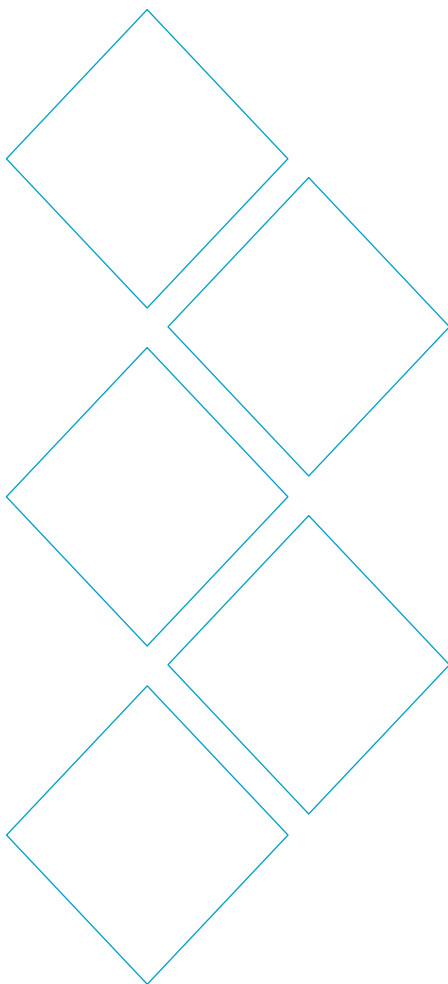




The
NISM Social Media Strategist Exam

Candidate Handbook

2013 Edition



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1 Introduction

1.1

Overview

Certification programs are intended to ensure the competence of practitioners within a particular field or vocation. Certification exams go beyond training by providing a tangible measurement of an operator's knowledge of specific duties, functions or products. Certification programs establish standards for education and play an important role in developing a qualified workforce. Employers, practitioners and consumers of services all benefit from certification standards.

Social Media has changed the way we interact in our world. Crossing geographies, industries and cultures, the capacity for its use is ever-expanding. However, there are core principles, skills and methodologies in the application of social media across industries that are essential for success. The National Institute for Social Media (*NISM*) is the first organization to dedicate itself to social media education and certification. We use the knowledge and experience of subject matter experts to develop our certification exams. These certification exams are used by educators, organizations and consumers to validate the core skills essential for success in the various vocations of social media.

1.2

Purpose

The purpose of the NISM Social Media Strategist (SMS) certification exam is to validate the foundational skills required of general operators serving in vocations requiring the use of social media. The exam score will be used to determine whether an examinee has reached a minimum level of comprehension of the essential duties required for success, so that he or she can apply this information on the job with a marginal level of supervision.

The SMS exam will assess candidates' knowledge in the six content domains of general practitioners of the various vocations of social media. These content domains defined by the current NISM Industry Advisory Committee (*IAC*) Professional Job Study. These domains are:

- *Strategic Planning*
- *Compliance and Governance*
- *Project Management*
- *Social Media Marketing*
- *Community Management*
- *Research & Analysis*

Questions for this exam are written, validated and reviewed by a panel of content experts in coordination with independent psychometric firm, Assessment Systems Corporation. Reference books and other study materials for the examination are available at www.nisonline.org.

2 Advisory Committee

2.1

Committee Overview

The NISM Industry Advisory Committee (*IAC*) serves as subject matter experts to develop, and oversee the standards, requirements and prerequisites for the NISM Social Media Strategist (*SMS*) certification exam, along with the recertification, and continuing education activities that are required in order to maintain certified status.

2.2

IAC Mission

The mission of the NISM Industry Advisory Committee is to utilize the collective insights & expertise of all committee officers to develop and maintain a system for competency verification that adheres to accreditation standards and standard psychometric principles, and awards credentials to qualified social media practitioners that demonstrate competence through a system of certification and continuing education.

This Committee is provided with full autonomy from all internal or external organizations in the management and administration of certification in an effort to protect the certification program(s) from undue influence. Autonomy is required in order to serve stakeholder interests, primarily those of consumers of professional services.

2.3

Academic Integrity

To avoid conflicts of interest, and preserve academic integrity between certification and education functions, those serving on the NISM Industry Advisory Committee are not responsible for the accreditation or administration of educational or training programs or courses of study which lead to the certification.

3

Exam Content

3.1

SMS Role Description

Social Media Strategists work in a variety of industries and facilities administering adapted social media programs to individuals or organizations. NISM-certified Social Media Strategists will be competent to assess social media organizational readiness effectively; design effective social media programs utilizing goal-setting, understand professional social media methodologies and guidelines; implement social media program(s); modify the program(s) as necessary to achieve reasonable goals; and adhere to all codes, laws, and applicable policies and procedures.

This certification is appropriate for individuals working with clients one-on-one, with small groups, or as part of an organization who utilizes social media, etc. The certification will be valid for a two-year period, at which time it may be renewed. Requirements for renewal will be obtaining a predetermined number of continuing education credits (*CEUs*) and paying applicable fees.

3.2

Task Delineation

Delineating the essential tasks required for competent practice is a rigorous process. The NISM Industry Advisory Committee is composed of professionals who have been selected to be representative of experienced practitioners, and subject matter experts to facilitate and guide the development of this

social media certification credential. This Committee was responsible for delineating the essential duties, and KSAs of general social media practitioners.

Throughout the delineation of responsibilities and tasks, the Advisory Committee members were asked to adhere to the principle that each task must be: 1) Objective and observable, i.e., it must be possible to delegate the task to a colleague. 2) Officers were asked to focus on the tasks that are foundational for all practitioners. 3) Refrain from citing tasks or skills that are important in many fields, such as arriving to work on time, or communicating clearly with co-workers.

3.3

Exam Content Outline

The National Institute for Social Media (*NISM*) in partnership with psychometric firm Assessment Systems Corporation (*ASC*) conducted a national job study to identify the primary tasks performed by general social media practitioners. The fundamental purpose of this study was to establish and validate appropriate content areas for the NISM Social Media Strategist (*SMS*) certification examination. The result of this process includes this exam content outline, which sets forth the tasks and skills necessary for social media practitioners to perform job responsibilities at a minimal professional level. It is the position of NISM that the content areas outlined here are not exhaustive to the qualifications of all social media vocations, but represent a general level of proficiency and theoretical knowledge.

The *Exam Content Outline* provides candidates with a blueprint for the SMS exam. The questions that candidates will be

examined are based on the content domains described in this outline. Candidates must not only understand the tasks themselves but the underlying knowledge and skills required to perform them effectively.

Content Domain I

Strategic Planning

[9%]

Understanding broad strategies and visions for the organization, and then drilling down to specific tactics and tools. Strategic planning is where the foundation is set for social media.

Candidates will be measured on their understanding of essential tasks within this competency domain. The *Strategic planning* domain consists of determining how social media can best be leveraged to advance the greater goals of the organization, and aligning a social media strategic plan with overall organizational goals.

The practices used in determining key performance indicators (*KPIs*) for activities, evaluating social media tools for effectiveness, and selecting tools based upon the goals of the organization and/or campaign are also examined.

Furthermore, candidates are tested on their understanding of integrating social media into cross-functional areas, developing creative brief(s), and performing segment, target, and position (*STP*) analysis.

Content Domain II

Compliance and Governance

[7%]

Before executing a project and incurring further costs, developing policies and determining legal limitations is critical. Growth can quickly be stifled by legal obstacles, particularly when businesses use external social platforms.

Candidates will be measured on their understanding of essential tasks within this competency domain. The *Compliance and governance* domain consists of creating social media policies to govern activities, along with defining when and when not to participate in a conversation.

The procedures for monitoring an organization's 'Terms of service' in order to protect an organization's intellectual property interests are also assessed.

Moreover, candidates will be tested on the process of creating a procedure explaining how to participate and converse in a variety of situations, how to ensure compliance with organization policies regarding social media use, and working with key stakeholders so that their efforts are fully supported.

Content Domain III

Project Management

[17%]

The coordination of many different people, the completion of many tasks in a precise sequence, and acquiring or outsourcing to

key talents to implement the vision, plan or campaign are all core to the skills in social media project management.

Candidates will be measured on their understanding of essential tasks within this competency domain. The *project management* domain consists of designating who will be participating in an organization's social media interactions, and delegating activities to partners, or other team members with skill-sets that are applicable to the task at hand.

Methods for developing a daily action plan to ensure a disciplined approach to social media activities, and ensuring team collaboration and consistency when working in the social space are also examined.

In addition, candidates will be tested on the principles used in determining what platform(s) interactions will take place, maintaining social media platforms as updates or other changes occur, managing multiple projects simultaneously, and adjusting activities in response to competition.

Content Domain IV

Marketing & Communications

[28%]

Priming the marketplace, gauging audience interest, sharing stories and preparing for campaigns and/or sharing your campaign announcements via internet-driven technology such as blogs, RSS, web video productions, podcasts and social networking platforms are essential to the content of social media marketing.

Candidates will be measured on their understanding of essential tasks within this competency domain. The *marketing and communication* domain consists of identifying who is in your core audience, segmenting your core audience, identifying what social media content your audience perceives as valuable, and determining the methods that your core audience prefers to interact with the organization.

The process of putting organizational culture into words that can be used as a guide for social media activities, creating branding consistency across all social media platforms, and using traditional media in conjunction with social media are also assessed.

Candidates will also be tested on the practices of offering social media content that customers perceive as valuable as opposed to selling, providing content that informs, entertains, and helps, and publishing content to the organization's blog(s), microblog(s) and social networking platforms.

Furthermore, candidates are examined on the methods of ensuring all written and video social media content is brief, concise and accurate, taking out advertisements on social media platforms, and reporting campaign status updates on a regular basis to management and key stakeholders.

Content Domain V

Community Management

[19%]

Built around a foundation of quality content, *community management* is the process of ensuring that the two-way online communication between the organization and its customers / stakeholders always flows smoothly. The manager serves as a professional representative for the organization's products or services, while simultaneously gathering feedback for further development of products or services for evaluation.

Candidates will be measured on their understanding of essential tasks within this competency domain. The *community management* domain consists of frequently reaching out and engaging with your audience, fostering a sense of excitement about the organization within the social space, and reacting quickly and appropriately to unexpected situations.

Methods for making connections between members of a community, reading, commenting and responding to the content, comments, or questions of community members, and recognizing the accomplishments of those in an organization's network are also assessed.

Moreover, candidates are tested on their capacity to interpret why a customer or client is upset and find a solution, while also showing understanding of internal networking techniques - knowing who to talk to when a customer has a question or need.

Content Domain VI

Research & Analysis

[19%]

Research and analysis should take place within each of the previous domains. However, the greatest value can be found when real-time feedback and monitoring solutions have been implemented, making trends and behaviors more concrete.

Candidates will be measured on their understanding of essential tasks within this competency domain. The *research and analysis* domain consists of identifying who or what influences (*or potentially influences*) customer buying behavior, performing keyword analysis, and finding core audience in social media channels using keyword research.

Practices for monitoring appropriate analytics, quantifying online traffic/impressions for content, and adjusting/optimizing key performance indicators (*KPIs*) in response to analytics data, are also examined.

In addition, candidates will be tested on the practice of monitoring social media of competition, researching trending industry topics, posts, blogs, and other content, identifying potentially useful social media tools, and summarizing social media work in regular reports.

3.4

Studying for the Exam

Candidates should prepare thoroughly prior to taking the SMS examination. To help prepare for the examination, candidates should review the content outline in its entirety. Familiarity with the material contained in the NISM recommended reference and study materials may also be helpful. These materials can be found at the NISM Online Bookstore at our website www.nisonline.org.

NISM recommends, but does not require any review course, manuals, or books for the SMS examination. To familiarize candidates with SMS examination test question formats and provide an indication of readiness for the examination, NISM partners with educational institutions across the country, along with other customized training services, to provide educational resources for those who are interested in enhancing their understanding of the examination content areas.

4

Exam Eligibility

4.1

Exam Eligibility Requirements

The minimum examination eligibility requirements are the prerequisites that candidates must substantiate before being allowed to sit for the SMS certification examination. Candidates must show that they met at least one of the following two requirements:

- *Minimum of 64 academic credits.* Candidates who have studied in areas such as Marketing & Communications, Business or Computer Science are ideal candidates. However, candidates from all areas of study who have 64 credits or more will be eligible to sit for the SMS exam.

OR

- *Minimum of 2 years of business experience related to social media.* Candidates with experience in community management, social media management or other related vocations are ideal candidates for the SMS. However, all applicants who have at least 2 full years of business experience related to social media in their application will be allowed to sit for the SMS exam.

4.2

Application Points

To demonstrate that each applicant has reached these minimum eligibility requirements a points system has been implemented during the application process to ensure that candidates have a clear understanding of whether they have achieved minimum eligibility.

This points system is described within the online application form on the nisonline.org. If you have any questions regarding the number of points that you are assigned during the application process please feel free contact us by phone or by e-mail at support@nisonline.org

5

Applying for the Exam

5.1

Code of Ethics

The *Code of Ethics* is intended to reflect the standards and behavior that National Institute for Social Media (“NISM”) certified practitioners and program applicants expect of each other as they perform their duties and that reaffirm the value of holding a NISM credential.

The purpose of the *Code of Ethics* is to ensure public confidence in the integrity and service of NISM-certified professionals while performing their duties. The Code of Ethics identifies the types of circumstances that may compromise the reliability of NISM’s ability to establish, or certify, a certificate holder’s or program applicant’s ability to perform the essential tasks of the vocation with at least minimal competency.

For purposes of this Code of Ethics, “essential tasks” are defined as the general vocational duties that are expected to be performed by NISM-certified professionals. “Minimal competency” is defined as the ability to perform the essential tasks effectively, with minimal supervision.

NISM does not monitor on-the-job behavior or actions. Adherence to these ethical standards is expected from all certificate holders and applicants. Any found or reported action of a certificate holder or applicant that compromises the reliability of the certification process, is in violation of the Code of Ethics, or that shows gross incompetence, negligence, dishonesty or

fraudulence while performing the essential tasks of their NISM-certified vocation may be subject to removal of his or her certified status.

All NISM certificate holders and applicants are expected to adhere to the following standards of professional conduct and ethics:

1. We represent ourselves truthfully, honestly, and to the best of our abilities throughout the entire certification process, and in performance of the essential tasks described in section 3 of this handbook.
2. We adhere to all exam site rules, making no attempt to complete an exam dishonestly or to assist any other person in doing so.
3. We protect proprietary or confidential information that has been entrusted to us as if it were our own.
4. We state only what we know to be true, and are clear about opinions & assumptions vs. facts.
5. We are transparent about who we are, and whom or what we represent online.
6. We take ownership of our online activities, the content we have created, and any missteps we have made along the way.
7. We uphold the policies, rules, regulations and laws that govern our activities.
8. We report unethical or illegal conduct to appropriate authorities,

and if necessary, to those affected by the conduct.

5.2

Online Application

The SMS exam applications are accepted continuously on a year-round basis. Candidates will be required to test at a proctored testing site that is selected during the application process.

Candidates must apply online at www.nisonline.org. Applications require payment by credit card. Once a candidate has submitted an application, and it has approved, the candidate will receive an *Exam Voucher*, along with instructions on how to schedule an examination appointment and other pertinent information about the examination.

5.3

Submitting an Application

Submitting an application attests that you have read the NISM Candidate Handbook and its content outline thoroughly. Also by submitting candidates agree to be bound by the *Code of Ethics* outlined in section 5.1. NISM will review eligibility upon receipt of candidate application.

If eligibility requirements are not met, candidates will be refunded for their purchase, but will be charged a \$25 processing fee.

Candidates who are approved will have a window of 30 days to schedule and take their examination. After 30 days *Exam Vouchers* will expire, refunds will not be issued for expired exam vouchers and candidates will be required to reapply and pay all exam fees.

5.4

Non-Discrimination Policy

NISM does not discriminate against any individual because of race, gender, age, religion, disability, veteran status, or national origin. NISM and its testing partners endorse the principles of equal opportunity.

Eligibility criteria for examination and certification under NISM certification programs are applied equally to all applicants regardless of race, religion, sex, national origin, veteran status, age, or disability.

5.5

Candidates with Special Circumstances

NISM acknowledges and complies with the provisions of the Americans with Disabilities Act (ADA) and will offer the examination in a center and manner that is accessible to persons with disabilities or offer alternative arrangements for candidates with disabilities.

If you have a documented disability (including a visual, orthopedic, or hearing impairment; health impairment; learning disability; emotional disability; or multiple disabilities) and need modification to the usual testing conditions, you may request special testing accommodations (e. g., magnifying lens, etc.) to take the NISM Social Media Strategist (SMS) certification exam.

Appropriate documentation must be sent that sufficiently explains your disability and all requested accommodation(s). You must include either a letter from an appropriate professional (e. g., physician, psychologist, occupational therapist, educational specialist) or evidence of prior diagnosis or

accommodation (e. g., special education services).

Any professional providing documentation should know of your disability, have diagnosed and/ or evaluated you, or have provided the accommodation for you. The documentation letter you obtain from that professional should include the following information:

- a) *Identification of the specific disability/ diagnosis;*
- b) *A brief description of the disability;*
- c) *A description of past accommodations made for the disability;*
- d) *An description of and explanation for requested testing accommodation(s);*
- e) *Signature and title of the professional.*

*If you have been diagnosed as having an emotional disability, your letter from the appropriate professional should include identification of the DSM-IV classification of the diagnosis.

Your request for special accommodations must be received at least five weeks before the examination date. If you do not notify NISM of needed accommodations at the time of application, the accommodations will not be available at the time of the examination.

If you have specific questions regarding the provisions of a testing accommodation, please contact support@nisonline.org.

6

Scheduling an Exam

6.1

Proctored Testing Sites

Candidates must take the SMS exam at a proctored testing site. NISM currently offers nearly 250 convenient locations for testing across the United States and Canada for you to choose from. We ask our candidates to select their preferred and second-choice location so that we can provide candidates with a testing option that works best for their schedule.

6.2

Selecting an Appointment Time

Candidates must select a preferred date and time for their examination during the application process. We will make every effort to confirm all requested exam times with our testing sites. However, due to the varying schedules of the examination sites, confirmed times may not match requested times in all cases. This confirmation process will take place via e-mail once an application is approved.

6.3

Changing an Exam Appointment

Candidates can reschedule examination appointments. There is no charge for rescheduling examination appointments but appointments must be rescheduled at least two (2) business days before the scheduled test date. For example, if your appointment is at 11:00 a.m. on Monday, you must cancel by 11:00 a.m. the previous Thursday.

Candidates who do not reschedule their examination appointment within that time frame and who do not appear to take the

examination will be considered no-show candidates and will forfeit all fees.

6.4

Withdrawing from the Exam

Candidates who cannot reschedule their examination appointment or are unable to test for any unforeseen reason, may withdraw from the examination as long as that withdrawal is made at least two (2) business days before the scheduled test date. Candidates who do not reschedule their examination appointment within that time frame and who do not appear to take the examination will be considered no-show candidates and will forfeit all fees.

A processing fee of \$25 will be deducted from the refund amount for every withdrawn application. There are no exceptions. Both scheduled and unscheduled candidates may withdraw from the SMS examination and obtain a partial refund.

6.5

Missing an Exam Appointment

Candidates who do not appear for their examination appointment, are more than thirty (30) minutes late for their appointment, do not have their ID or cannot present valid ID will not be allowed to test and will forfeit all fees. If this occurs, candidates are eligible to reapply, but must pay all required examination fees. Unlike failing candidates, candidates who miss their original examination appointment are not required to wait 90 days before they can retest. As soon as they receive their *Exam Voucher*, they can schedule another appointment to test.

7

Examination Day

7.1

Identification Requirements

Upon arrival to the proctored exam site, a candidate must present their government-issued photo ID and the Exam Confirmation e-mail. If either of these documents are not present at the time of registration the candidate will not be allowed to take the exam.

7.2

Testing Site Requirements

Candidates must leave their belongings (including cell phone) at the check-in location, but all candidates will be provided with a pencil and one sheet of blank paper for each exam they are taking. **No rest room breaks are permitted during exam.**

The exam is computer-based, and candidates will receive login instructions from the proctor. Throughout the exam the proctor will monitor the examinee. When a candidate has completed their exam, the scratch paper will be collected and the examinee may leave the room quietly and will not be allowed back into the room.

7.3

Examination Logistics

The total testing time for the SMS examination is 3 hours. Two hours and 50 minutes are allotted for answering the test questions and 10 minutes are allotted for login, tutorials, and survey questions. The NISM examination contains a total of 165 questions: 150 questions are scored and 15 questions are unscored pretest. These are

not identified and are randomly distributed throughout the examination. Each question lists four possible answers, only one of which is the correct or best answer. The candidate's examination score is based on the responses to the 150 scored questions.

7.4

Inclement Weather or Emergencies

If there is inclement weather, or weather emergencies on the day of the exam that prevent a candidate from arriving within their scheduled time, candidates must contact support@nisonline.org. Candidates will be allowed to reschedule examination appointment with no rescheduling charge due to inclement weather or weather emergencies.

7.5

Emergencies

An emergency is an unplanned medical event that arises less than 24 hours before the candidate's scheduled examination appointment. Examples of what NISM considers to be an emergency include a serious illness, injury or unexpected hospitalization, a death in the immediate family, a serious accident, or a court appearance.

Candidates with medical or personal emergencies can submit a written emergency withdrawal request to NISM, along with any pertinent medical documentation. If approved, a full refund will be issued in the same manner in which the original payment was made.

8 Exam Scoring

8.1

Exam Scoring Method

Candidates are scored only on those items that have been aligned to the exam specifications of the current NISM Job Study and validated for scoring. Items have been reviewed and pretested to ensure quality. Your total score on the exam will be the number of items answered correctly from the 150 scored items. The cutscore for the exam might differ between forms of the exam (*to adjust for differences in difficulty*) but is established according to accreditation standards using the modified-Angoff procedure.

8.2

Pass/Fail Results

A candidate's pass/fail results are not provided to the examinee immediately upon completion of the examination. Score reports and certificates for those who pass, are mailed to candidates via USPS mail within 2-4 weeks from the day of the examination. Standard score reports are provided to all candidates and provide general informative feedback about exam results such as actual score obtained by the candidate. Candidates may use their unique student identification number to contact NISM and verify their Pass/Fail status. Exam scores are not posted on the NISM website.

8.3

Confidentiality of Examination Scores

The exam score is confidential and will not be disclosed unless the IAC receives a written request to do so from a candidate or

is directed to do so by subpoena or court order. A candidate wanting scores released to another entity must indicate in writing which particular scores may be disclosed and identify specifically the person or organization to which the scores should be revealed. No candidate scores will be given by telephone, fax or electronic means for any reason.

8.4

Retake Policy

No refunds are provided for those who fail the SMS examination. Candidates who fail the SMS examination can retake the examination one time. The fee for the retake is \$195 (plus proctor fees). After one retake failures, candidates interested in taking additional retakes will be required to appeal to NISM Industry Advisory Committee. Appeals will be reviewed and approved on a case-by-case basis.

For the first retake, candidates may immediately retake the examination again.

For example, if a candidate fails the examination for the first time on January 1st that candidate may apply immediately to retake the examination, but if he or she fails a second time that person will need to appeal to the NISM Industry Advisory Committee, and pay all exam fees to be eligible to take the exam again.

Candidates who pass the SMS examination are not eligible to retake the examination, unless special circumstances permit. Passing candidates who wish to retake the examination must appeal to NISM Industry Advisory Board, and requests will be reviewed and approved on a case-by-case basis. Circumstances such as renewal failure may be considered appropriate reasons for

approval to retake the examination. If the approval is granted, candidates will be required to pay all listed examination fees.

Note: If a candidate who passed the SMS examination is approved and retakes the examination, the most recent examination result applies. For example, if a candidate who passed the SMS exam retakes the examination and fails, the failing result applies and the candidate is no longer a NISM-certified Social Media Strategist.

8.5

Request for Review of Examination Score

Standard score reports are provided to all candidates and provide general informative feedback about exam results. A diagnostic report is a detailed performance report for the certification examination. The report breaks down the individual's total score into the content areas tested to describe areas of strengths and weakness as they relate to the current Industry Advisory Committee.

Diagnostic reports are available for a fee, up to 1 year from the exam date. Please submit diagnostic report requests to support@nismonline.org.

9 Continuing Education & Recertification

9.1

Continuing Education Requirements

Twenty (20) hours of continuing education, or 2.0 units (*CEUs*) are required for recertification; 1 hour = .1 *CEUs*. *CEUs* may be earned by completing NISM-approved *CEU* programs or by maintaining records of total *CEUs* by completing NISM *CEU* Petition Forms. All *CEUs* must be earned within the two-year certification period, and a percentage of applicants will be audited upon applying for recertification.

9.2

Steps to Recertification

The SMS certification must be renewed every 2 years. A recertification reminder will be sent to you approximately 90 days before your certification expiration date. Be sure to keep your home address and email information current with NISM. The following steps must be taken to maintain certification:

- 1) Complete 20 hours of continuing education during your two-year certification period; maintain your own records of continuing education units during your two-year certification period using separate *CEU* Petition Forms for each program. Do not send Petition Form to NISM unless requested.
- 2) Complete the recertification application
- 3) Mail the recertification application and fee to NISM prior to certification expiration
- 4) After processing, you will receive a new SMS certificate in approximately 2 to 4 weeks. If your application is returned for corrections, this will delay the recertification process.
- 5) A certain number of SMS' are randomly chosen for an audit of continuing education. If you are audited, you will receive notification by mail indicating that you will need to submit copies of all of your continuing education units (*CEUs*).
- 6) Pay the \$135.00 recertification fee.
- 7) Your signature is required or your application will be returned.
- 8) Keep copies of your *CEU* Petition Forms and materials for at least one year after your recertification expiration date.

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