

FINAL/ DUTY ONE: CONDUCTS RESEARCH

Performance Area	Level One Novice	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert
1.1 DETERMINES VALUE OF SOCIAL MEDIA TO ORGANIZATION'S BUSINESS GOALS (Includes Tasks A, B, C, G)	1.1.1.1 Studies marketing analysis surveys.	1.1.1.2 Gathers analytical/ anecdotal/ demographic data.	1.1.1.3 Identifies target market (audience).	1.1.1.4 Identifies new markets by interpreting trends.
	1.1.2.1 Identifies competitors and influencers.	1.1.2.2 Monitors competitors' activities on social networks.	1.1.2.3 Evaluates effectiveness of competitors' use of platforms.	1.1.2.4 Adapts own strategy based on evaluation.
	1.1.3.1 Identifies organization's marketing goals.	1.1.3.2 Researches use of social media platforms by target demographic groups.	1.1.3.3 Defines impact of different social media platforms for specified target market.	1.1.3.4 Prioritizes different types of social media based on organizational needs.
	1.1.4.1 Reviews similar industry case studies/ successes/ failures (e.g. Facebook page reviews).	1.1.4.2 Quantifies benefits of reaching target markets through social media.	1.1.4.3 Communicates value of social media to key stakeholders.	1.1.4.4 Manages expectations of colleagues (e.g. communications and marketing people).

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<p>1.2 EVALUATES SOCIAL PLATFORMS, METHODS, DEVICES AND ANALYTICAL TOOLS.</p> <p>(Includes Tasks D, E)</p>	1.2.1.1 Test drives social network platforms and new devices, applications and tools.	1.2.1.2 Assesses suitability of platforms, methods, devices, vendor relationships and analytical tools to meeting organizational goals and reaching target market.	1.2.1.3 Recommends potential uses of various platforms, methods, devices and analytical tools to reach target markets.	1.2.1.4 Articulates short, medium and long term vision for evolution of social media technologies to address organizational needs.
<p>1.3 ASSESSES THE ORGANIZATION'S CAPACITY TO ENGAGE IN SOCIAL MEDIA ACTIVITIES.</p> <p>(Includes Tasks F,H, I, J)</p>	1.3.1.1 Defines job roles, skills and knowledge required to engage in social media activities.	1.3.1.2 Analyzes current skills and skill gaps in organization	1.3.1.3 Determines if the organization's staff has the skills required to engage in social media activities.	1.3.1.4 Proposes how to address gaps (e.g. training programs, outsourcing).
	1.3.2.1 Conducts an inventory of organization's hardware/ software.	1.3.2.2 Analyzes applicability of hardware/ software platform for engaging in social media activities (e.g. corporate firewalls, blocking specific social media platforms).	1.3.2.3 Determines if the organization's hardware and software resources are adequate for engaging in social media activities.	1.3.2.4 Proposes how to address gaps (e.g. purchasing new hardware, engaging vendors, IT staff).
	1.3.3.1 Researches legal and regulatory policies related to communicating through social media.	1.3.3.2 Analyzes gaps and risks associated with organization's current level of compliance with existing legal and regulatory policies (e.g. copyright, fair use) related to social media activities.	1.3.3.3 Determines what actions the organization should take to be in compliance with legal and regulatory policies.	1.3.3.4 Proposes a mechanism for enforcement within the organization.

FINAL/ DUTY TWO: CREATES A SOCIAL NETWORKING STRATEGY

Performance Area	Level One Novice	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert
2.1 DEVELOPS SOCIAL MEDIA STRATEGIES THAT SUPPORT ORGANIZATIONAL GOALS & OBJECTIVES (E.G. BUSINESS PLAN) (Includes Tasks A,B,E)	2.1.1.1 Researches examples of other organizations' social media strategies to identify best practices.	2.1.1.2 Relates industry best practices to organization's goals and objectives.	2.1.1.3 Defines how social media supports relevant organizational goals and objectives.	2.1.1.4 Obtains stakeholder endorsement of the application of social media.
	2.1.2.1 Researches organization's structure and management processes.	2.1.2.2 Identifies challenges that existing organizational processes pose to the integration of social media.	2.1.2.3 Drafts process to manage social media strategy.	2.1.2.4 Works with stakeholders to integrate social media management process (e.g. delivering monthly reports, hosting staff meetings, reviewing goals/progress....)
2.2 DEFINES SUCCESS METRICS ALIGNED TO ORGANIZATIONAL OBJECTIVES (2C) (Includes Task C)	2.2.1.1 Catalogues social media metrics (e.g. impressions, likes, re-tweets, content added, clicks).	2.2.1.2 Assesses relevance of the metrics to the organization's goals.	2.2.1.3 Correlates social media metrics to organizational outcomes.	2.2.1.4 Modifies strategy based on on-going results.
2.3 DETERMINES CONTENT STRATEGIES TO ACHIEVE SOCIAL MEDIA OBJECTIVES (Includes Task D, G)	2.3.1.1 Identifies organization's branding and key messages to target audiences. (2G)	2.3.1.2 Maps brand and key messages to social media content types.	2.3.1.3 Defines branding and messaging guidelines for social media use.	2.3.1.4 Evolves the messaging in collaboration with stakeholders.
	2.3.2.1 Monitors content types (use of video, text....) and frequencies in similar organizations.	2.3.2.2 Evaluates effectiveness of content types and frequencies used by other organizations.	2.3.2.3 Selects content types to achieve organizational social media objectives.	2.3.2.4 Enlists support from stakeholders (leads the leaders) for selected content types.

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2.4 INSTITUTIONALIZES SOCIAL MEDIA POLICY, GUIDELINES AND PROCEDURES (Includes Task F)	2.4.1.1 Researches legal and regulatory requirements and industry best practices for social media guidelines.	2.4.1.2 Gathers requirements from HR, Legal and other stakeholders to ensure that guidelines will address legal/ethical issues and corporate culture.	2.4.1.3 Creates social media policy, guidelines, and procedures.	2.4.1.4 Influences cultural change within the organization (to adopt social media).
2.5 PROPOSES BUDGET TO SUPPORT STRATEGY (Includes Task H)	2.5.1.1 Researches costs for social media budget line items.	2.5.1.2 Justifies budget based on anticipated ROI.	2.5.1.3 Creates preliminary budget.	2.5.1.4 Crafts funding streams from internal (e.g. depts. Marketing budgets..) and external sources (e.g. marketing partners, ...)
2.6 DEFINES RESOURCES TO IMPLEMENT STRATEGY (Includes Task I)	2.6.1.1 Researches industry standard roles and responsibilities (e.g. Job titles, descriptions, salaries, skill levels, etc).	2.6.1.2 Defines job roles, skills, and responsibilities required to implement strategy.	2.6.1.3 Maps existing roles and responsibilities in organization to those needed to implement selected strategy.	2.6.1.4 Assesses gaps in organization skill set to develop remediation plan.

FINAL/ DUTY THREE: ESTABLISHES AN ONLINE PRESENCE

Performance Area	Level One Novice	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert
3.1 ESTABLISHES ONLINE BRAND/VOICE (Integrates Tasks A,C,F,G, H,I)	3.1.1.1 Determines which characteristics of voice (i.e. subject matter expertise, aggregator, formal/ corporate/ casual/ personal) will establish online brand.	3.1.1.2 Posts content that reflects selected voice and addresses target market (e.g. long form, short updates, how to videos, distills, curates, aggregates, case studies, invites community through questions, first person or third person voice).	3.1.1.3 Attains recognition (e.g. by followers, community members, public...) for established voice/style.	3.1.1.4 Assures continuous improvement of content strategy in support of online voice and style.
	3.1.2.1 Adheres to brand, online voice and social media style guide.	3.1.2.2 Maintains consistency of brand across platforms.	3.1.2.3 Ensures online professional persona supports organizational objectives.	3.1.2.4 Trains other contributors that post on behalf of brand.
3.2 ESTABLISHES ONLINE INFRASTRUCTURE (Integrates Tasks B,D,E)	3.2.1.1 Determines types of account on selected platform (e.g. product, service, company celebrity, experts, brand initiatives).	3.2.1.2 Sets up accounts on selected social network platforms.	3.2.1.3 Builds social media profiles mapped to organizational brand.	3.2.1.4 Refines social media profiles to reinforce brand strategy.
	3.2.2.1 Develops inventory of sharable content aligned with marketing strategy.	3.2.2.2 Enables functionality to share content across platforms.	3.2.2.3 Verifies that content will be sharable and visible to users across selected platforms.	3.2.2.4 Innovates solutions to maximize sharability and visibility.
	3.2.3.1 Researches available publishing tools for content distribution (productivity tools such as dashboard tools and content publishing tools).	3.2.3.2 Configures selected publishing tools for content distribution.	3.2.3.3 Develops publishing infrastructure for cross posting (e.g. connecting twitter to Facebook, blog posts and feeds...)	3.2.3.4 Customizes selected infrastructure for content distribution.

FINAL/ DUTY FOUR: CREATES CONTENT TO ENGAGE COMMUNITY

Performance Area	Level One Novice	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert
4.1 CREATES EDITORIAL STRATEGY (Move to Duty 2)	4.1.1.1 Defines overall themes and key messages for audience management.	4.1.1.2 Defines content to engage audience.	4.1.1.3 Aligns messages and content to engage audience.	4.1.1.4 Determines syndication strategy.
4.2 CREATES EDITORIAL CALENDAR (Integrates Tasks A,D,I)	4.2.1.1 Defines content topics and publishing frequency.	4.2.1.2 Assigns content production tasks to contributors/authors.	4.2.1.3 Manages content publishing schedule and process (including topics, timeline, platform, author) to promote brand messages and engage audience.	4.2.1.4 Updates calendar to incorporate planned and unplanned events (e.g. marketing campaigns, announcements, industry developments, news).
	4.2.2.1 Solicits content from internal sources (e.g. marketing department).	4.2.2.2 Requests content contributions from external online community.	4.2.2.3 Develops relationships with industry experts to source content outside the organization (e.g. industry experts with a broad audience, bloggers, writers).	4.2.2.4 Integrates selected content contributions into editorial calendar.
4.3 PUBLISHES CONTENT THAT SUPPORTS ORGANIZATIONAL GOALS/OBJECTIVES AND ENGAGES TARGET AUDIENCES (Integrates Tasks B,C,E,F)	4.3.1.1 Develops content outline/storyboard based on topical research and input from key stakeholders.	4.3.1.2 Creates content elements/ pieces (e.g. quote/ testimonial, video clips from an event, news item, product announcement, case study) to support content outline.	4.3.1.3 Publishes compelling content using relevant media (e.g. text, audio, video) that results in additional audience engagement.	4.3.1.4 Strategizes additional supporting content (orchestrates the next stage of content development).
4.4 OPTIMIZES CONTENT FOR SHARABILITY AND FINDABILITY (Integrates Tasks G,H)	4.4.1.1 Researches metadata and tags to make content sharable for maximum engagement.	4.4.1.2 Determines channels (owned and third party) to syndicate content.	4.4.1.3 Refines content to be shared by assigning tags, metadata and keywords to content to optimize discoverability.	4.4.1.4 Approves requests to syndicate your content to other subject matter experts/ news outlets/ curators/ aggregators.

FINAL/DUTY FIVE: MANAGES ONLINE PRESENCE

Performance Area	Level One Novice	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert
5.1 OPTIMIZES ON LINE PRESENCE THROUGH USE OF SOCIAL ANALYTIC TOOLS (Includes Tasks A,B,)	5.1.1.1 Uses measurement tools/ methods and metrics to monitor social media activity based on selected strategy (e.g. frequency, which data, frequency of data collection, report generation).	5.1.1.2 Ensures tools are tracking data needed to optimize online presence.	5.1.1.3 Refines online presence based on observed analytics (e.g. extracts relative keywords for use in future content).	5.1.1.4 Revises social media strategy based on successful results.
	5.1.2.1 Uses data to determine keywords relevant to your content.	5.1.2.2 Interprets data to determine if it is meaningful toward meeting your goals	5.1.2.3 Produces content based on analytics data (e.g. refined keywords).	5.1.2.4 Reallocates resources based on analytics (e.g. staff, new technology).
5.2 MANAGES ONLINE REPUTATION (Includes Tasks D,E,F, I)	5.2.1.1 Monitors online reputation (e.g. websites, review sites, blogs, social media sites).	5.2.1.2 Recognizes potential impact to online reputation from positive/ negative communications (e.g. comments, reviews, mentions).	5.2.1.3 Responds (to both positive and negative comments) to community in a timely fashion and constructive manner.	5.2.1.4 Creates systems to mitigate negative reactions and encourage positive engagement.
	5.2.2.1 Solicits positive feedback (e.g. testimonials, reviews, references).	5.2.2.2 Reviews online relationship building strategies of competitors.	5.2.2.3 Implements strategies that elicit positive reactions (e.g. establishes customer appreciation program).	5.2.2.4 Inspires others to emulate best practices of reputation management.
5.3 MANAGES ONLINE COMMUNITY (Integrates Tasks G,H,J,K,L)	5.3.1.1 Monitors participation to understand the community dynamic.	5.3.1.2 Moderates size and quality of online community to achieve organizational goals.	5.3.1.3 Drives positive participation/ engagement within the online community (e.g. creates incentives for participation, promotes goodwill, encourages conversation).	5.3.1.4 Creates new communities in response to needs.

FINAL/ DUTY SIX: ENGAGES IN PROFESSIONAL DEVELOPMENT/ ONGOING LEARNING

Performance Area	Level One Novice	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert
6.1 DEVELOPS MENTORING RELATIONSHIPS (Integrates A,C,D,F,G)	6.1.1.1 Seeks out learning opportunities from social media experts.	6.1.1.2 Engages mentor who meets one’s learning goals/ needs.	6.1.1.3 Manages the mentoring relationship by communicating on a regular basis and seeking advice.	6.1.1.4 Shares expertise by mentoring others.
6.2 INFLUENCES OTHERS TO ADOPT SOCIAL MEDIA (Integrates Tasks B, I, J)	6.2.1.1 Articulates value/ changing role of social media in support of organizational goals.	6.2.1.2 Teaches others the value and benefits of using social media to support organizational goals.	6.2.1.3 Inspires others to adopt social media into core business processes.	6.2.1.4 Leads the institutionalization of social media techniques into core business processes.
6.3 KEEPS CURRENT ON SOCIAL MEDIA TRENDS, BEST PRACTICES AND EMERGING TECHNOLOGIES (integrates E,F,H)	<p>6.3.1 This performance area does not warrant a division into levels of mastery. This does not diminish its importance. Below is a sample checklist of performance statements that describe actions social technology enabled professionals can take to apprise themselves of best practices in the field:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Maintains social media resource library and connections through professional organizations. <input type="checkbox"/> Maintains subscriptions (magazines, feeds....). <input type="checkbox"/> Participates in professional organizations. <input type="checkbox"/> Participates in networking events. <input type="checkbox"/> Participates in workshops, courses, relevant conferences and events. <input type="checkbox"/> Engages in self-directed targeted learning activities. <input type="checkbox"/> Shares learning with mentors/ others to further social media impact on organizational goals. <input type="checkbox"/> Follows industry leaders/experts. <input type="checkbox"/> Contacts industry leaders. <input type="checkbox"/> Blogs, posts on regular basis. <input type="checkbox"/> Frequent use of various forms of social media. 			