

Management and Strategy Institute, LLC.

Certified Social Media Manager (CSMM)

Course of Study

Introduction

The Social Media Manager certification developed exclusively for the Management and Strategy Institute is designed to give the student a solid understanding of how to manage the social media accounts of large companies.

In this training, we explore how and when to use social media to supplement a broader marketing strategy. We'll cover each of the major social media channels and how they work together. We'll also review how to create a social media strategy, establish usage guidelines, respond when a mistake is made, determine what content is appropriate and optimize each channel.

The goal of the Management and Strategy Institute is to teach you the key competencies required to function in the role of a Social Media Manager. As you go through the training material you will learn the competencies listed below.

The CSMM exam is a timed, online exam. It consists of approximately 50 questions and has a required passing score of 65%.

Competencies

This course of study covers the following competencies:

1) Welcome

- a) **Course** – Title and information
- b) **Overview of Course** – What will be covered
- c) **Purpose of Course** – What you will be able to do when the course is completed
- d) **Lingo** – Commonly use words and their definitions

2) What is the Purpose of Social Media?

- a) Why are companies so eager to use social media?
- b) What do they hope to gain? What are some success stories?
- c) What can go wrong? What are some failure stories?

3) Description of the Major Social Media Channels

- a) **Facebook** – What it is, who it appeals to, how it's used, history, icon, fun fact
- b) **Google+** – What it is, who it appeals to, how it's used, history, icon, fun fact
- c) **Twitter** – What it is, who it appeals to, how it's used, history, icon, fun fact
- d) **YouTube** – What it is, who it appeals to, how it's used, history, icon, fun fact
- e) **LinkedIn** – What it is, who it appeals to, how it's used, history, icon, fun fact
- f) **Pinterest** – What it is, who it appeals to, how it's used, history, icon, fun fact
- g) **Instagram** – What it is, who it appeals to, how it's used, history, icon, fun fact
- h) **MySpace** – What it is, who it appeals to, how it's used, history, icon, fun fact

4) Relating the Channels

- a) How do the social media channels relate to each other?
- b) What are the differences between the channels? What are they used for?

5) Creating a Social Media Strategy

- a) **Social Media Strategy** – What is a strategy? Why do you need it?
- b) **Company Culture** – What is company culture? What does this mean? How does it affect social media? How do you figure out your company's culture?
- c) **Investment**
 - i) Are the stakeholders invested? There are costs in time, energy and money to execute a successful strategy.
 - ii) What is the danger if a decision-maker is not 100% behind the process? How can you "sell" the need for social media if you need to?
- d) **Outcome**
 - i) What does your company want the result of social media to be? Do you need to manage expectations?
 - ii) What are their goals and objectives? How will social media help you get them there?
 - iii) What is the timeline? Is it realistic?
- e) **Audience**
 - i) How will you attract the audience you want?
 - ii) Why is knowing your audience so important?

f) Demographics

- i) **General Demographics** – age, location, gender, interests
- ii) **Additional Demographics** – Where does your target audience get their information from now? What can you learn from these sites? What social media channels do they use?
- iii) **Content** – How will you find and create useful content for your target audience?

g) Frequency

- i) How often does your company expect posts?
- ii) Does this match what the audience wants?

h) Influencers

- i) Who are the major players (individuals or publications) in your field?
- ii) What type of interaction with them would be the goal?
- i) **Which Channels to Use** – What information should you use to decide which social media channels your company should use?

j) What is State of the Relevant Social Media Landscape?

- i) **Evaluating the Company** – What data should you collect to evaluate the company's social media? How do you interpret those results? How do you present it?
- ii) **Evaluating Competitors** – What do they do well? What do they not do well? Why is it important to know this? What can you learn from looking at competitors?

6) Creating Usage Guidelines

- a) **Social Media Strategy** – What is it? Why is it important? What does it cover?
- b) **Establishing Goals** – What are SMART goals? Why are they important? How do you translate your company's expected results to SMART goals?
- c) **Demographics and current state of social media** – The first section will document the data you gathered: demographics, influencers, competitors, the state of the current social media and what needs to be improved.
- d) **Conclusions drawn from data** – The second section will document your recommendations: what type of content to post, where to post it, how often to post it and what tone should be used.
- e) **Specifics to your company** – What is the chain of command for approval? Who has access to the account and is allowed to post? What type of content is not to be used?

f) **Customer Service** – Who is responsible for responding to customer service questions? Complaints? Compliments? What is the maximum response time?

g) **The “Uh-Oh” Section**

- i) What is the procedure when something goes wrong? What policies and responses can be put in place prior to a negative event? Why is setting this up prior to it happening so important?
- ii) Examples of what can go wrong: Delta, #hasjustinlandedyet, HMV, Amy’s Baking Company, Subway

7) **General Social Media Dos and Don’ts** – Industry best practices that apply to all brands and companies

8) **Specific Channel Advice**

a) **Facebook**

- i) **Profile Optimization** – What should a great profile look like and why!
- ii) **Cover and Profile Photo** – Examples of some great ones and why; What are the image dimensions?
- iii) **Content** – What is the best content to post on Facebook and why? What is the worst content to post on Facebook and why?
- iv) **Winning** – What company is winning Facebook? What company is not?
- v) **Guidelines** – Overview of their rules and image requirements
- vi) **Tips and Tricks** – Why is my page gray? How do I deal with spam? What are the page roles?
- vii) **Advertising** – Should I use Facebook to advertise? Why? How does it work? How do I determine ROI? What are the different types of advertising on Facebook?
- viii) **Ad Samples** – What is a good example? What is a bad example?
- ix) **Like Gates** – What is a like gate? Are they allowed? Why did they go away?
- x) **Contests** – What are contests? Why are they helpful? What are the rules?
- xi) **Monitoring Industry Trends** – References for keeping up to date on changes

b) Google+

- i) **Profile Optimization** – What should a great profile look like and why!
- ii) **Cover and Profile Photo** – Examples of some great ones and why; What are the image dimensions?
- iii) **Content** – What is the best content to post on Google+ and why? What is the worst content to post on Google+ and why?
- iv) **Winning** – What company is winning Google+? What company is not?
- v) **Guidelines** – Overview of their rules and image requirements
- vi) **Tips and Tricks** – How do I separate my accounts? How do I switch between accounts? How can I format posts?
- vii) **Advertising** – Should I use Google+ to advertise? Why? How does it work? How do I determine ROI? What are +Post ads?
- viii) **Ad Samples** – What is a good example? What is a bad example?
- ix) **Analytics** – How do I measure engagement?
- x) **Monitoring Industry Trends** – References for keeping up to date on changes

c) Twitter

- i) **Profile Optimization** – What should a great profile look like and why!
- ii) **Header and Profile Photo** – Examples of some great ones and why; What are the image dimensions?
- iii) **Content** – What is the best content to post on Twitter and why? What is the worst content to post on Twitter and why?
- iv) **Winning** – What company is winning Twitter? What company is not?
- v) **Guidelines** – Overview of Twitter rules
- vi) **Tips and Tricks** – Why are there sometimes periods at the beginning of tweets? What is that blue checkmark on some accounts?
- vii) **Advertising** – Should I use Twitter to advertise? Why? How does it work? How do I determine ROI? What are the different types of advertising on Twitter?
- viii) **Ad Samples** – What is a good example? What is a bad example?
- ix) **Analytics** – How do I measure engagement?
- x) **Monitoring Industry Trends** – References for keeping up to date on changes

d) YouTube Branded Channel

- i) **Profile Optimization** – What should a great profile look like and why!
- ii) **Avatar and Background Photo** – Examples of some great ones and why; What are the image dimensions?
- iii) **Content** – What is the best content to post on YouTube and why? What is the worst content to post on YouTube and why?
- iv) **Winning** – What company is winning YouTube? What company is not?
- v) **Guidelines** – Overview of YouTube rules
- vi) **Tips and Tricks** – Why is my Google+ account connected? How do I customize the channel name? What's a custom thumbnail? What is a "personality," and why do I need one?
- vii) **Advertising** – Should I use YouTube to advertise? Why? How does it work? How do I determine ROI? Why does it connect to Google AdWords? Management and Strategy Institute 5 November 15, 2014
- viii) **Ad Samples** – What is a good example? What is a bad example?
- ix) **Analytics** – How do I measure engagement?
- x) **Monitoring Industry Trends** – References for keeping up to date on changes

e) LinkedIn

- i) **Profile Optimization** – What should a great profile look like and why!
- ii) **Banner and Logo Photo** – Examples of some great ones and why; What are the image dimensions?
- iii) **Content** – What is the best content to post on LinkedIn and why? What is the worst content to post on LinkedIn and why?
- iv) **Winning** – What company is winning LinkedIn? What company is not?
- v) **Guidelines** – Overview of LinkedIn rules
- vi) **Tips and Tricks** – Who should I connect with? What are recommendations? What are free backlinks?
- vii) **Advertising** – Should I use LinkedIn to advertise? Why? How does it work? How do I determine ROI? What is Direct Sponsored Content?
- viii) **Ad Samples** – What is a good example? What is a bad example?
- ix) **Analytics** – How do I measure engagement?
- x) **Monitoring Industry Trends** – References for keeping up to date on changes

f) Pinterest

- i) **Profile Optimization** – What should a great profile page look like and why!
- ii) **Profile Image and Board Cover Photo** – Examples of some great ones and why;
What are the image dimensions?
- iii) **Content** – What is the best content to post on Pinterest and why? What is the worst content to post on Pinterest and why?
- iv) **Winning** – What company is winning Pinterest? What company is not?
- v) **Guidelines** – Overview of Pinterest rules
- vi) **Tips and Tricks** – How should I arrange my boards? How many boards should I have? What should I re-pin?
- vii) **Advertising** – Should I use Pinterest to advertise? Why? How does it work?
How do I determine ROI? What are promoted pins?
- viii) **Ad Samples** – What is a good example? What is a bad example?
- ix) **Analytics** – How do I measure engagement?
- x) **Monitoring Industry Trends** – References for keeping up to date on changes

g) Instagram

- i) **Profile Optimization** – What should a great profile page look like and why!
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- ii) **Profile Picture and Cover Photo** – Examples of some great ones and why;
What are the image dimensions?
- iii) **Content** – What is the best content to post on Instagram and why? What is the worst content to post on Instagram and why?
- iv) **Winning** – What company is winning Instagram? What company is not?
- v) **Guidelines** – Overview of Instagram rules
- vi) **Tips and Tricks** – When should I use filters? Do I always have to have professional photos?
- vii) **Advertising** – Not yet! But coming soon!
- viii) **Analytics** – How do I measure engagement?
- ix) **Where can I stay updated?** – References for keeping up to date on changes

9) Content

- a) **Types of Content** – Famous quote photos, company quotes, tips, article shares, marketing posts, engagement posts, either/or questions, current event posts, success stories, trivia, guest posts, reposts
- b) **How do I find content?** – Methods and tools for curating content
- c) **The #1 Rule is:** “Only use content that is relevant to your audience and fits into your goals!”

10) Mistakes

- a) What are some common social media mistakes companies make?
- b) How can you avoid these?
- c) How can you fix it if you make one or more?

11) Integration

- a) **Current Marketing** – How do you integrate social media with the current company marketing?
- b) **Social Media Channels** – How do you integrate your social media channels with each other? Should you?

12) How Do I Grow an Audience?

- a) **Outreach**
 - i) How to publicize your presence
 - ii) How do you know if you’re growing an audience?
- b) **Engagement** – How do you judge what is “good” engagement?
- c) **Targeting Demographics**
 - i) Does targeting work?
 - ii) Examples of success
- d) **Influencers** – How do you get the attention of Influencers? What do you want from them?
- e) **Landing Pages** – The importance of landing pages
- f) **Icons**
 - i) Using customized icons
 - ii) Examples of great ones

13) Interacting with your Followers

- a) Social media is *not* a one way conversation. You must be prepared to have a dialogue.
- b) You must provide customer service through social media—and users *will* expect it to be immediate.

- i) **Good Case Study** – Whirlpool – Heather Armstrong
- ii) **Bad Case Study** – British Air – Hasan Syed

14) Converting Followers to Customers

- a) How do I convert users without alienating them?
- b) Attract → Convert → Close → Delight

15) Social Listening

- a) What is social listening, and why is it important?
- b) Using the information you gather on social media across internal departments: changing policies, offering new services, sharing customer feedback

16) Benchmarks

- a) **Goals to Benchmarks** – How do you translate the goals in the Social Media Strategy to benchmarks?
- b) **Meeting Goals** – How do you know if you're successfully meeting the goals?
- c) **Reporting** – What should you include?
- d) **Tracking, Analyzing and Optimizing** – What should you track? How do you respond to and use the information you gather?
- e) **Having Patience** – “Test, Measure, Modify and Re-test”

17) Images and Copyright Law

- a) **Legal**
 - i) What are the legal implications for using images in social media?
 - ii) What images are you allowed to use? What images are you not allowed to use?
- b) **Free Images** – What is Creative Commons?
- c) **Image Resources**
 - i) Stock photo sites
 - ii) Excellent websites for finding free images

18) Tracking Trends – Additional resources for keeping up with the latest industry news

19) Social Media Management Tools

- a) **Feedly** – Track potential content
- b) **Bitly** – Shorten url links and track clicks
- c) **Storify** – Create and share tweet stories (for live tweeting)
- d) **Buffer** – Stagger content
- e) **Hootsuite** – Manage, post, monitor and analyze multiple social media accounts
- f) **Sprout Social** – Manage, post, monitor and analyze multiple social media accounts
- g) **HubSpot** – Track analytics
- h) **SocialFlow** – Evaluate timing, audience and relevancy
- i) **LeadPages** – Create landing pages
- j) **ShortStack** – Build and manage campaigns and contests

Learning Resources

Recommended:

Material included with your purchase is required reading.

- Free online training material provided by MSI. The material includes everything you will need to learn to pass the exam. This material is included for free with the purchase of your exam. It is in digital form, and available immediately after payment.

Optional:

This material is not required, however it will assist you in becoming a Certified Social Media Manager.

- Lasse Rouhiainen (Sep 10, 2012), Smart Social Media: Your Guide To Becoming A Highly Paid Social Media Manager (Volume 1), ISBN-13: 978-1478129431
- Pam Didner (Sep 15, 2014), Global Content Marketing: How to Create Great Content, Reach More Customers, and Build a Worldwide Marketing Strategy that Works, ISBN-13: 978-0071840972

Preparing for Success

In order to successfully complete the CSMM exam, you will need to make sure you have the appropriate resources to support your learning.

- A quiet location, free from distraction.
- Internet access.
- Current (newest) version of Internet Explorer, Firefox, or Chrome browser.
- Take study notes while going through the training.
- When you are ready to take the exam, you should allot 2-hours of time.

Frequently Asked Questions

What happens if I fail the exam?

- You are given two additional attempts to pass the exam at no additional cost.