommended
- Without a degree, 8 to 12 years of relevant A/E/C experience required
- CPSM certification required
- Recommended: Participation in the SMPS University Leadership Advancement Program

Career Path Options: Chief Marketing Officer, Business Development Director, Principal
Business Development Manager

In larger firms, this may be a member of firm management, often at the associate level. In smaller firms, these duties may be performed by a Principal.

Responsibilities:
• Seek business opportunities for firm; could be market specific depending on firm size
• May make commitments for firm with direction from superiors
• Spend majority of time outside the firm making contacts
• Track BD opportunities via CRM
• Research and gather information on potential clients and projects
• Schedule meetings with new/existing clients to discover project information
• Develop and maintain strong business network
• Participate in client organizations
• Work with technical staff to develop proposals and scopes of work and estimate fees
• Actively involved in professional and community organizations, including SMPS

Skill Set:
• Comprehensive knowledge of firm’s practice, clientele, goals, policies, and procedures
• Basic understanding of A/E/C industry terminology and delivery methods
• Excellent organizational skills
• Persistent
• Follow through in a consistent manner

Education/Certification Requirements:
• Bachelor’s degree with 4 to 7 years of experience recommended
• Without a degree, 6 to 10 years of relevant A/E/C experience required
• Recommended: CPSM certification (or pursuit of certification)

Career Path Options: Business Development Director, Principal

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We look forward to hearing from you.

Business Development Director

In larger firms, this will be a member of firm management; typically holds at least an associate-level position and is often a Vice President or Principal. In smaller firms, these duties will be performed by a Principal.

Responsibilities:
• Organize, plan, schedule, and manage the firm’s sales efforts
• Determine sales objectives to meet firmwide goals
• Manage client satisfaction program
• Influence other aspects of firm direction and operations, such as production, finance, administration, and human resources
• Represent the firm at the highest level to clients, peer organizations, and business associates
• Make commitments on behalf of the firm
• Work with technical staff to develop proposals and scopes of work and estimate fees
• Direct training of marketing staff and technical staff on BD-related issues
• Maintain a high profile in professional and community organizations, including SMPS

Skill Set:
• Thorough understanding of A/E/C industry terminology and procedures
• Professional demeanor that enables the person to interact with the highest levels both inside and outside the firm
• Excellent leadership/managerial and mentoring/teaching skills
• Basic business management skills
• By example, sets a standard of professional competence
• Good organizational skills
• Able to work without close supervision and in a team environment
• Persistent
• Follow through in a consistent manner

Education/Certification Requirements:
• Bachelor’s degree and 5 to 8 years of experience recommended
• Without a degree, 8 to 12 years of relevant A/E/C experience required
• CPSM certification required
• Recommended: Participation in the SMPS University Leadership Advancement Program

Career Path Options: Chief Marketing Officer, Principal
Chief Marketing Officer

This individual should have an executive role in the company, often a Vice President or Principal. In smaller firms, these duties will be performed by a Principal.

Responsibilities:

- Develop comprehensive annual business and marketing plans, including targets and metrics, based on strategic planning by principals
- Develop marketing strategies and serve as primary strategy advisor to the principals
- Ensure alignment of capture plans with corporate strategies
- Foster communication between individuals to ensure information distribution and resource utilization are capitalizing on the strengths of the firm
- Maximize marketing effectiveness and efficiency by gathering and disseminating best practices throughout the organization
- Monitor and control firmwide marketing activities, expenses, results, and other metrics; perform assessments on business acquisition performance and effectiveness
- Conduct strategic research in support of the firm’s designated market sectors and explore new growth markets
- Develop and implement strategies to expand existing market penetration and enter new markets
- Perform benchmarking in designated markets, including competition, strategic intelligence, and market and industry trends
- Supervise the marketing support and business development staff in all offices
- Support the growth of those involved in business acquisition by mentoring and coaching
- Approve budgets and allocate funds for target clients’ conferences, printed material, etc. where the strategy and goals reflect the firm’s vision and strategic position
- Lead all go/no-go decisions; assess each potential pursuit in regard to its ability to meet the firm’s strategic positioning and goals
- Work with appropriate team members to create and execute a winning strategy for all key chases; ensure teams have identified the appropriate benefits and differentiators
- Ensure all materials are appropriately focused on client benefits and differentiators, while consistent with the firm’s promotional identity

Skill Set:

- Thorough understanding of A/E/C industry terminology and procedures
- Professional demeanor that enables the person to interact with the highest levels both inside and outside the firm
- Excellent leadership/managerial and mentoring/teaching skills
- Good organizational skills
- Persistent
- Follow through in a consistent manner

Education/Certification Requirements:

- Master’s degree and 15+ years of experience recommended
- CPSM certification required
- Recommended: Participation in the SMPS University Leadership Advancement Program

Career Path Options: Principal
Principal-in-Charge of Marketing

This individual is a firm owner or member of the highest level of firm management.

Responsibilities:

• In larger firms, is largely responsible for policy making, management overview, and monitoring marketing program progress
• Delegate day-to-day responsibility for marketing program and activities to lower levels of management
• Work with peers to establish firm’s long-term business goals and dovetail marketing plan to achieve goals
• Has absolute authority on marketing issues within framework of normal operations
• Has a major influence on key decisions affecting the firm
• Plan, organize, and direct activities of subordinate managers
• Evaluate results of marketing operation, including performance of peers in marketing functions
• Work with other members of ownership/management group to achieve firmwide goals
• Recommend adjustments to “non-marketing” operations to ensure optimum responsiveness to business/marketing plan goals
• Is the creative force behind the firm’s strategic plan
• Set marketing policy and influence other firm policies
• Is a key representative of the firm to clients and the community
• In smaller firms, may participate in hands-on marketing activities
• Is capable of closing deals
• Is a credit to the firm in presentations and overall client relations
• Is actively involved in high-profile positions in professional and community organizations
• Participate in relevant professional development annually and is a member of professional and civic organizations, including SMPS

Skill Set:

• Highly knowledgeable in general business operations, marketing, management; if the person holds a technical degree, is also proficient in technical practice
• Thorough understanding of A/E/C industry terminology and procedures
• Professional demeanor that enables the person to interact with the highest levels both inside and outside the firm
• Excellent leadership/managerial and mentoring/teaching skills
• Good organizational skills
• Persistent
• Follow through in a consistent manner

Education/Certification Requirements:

• Master’s degree and 15+ years of experience recommended
• CPSM certification required
• Recommended: Participation in the SMPS University Leadership Advancement Program

Career Path Options: Chief Executive Officer, Chief Operating Officer
The following analysis will help you to conduct a personal inventory of your knowledge and skills for your current job, identifying areas where you are strong or need improvement based on this scale:

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>No understanding, skill, or experience</td>
<td>Some understanding, skill, or experience</td>
<td>Working understanding, skill, or experience</td>
<td>Strong understanding, skill, or experience</td>
<td>Mastery understanding, skill, or experience</td>
</tr>
</tbody>
</table>

Once you have completed the ratings for “Present Level” and “Needed Level,” add your totals for the position. Subtract the Present Level from the Needed Level to determine your level of competency in the position. You can set your professional development goals by focusing on the knowledge and skills where you have the highest score differences.

To determine specific knowledge areas and skill sets where you have gaps, highlight the items where you have the greatest difference between Present Level and Needed Level.

It is intended that progression along the career path from one position to the next will be based upon “Mastery understanding, skill, or experience” of the previous position’s knowledge areas and skill sets. Thus, knowledge areas and skill sets are not repeated for each position but assumed to be mastered and incorporated into the next position level.

### Marketing Assistant (Administrator)

#### Knowledge Areas:
- Architectural and engineering terminology
- Resources and products for SOQ/proposal production, including printing and binding
- RFQ/RFP criteria and decision/selection process
- Web page design
- Records management systems for project, personnel, consultant, proposals, and/or visual information
- Computerized database management systems

#### Skill Set:
- Desktop publishing
- Produce SOQs/proposals, including typing, editing, graphics, reproduction, binding, and mailing, to ensure that all RFQ/RFP criteria are met
- Organize project photography
- Maintain systems to extract, categorize, and retrieve information related to consultants, personnel, projects, prior proposals, boilerplate, visuals, mailing lists, and promotional items
### Marketing Coordinator

#### Knowledge Areas:

<table>
<thead>
<tr>
<th>Knowledge Area</th>
<th>Present Level (click one)</th>
<th>Needed Level (click one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market research data-gathering techniques</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Sources of social, cultural, economic, federal, state, and local regulatory information</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Newspapers, magazines, and other publications related to target markets</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Federal, state, and local laws and regulations</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Federal, state, and local forms and guidelines</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Scheduling and tracking systems for individual proposal elements and status</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Graphic design and production</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Managing activities of specialized consultants</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Visual aids for use in presentations</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Communicating the firm’s image and objectives</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Advertising media</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Presentation software</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Relevant industry/media/civic events</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Sources for a press list</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Format and content of promotional publications</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Production and use of photography</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Business/social etiquette and protocol</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Awards programs, submission guidelines, and deadlines</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Special events planning</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
</tbody>
</table>

#### Skill Set:

<table>
<thead>
<tr>
<th>Skill Set</th>
<th>Present Level (click one)</th>
<th>Needed Level (click one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitor sources of industry-related market information</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Gather research data related to past, current, and prospective markets and relevant corporate experience</td>
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<td>2 3 4 5</td>
</tr>
<tr>
<td>Manage the preparation and draft the content of proposals, SOQs, letters of interest, and responses to inquiries</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Prepare or assemble written and visual information for presentations</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Participate in media events, civic and professional group meetings, client industry trade associations, and community and industry activities to enhance the image of the company</td>
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<td>2 3 4 5</td>
</tr>
<tr>
<td>Write press releases</td>
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<td>2 3 4 5</td>
</tr>
<tr>
<td>Prepare and coordinate awards competition entries</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
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<tr>
<td>Coordinate firm special events</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Attend professional development activities</td>
<td>2 3 4 5</td>
<td>2 3 4 5</td>
</tr>
</tbody>
</table>
# Marketing Manager

**Knowledge Areas:**

<table>
<thead>
<tr>
<th>Present Level (click one)</th>
<th>Needed Level (click one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No understanding, skill, or experience</td>
<td>Some understanding, skill, or experience</td>
</tr>
<tr>
<td>Market research techniques for qualitative and quantitative data analysis</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>SWOT of firm and personnel</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Elements of strategic plans, marketing plans, and business plans</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Techniques for facilitating the planning process</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Basic management principles</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Elements of an internal marketing audit</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Methodologies for budget development</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Basic accounting principles</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Cost tracking and control procedures</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Strategic planning techniques</td>
<td>2 3 4 5</td>
</tr>
<tr>
<td>Interpretation and application of market research results to client and business development, prospect information sources</td>
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<td>Trade show event management</td>
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<td>Technical and journalistic publication writing techniques</td>
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<tr>
<td>Tailoring promotional materials to a target audience</td>
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<td>Printing; copyright laws and authorized use of visuals</td>
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<td>Information delivery methods</td>
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<td>Techniques to qualify, interview, and select vendors and consultants</td>
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<td>Staff training techniques</td>
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<td>Leadership and team-building principles</td>
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<tr>
<td>Evaluation techniques for design/production efficiency and quality control</td>
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<td>No understanding, skill, or experience</td>
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<td>Monitor legislative and/or regulatory activities that could affect the need for services</td>
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<td>Participate in creation of the marketing plan and budget</td>
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<td>Manage implementation of the firm’s marketing plan</td>
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<td>Manage the marketing budget</td>
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<tr>
<td>Conduct an RFQ/RFP review and/or strategy session to analyze a potential client in terms of target market, project size, probability of selection, and timing in order to recommend a go/no-go decision</td>
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<tr>
<td>Develop strategies to produce SOQs/proposals</td>
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<td>Develop a presentation strategy, structure, and style and assist in selecting a presentation team</td>
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<td>Coordinate/coach presentation rehearsals</td>
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<td>Conduct a post-presentation follow-up internally and with the prospective client</td>
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<tr>
<td>Develop image and corporate identity</td>
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<tr>
<td>Manage promotional program expenditures to ensure consistency with the budget</td>
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<tr>
<td>Develop an advertising plan to support the firm’s marketing program objectives</td>
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<tr>
<td>Write journal articles and/or newsletters to generate publicity for the firm</td>
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<tr>
<td>Create written/print and electronic promotional materials consistent with an overall marketing and business plan and update on a regular basis</td>
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**Skill Set:**

We want to hear from you!

Do you have a suggestion? A success story? A question? Please share your feedback on Blueprints with SMPS by sending a message to blueprints@smps.org.

We look forward to hearing from you.
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<thead>
<tr>
<th>Knowledge Areas:</th>
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<tbody>
<tr>
<td>Methods for forecasting trends</td>
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<tr>
<td>Cost/benefits for various marketing techniques</td>
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<tr>
<td>Procedures to evaluate the effectiveness of promotional activity</td>
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<td>Individual and group dynamics</td>
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<td>Techniques for resource management and costs/benefit analysis</td>
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<tr>
<td>Establish methodologies for collecting and evaluating information, from within the firm and from external sources, on potential teaming and business opportunities</td>
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<tr>
<td>Monitor social, demographic, cultural, and economic trends for broad-based marketing and business implications</td>
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<tr>
<td>Design, implement, and/or evaluate research studies of markets, competitors, and/or client prospects</td>
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<td>Select target markets based on research results</td>
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<td>Create a marketing budget</td>
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<td>Conduct post-award debriefings with prospects regardless of outcome and revise business development and SOQ/proposal strategies as appropriate</td>
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<tr>
<td>Develop systems to extract, categorize, and retrieve information related to consultants, personnel, projects, prior proposals, boilerplate, visuals, mailing lists, and promotional items</td>
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<tr>
<td>Conduct marketing-related workshops/training for the principals and technical staff</td>
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<td>Select, manage, and direct the activities of specialized consultants</td>
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<td>Create business development guidelines and strategies for pursuing clients or projects</td>
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<tr>
<td>Develop, implement, and monitor contact management process</td>
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<tr>
<td>Initiate, follow up, and maintain contact with current and past clients to track client satisfaction and initiate corrective action, if needed</td>
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<td>Develop corporate entertainment strategies to ensure maximum exposure</td>
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<td>Develop, implement, and mentor effectiveness of business development efforts for hit rate and return on investment</td>
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**Chief Marketing Officer**

**Knowledge Areas:**
- Promoting and rewarding high-quality team performance and effective client service
- Developing an internal communications program to facilitate information sharing within the firm; informing and involving the principals and technical staff regarding marketing efforts

**Skill Set:**
- Monitor information, resources, and organizational expenditures to ensure consistency with budget
- Recruit and keep star performers
- Build high-performance teams linked to key client groups
- Direct crisis communications/public relations for the firm in a crisis situation
- Refine the design/production process to improve efficiency and quality control

**Principal-in-Charge of Marketing**

**Knowledge Areas:**
- Insurance/professional liability
- Human resources
- Accounting principles
- Participate in and contribute to the firm’s strategic planning process and business plan development
- Report to the firm’s management group on marketing and business development activities and their alignment with strategic initiatives

**Skill Set:**
- Negotiate and execute contracts
- Manage the marketing and business development teams to execute firm strategies
- Public speaking; may serve as the public face of the firm
The Society for Marketing Professional Services designed Specifications to work in two ways. For A/E/C firms, Specifications will assist you in your candidate search for marketing and business development personnel. For the individual marketing and business development professional, Specifications can be used as a guide in preparing for your interview with potential employers. In either case, this is to be used as a resource to generate discussion ideas when interviewing. It is intended for questions to be selected based on the position available and the firm’s specific needs and culture. The selected questions should be discussed with your Human Resources Department prior to use to confirm appropriateness with state and federal hiring laws.

SMPS recognizes that some firms do not make a distinction between business development and marketing and consider them as one function. For this reason, the Candidate Interview Questions are split into four categories representing the skill sets that are critical for success in both marketing and business development activities:

- **Communication Skills**: Writing, verbal, graphic
- **Technical Proficiency**: Software knowledge, design experience, market research
- **Organization/Coping Skills**: Strategic capabilities, teamwork, stress management
- **Career Goals**: Short and long term

**Introductory Questions**

These questions can be used to start the interview and to gauge the candidate’s ease of communicating in a new setting.

- What were your expectations of your last job and to what extent were they met?
- What were the responsibilities of your last job?
- What major challenges and problems did you face? How did you handle them?
- What have you learned from your mistakes?
- What did you like or dislike about your previous job?
- Which activities were most/least rewarding?
- What was the biggest accomplishment/failure in this position?
- What do you expect from a supervisor?
- Have you ever had difficulty working with a manager? If so, describe what you did to improve the relationship.
- Who was your best boss and who was the worst?
- Why are you leaving your job?
- If people who know you were asked why you should be hired, what would they say?
- What interests you about this job?
- Why do you want this job?
- What can you do for this company?
- What do you know about this company?
- What challenges are you looking for in a position?
- What can you contribute to this company?
- Are you willing to travel?
- How would you describe good customer service?
- Is there anything I haven’t told you about the job or company that you would like to know?
- What licenses/certifications do you have?
- Have you ever attended industry seminars? Which ones?
- Do you belong to any professional associations? Why/why not?
Communication Skills

Pay attention to how the candidate interacts with people such as the receptionist. This observation, in addition to your own observations of the candidate’s level of comfort with communication during the interview, is key.

You can observe much about the candidate’s communication style during the interview. How articulate is the candidate? How clearly does the candidate communicate? How easily does the candidate select words to use to answer questions? Notice the non-verbal communication and the facial expressions as well. Does the candidate radiate sincerity and energy? Is the candidate genuinely interested in your company and the open job?

- How would you describe yourself?
- You attend a weekly staff meeting with your supervisor. How have you ensured, in the past, that the information you have received is communicated to your reporting staff and coworkers?
- Information you believe to be untrue or confidential has reached you via the grapevine. What actions have you taken in the past to take care of situations such as this when communication is out of control?
- Give me an example, from your past work experiences, about a time when you were part of a project or team and you never knew what was happening with the other action items or participants. How did you handle this situation?
- Rate your communication skills on a scale of 1 to 10 with 10 representing excellent communication skills. Give me three examples from your past work experiences that demonstrate the selected number is accurate.
- Describe the work environment or culture and communication style in which you experience the most success.
- Describe a few key factors about the communication within an organization that must be present for you to work most effectively.
- How often do you believe it is necessary to withhold information from staff members who report to you? Would you say you do this regularly, not often, or never? Under what circumstances do you limit communication, in your experience?
- When you have had a boss, in the past, who fails to adequately communicate with you, how have you handled this?
- When you have entered a new workplace in the past, describe how you have gone about meeting and developing relationships with your new coworkers, supervisors, and reporting staff.
- Give me an example of a great idea you’ve had.
- Describe three examples of leadership that I would find on your resume.
- What would you do if a client asked you to stretch the truth in a press release or press conference?
- Do you have experience with a diverse client base and diverse media? If so, describe the strategies you have used to achieve success.

Technical Proficiency

- Software literacy (example: Adobe Creative Suite—InDesign, PhotoShop, Illustrator, Fireworks)
- Database creation/management
- Describe your technical skills.
- What is your definition of competency? How important is it as a professional?
- Describe your computer literacy and the software programs you use regularly.
- How do you communicate technical information when required?
- How important is it to take extra technical training?
- When was the last time you gained new technical skills for a project and how did it affect your performance?
- How would you link technical development with job performance?
- What things hold you back as a marketing/business development person?
- How do you rate your knowledge of technology?
- How would you photograph a project site?
- What kind of a typography background do you have?
- Can you explain ‘kerning’ to me?
- Have you ever worked with standards before? Do you understand why they’re important?
- What programming skills do you have?

Organization/Coping Skills

- What is your greatest weakness? Your greatest strength?
- How will your greatest strength help you perform?
- How would you describe yourself?
- How many hours do you normally work? Do you take work home?
- How would you describe the pace at which you work?
- How do you handle stress and pressure?
- Are you self-motivated?
- What are you passionate about?
- What are your pet peeves?
- What do people most often criticize about you?
• If you could relive the last 10 years of your life, what would you do differently?
• Do you prefer to work independently or on a team?
• If you know your boss is 100% wrong about something, how would you handle it?
• Describe a difficult work situation/project and how you overcame it.
• Give an example of a goal you reached and tell me how you achieved it.
• Give an example of a goal you didn’t meet and how you handled it.
• Describe a stressful situation at work and how you handled it.
• Have you been in a situation where you didn’t have enough work to do?
• Have you ever made a mistake? How did you handle it?
• Describe a decision you made that was unpopular and how you handled implementing it.
• Did you ever postpone making a decision? Why?
• Have you gone above and beyond the call of duty? If so, how?
• When you have worked on multiple projects, how did you prioritize?
• How did you handle meeting a tight deadline?
• What do you do when your schedule is interrupted?
Give an example of how you handle it.
• Have you handled a difficult situation with a co-worker? How?
• Share an example of how you were able to motivate employees or co-workers.
• Do you listen well? Give an example of when you did or when you didn’t listen well.
• Have you handled a difficult situation with a supervisor? How?
• Give me an example of something you’ve done in previous jobs that demonstrates your willingness to work hard.
• Tell me about an accomplishment of yours that you feel is unique.
• Tell me about a time you handled a difficult situation where you were able to establish a rapport with a person others describe as “difficult.”
• Describe a time when politics at work affected your job. How did you deal with it?
• Describe for me how you have “made your own luck.”
• Tell me about your greatest career achievements. Why did you pick those examples?
• Describe the most difficult change you have had to make in your professional career. How did you manage the change?

• Tell me what you did with your supervisor when the project failed to meet deadlines.
• Give me an example of a situation when you were faced with a shared decision.
• Describe how you managed that situation.
• Describe a time where you were faced with problems or stressful situations that tested your coping skills. What did you do?

Career Goals

• What are you looking for in your next job? What is important to you?
• What are your professional goals for the next 5 years/10 years?
• How do you plan to achieve those goals?
• What are your salary requirements, both short term and long term?
• How long do you expect to remain employed with this company?
• What will you do if you don’t get this position?
• What is your ideal position and work environment? What has worked best for you in the past?
• What is it that’s causing you to make this move (unless the answer is obvious)?

Post-Interview

(15 – 20 Minutes)

Tell me IN WRITING why you think you’re the best person for this job.

1With permission, several of the questions included in this section came, or were paraphrased, from the publication High Impact Interview Questions: 701 Behavior-Based Questions to Find the Right Person for Every Job, AMACOM Books, 2006.
Management-Level Questions

• How do you evaluate success?
• What do you find are the most difficult decisions to make?
• How do you motivate personnel who report to you?
• How do you go about giving your staff critical feedback on their projects/work?
• Have you ever implemented new procedures in or introduced new concepts to your department? How did you communicate them? Was your communication effective? How do you know it was effective?
• How many people reported to you in your last position?
• How do you establish yourself when you’re assuming a new management position?
• How closely do you tend to monitor your employees’ work?
• How do you get people who report to you to give you their best performance?
• What techniques have you used to bring an underperforming employee up to speed?
• There are a number of different management styles, from authoritarian to team oriented. In your own experience, which management style do you find to be the most effective, and why?
• What’s your opinion of the value of training at all levels of the organization? Describe training programs that you either initiated or participated in.
• What interests you about business analysis and strategic planning?
• Do you have any experience in an operations area such as human resources, insurance claims, contracts, or customer service?

For Candidates: Questions to Ask Potential Employers

• What do you least like about being in business development?
• What interests you most about this business development position?
• What is more important, a quality product or excellent customer service?
• What makes you a good business development person?
• How much client contact have you had?
• Which of your strengths are particularly important (architecture/engineering/construction)?

Business Development Position Questions

• Are you comfortable making cold calls?
• Have you consistently met your business development goals?
• Do you prefer a long- or short-term pursuit cycle?
• How did you land your most successful client/project?
• What are your thoughts regarding the effectiveness of a non-technical business development person versus a technical business development person?
• What do you find most rewarding about being in business development?
• What do you know about this company and its current client base? Describe how you would approach business development activities if you were to be selected for this position.

We want to hear from you!
Do you have a suggestion? A success story? A question? Please share your feedback on Blueprints with SMPS by sending a message to blueprints@smps.org. We look forward to hearing from you.