

A STEP-BY-STEP GUIDE TO A SUCCESSFUL SOCIAL MEDIA PROGRAM

Everything you need to know about establishing your strategy, policy and team.



MARKETING HOW-TO GUIDE

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INTRODUCTION

Companies have caught on to the far-reaching, positive effects of social media on their business. But before jumping into it, you should establish guidelines for who has access and how they are using it.



Social media presents itself as the latest and greatest tool available to marketers and organizations. Why? It offers a revolutionary means for connecting with customers, sales prospects, media, partners, co-workers and recruits; for managing brand reputation and influencing public perceptions; for competing with the “big guns” and establishing thought leadership; for augmenting traditional marketing campaigns; and for search engine optimization.

Organizations should do some planning, however, before integrating social media into their day-to-day routines.

This report will guide you through best practices for garnering buy-in, determining strategy, developing a corporate policy, educating your workforce, monitoring your progress and results, and preparing for bumps along the way.

SECURING INTERNAL BUY-IN

Social media represents both opportunity and risk, with an emphasis on the latter among people who either don't understand it or prefer to hold out until it becomes mainstream. The following steps will assist you in demonstrating to those naysayers that social media is, in fact, already mainstream. Real opportunity exists, and the risks are manageable.



Step 1: Understand What You're Up Against—and State Your Case

Begin by bringing the company stakeholders together to get the conversation started. This meeting should include people from senior management, marketing, public relations, IT, human resources and legal, as well as any social media enthusiasts within the organization. Gather input, and understand the key priorities and concerns of the entire organization.

You can foster approval by addressing concerns with factual evidence and examples of how the company can mitigate risk. Remember to prepare for the initial meeting, so that discernible issues can be addressed on the spot.

Concern #1: Budget Constraints

Especially now that budget cuts are prevalent, you may face glaring concerns regarding spending. Social media itself is cheap—but don't forget the supporting costs involved in launching an effective corporate social media presence and maintaining it. Costs include those:

- Resulting from the dedication of staff time and other company resources to non-core competencies
- Related to initial and ongoing social media education and training
- Involved in promoting your social media presence and generating a following (e.g., ads, contests, “cool” content, etc.)
- From using high levels of bandwidth (especially video).

Response: Social media is a very effective and low-cost vehicle for fulfilling such business objectives as:

- Promoting products and services
- Networking and prospecting for sales leads
- Increasing website traffic
- Boosting natural search engine rankings
- Generating broader brand awareness
- Performing customer and market research
- Monitoring your competition

**“As marketing budgets are being slashed, having a roster of employees who want to go out and communicate with customers directly is really cost-effective.”
—Bryan Rhoads, digital strategist for Intel**

- Optimizing customer service
- Improving public relations and customer relationships
- Establishing the company as a thought leader
- Attracting new talent and performing initial background checks
- Stimulating employee morale.

Research from HubSpot finds that companies that blog welcome an average of 55% more visitors to their sites than companies that don't. And they may generate 97% more external website links and 434% more indexed pages, both of which influence a company's search rank.

Also, a recent global survey by McKinsey of about 1,700 corporate executives finds that 69% of respondents claim measurable advantages from social media, including a lower cost of doing business, better access to knowledge, increased marketing effectiveness, insight for developing more innovative products and services, and higher revenues.

Case in Point: Dell

Dell Outlet's Twitter account has more than 1.3 million followers, but by offering Twitter-exclusive deals, such as coupons and clearance events, the company has earned much more than a huge online audience.

According to a post by staffer Stefanie Nelson on the Direct2Dell blog in June 2009: “Since we started back in 2007, we've earned more than \$2 million in revenue at [@DellOutlet](#), attributed directly to our Twitter activity ... We've surpassed \$2 million in revenue in terms of Dell Outlet sales, but we're also seeing that it's driving interest in new products as well. We're seeing people come from [@DellOutlet](#) on Twitter into the [Dell.com/outlet](#) site, and then ultimately decide to purchase a new system from elsewhere on Dell.com. If we factor those new system purchases that come from [@DellOutlet](#), we've actually eclipsed \$3 million in overall sales.”

Even with an organization-wide block on social media, employees will continue to have access to it outside the office. For this reason, we recommend implementing a company policy (at the very least) to make employees aware of the risks that personal interactions can have on company security.

Concern #2: Security Risks

A whopping 81% of respondents to a survey conducted by Russell Herder and Ethos Business Law in 2009 view social media as a corporate security risk, citing concern about viruses and malware (which can infiltrate the company's IT system), and the potential for confidential company information to be leaked.

Response: Both are valid concerns. You can, however, take steps to help protect your organization.

- Implement firewalls, and update antivirus software.
- Enact a companywide social media policy that explains how the channel can be used. (Learn more in the “Drafting Social Media Policy” section.)
- Educate and train staff about appropriate online activity and how to avoid such conflicts. (Read more in the “Preparing the Organization” chapter.)
- Implement approval processes for employee posts on social media sites.
- Upload software that regulates employee social networking activity.
- Block all social networking site access on corporate servers.

Concern #3: Impact on Employee Productivity

Calculate the estimated amount of time employees will likely spend online with social media multiplied by the average staff salary for an idea of the financial waste that corporate management envisions when it considers permitting employee access to social media.

Response:

This argument centers around the fiscal advantages the company stands to gain by incorporating the use of social media into everyday tasks: a decreased cost per lead, a reduction in marketing spend, and the reduced cost of market research and customer service outreach, for example.

For those managers seeking assurance or more control, offer them a plan for overseeing employee usage.

One solution is to restrict access (completely, or during business hours, when not on break, etc.) for employees whose work does not directly benefit from using social media. Also, businesses can implement Web-filtering to obstruct access to certain sites or during specific time frames.



Employees can still gain access via their mobile phones, however. The true solution again lies in corporate policy. Just as the organization has written codes of conduct and other guidelines to advise on employee behavior, so does a proper social media policy serve to both educate staff on what is appropriate and provide grounds for the company to take corrective action against those who fail to abide.

Concern #4: The Potential for Imperiling the Company's Reputation

Although a recent study by Deloitte reported that 74% of employed Americans understand how easily a brand's reputation can be damaged via social media, it also found that only one-third of those surveyed ever consider their employers, coworkers or clients when posting material online. And that doesn't even begin to account for posts made by the general public who have no allegiance to your brand and are voicing opinions about your product or service, or, in some cases, may even be intent on sully your image. The 340+ million unique monthly visitors to Facebook and 44.5+ million unique monthly visitors to Twitter will continue to share their opinions whether or not you like it, whether or not you ignore it and whether or not you choose to participate in the conversations.

Response:

Just ignoring social media is not the right solution. Our advice is to get involved so that you can directly address any less-than-positive reviews, publicly state your case and continue to fortify the company's reputation. Remember that choosing not to participate in social media puts a company at risk of being perceived as either *not caring* or *behind the curve*.

To support your argument, show your colleagues and decision makers:

What's already being said about the company: Perform a search to find exactly what and how much is being posted about your organization. (See chapters "Developing the Company's Social Media Policy" and "Monitoring Progress and New Developments" of this report for specific tools you can use for your search.) Then explain how the company can best manage and react to those conversations. (Refer to the "Managing Public Relations and Crisis Situations" chapter of this report for insight and tips on responding to user comments.)

How your competitors are using social media: Perform a similar search on your competitors and other companies in your industry to illustrate: a.) To what degree they're involved in social media, b.) What is being said about them and how they are reacting, c.) How they're being perceived by the



public due to this involvement and d.) How their businesses have been impacted by social media, paying special attention to any increased revenues or other business growth.

How the company's involvement in social media can actually improve its reputation: Research performed by Alterian in August 2009 found that 27% of marketing professionals surveyed believe that social media has had the most impact on customer experience during the past year. Plus, 48% of respondents believe it will have the most impact in the coming year. Many companies are recognizing the unique advantages that social media offers for interacting with customers (and the public in general) and boosting their reputations. Benefits include:

- Direct one-on-one interactions, which pave the way for deeper customer relationships
- A quicker, easier way for customers to receive customer service and technical support assistance
- The ability to monitor and respond to negative opinions and crises
- Unfiltered customer opinions in real time and optimized company communications or campaigns in response
- The ability to establish communities of loyalists who may keep you informed (and maybe even rise to your defense) if disparaging remarks are posted against your brand
- The potential to influence positive, viral word-of-mouth spread about your brand, thanks to the peer-sharing attributes of social media.

Case in Point: Ford Motor Corporation

As the U.S. automobile industry struggled to stay running in the troubled economy that first emerged in 2008, Ford took advantage of the media hype and leveraged social media to humanize the company, tell its story and position itself as the American automotive company that will continue to thrive.

“People have always talked about our brands. Now we can capture it; we can respond to it; we can show other people through this word of mouth situation how people are thinking about Ford Motor Company,” said company head of social media Scott Monty in his Blogwell presentation in August 2009.



Case in Point: IBM

In 2008, IBM overtook Microsoft for the No. 2 position in Interbrand's Best Global Brand List, a ranking it continues to hold to this day. Vice president of IBM software channels and social media evangelist Sandy Carter noted that one of the reasons stated for the change in rank was "the number of employees we had online blogging, which put a human face on IBM and elevated us above Microsoft."

When addressing each concern, justify your case by:

- **Stating the facts:** Perform a thorough SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis and highlight the opportunities while explaining the precise steps to manage key concerns. Emphasize the importance of a company social media policy regardless of the intended level of employee interaction with the medium on company time. And be sure to use examples and terms that your audience both understands and can relate to. For example, if your audience is not familiar with social media, such lingo as "tweets" and "wall posts" will only confuse.
- **Drawing on success stories:** Use case studies, particularly from your industry, to demonstrate how others, including the competition, are benefiting through the use of social media. Better yet, test your theory on a small scale to demonstrate the types of results that might be expected from your own company's involvement.
- **Driving home the potential impact to the company's bottom line:** Explain how social media success can be measured. (Find tips for this in the next chapter "Developing the Company's Social Media Strategy.") Outline the potential benefits—new revenues, cost savings, etc.—the company can achieve by embracing these initiatives.

DEVELOPING YOUR COMPANY'S SOCIAL MEDIA STRATEGY

Take time to determine your best foot forward in line with company objectives before jumping in. You will need to do a little bit of research, but the result will be a focused campaign that best uses your resources—and reaps rewards for your business.



Step 2: Research the Marketplace

Begin by figuring out where you should be participating and where the opportunities are by answering the following:

Where do your existing and potential customers play?

“Listening tools” will give you a good idea of what's being said about your company online, where messages are posted and where users spend time.

- **Google Alerts** (<http://www.google.com/alerts>) emails you whenever a chosen keyword (e.g., company or product name, CEO name, campaign tagline, industry term, etc.) is mentioned in any form of online content.
- **Google Blog Search** (<http://blogsearch.google.com/>) scans the blogosphere for any keyword or phrase you input.
- **Twitter Search** (<http://search.twitter.com/>) scans all Twitter posts for your selected keyword or phrase.
- **SiteVolume** (<http://www.sitevolume.com/>) reports how often keywords or phrases appear on Twitter, Digg, MySpace, YouTube and Flickr.
- **SocialMention** (<http://www.socialmention.com/>) enables you to search keywords and phrases by specific channel category (blogs, images, news, video, etc.), or as a whole, and to receive email alerts when a new mention is posted.
- **Socialcast** (<http://www.socialcast.com/>) offers real-time analytics on micro-blogging and other social activities and identifies individual users' level of activity. Unlike most tools, it also aims to quantify the value of “lurkers” who aren't visibly posting comments by how often they frequent a site.

Note what's being said: whether it's positive, negative or neutral; what people are passing along to friends; and if there are any particular needs or customer segments that aren't served.

Search for online conversations about your competition—just as you've done for your own organization.

Where are your competitors participating? How?

Analyze your competitors' social media efforts and how they're being perceived online.

Start by researching where your competitors are participating. This information may be easily attainable just by visiting their company websites, where organizations often promote their social media profiles.

Note the following about each network in which they have a presence:

- **How they present themselves:** What do their profiles look like? What types of company information do they offer? What tone and wording do they use?
- **Who their fans and followers are:** Are these customers, employees, partners or the general public? Are these the same users you are hoping to engage?
- **How they interact with those users:** How often do they post new content and updates? Do they initiate conversations or hold contests to increase user engagement? Do they integrate video or other interactive media to add interest?
- **How their users respond:** How many comments or other interactions have been posted and/or shared by their fans? What are the comments about? To what extent is their fan base growing?

Also search for online conversations taking place about your competition—just as you've done for your own organization. In addition to using the same tools described above, try **Competitious** (<http://www.competitious.com/>), a free beta tool that lets you track and organize news and data about other companies.

Step 3: Decide Where to Concentrate Your Efforts

At first, it may be cumbersome to approach and effectively participate on every social media property. Initially, focus on a select number of sites, and ensure a respectable presence. Then diversify as you are able or recognize the need.

The most frequented social media sites are, in order: Facebook, Twitter, YouTube, LinkedIn, Wikipedia, Flickr and blogs. Facebook leads the way with the most users and the most time spent on the site, according to Nielsen Online.

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But that's not to say that those rankings are reflective of your customers' or potential customers' usage. B2B companies might find more fitting connections on business networking sites, such as LinkedIn. Global organizations will likely find that niche sites take more precedence in certain parts of the world. Use your customer-listening research to determine where to concentrate your efforts.

After you have pinpointed the best networks, spend time developing a working understanding of each (e.g., what it's about, its features and how users interact within the space). Also check out how both social media and industry leaders are interacting and engaging their customers within the space. This will provide ideas and insight into best practices.

Furthermore, be sure to secure your brand's username on each site and check to make sure no one else is illegitimately representing your organization. A simple search on Google or **Namechk** (<http://Namechk.com/>) will tell you if your preferred username is available.

Step 4: Plot Your Objectives and Strategy

Next, determine your goals and planned approach. What are you looking to get out of this investment today and in the future? What steps do you need to take to make it happen? Consider how to:

- **Expand brand or product awareness:** How you will get your brand name out there (advertising, promotion, integration with other media, blogger outreach, and initiation of peer sharing and user-generated content campaigns, etc.).
- **Build community:** How you will attract fans (awareness building, advertising, promoting, appealing to a specific target audience, etc.) and keep them engaged (tailored content plans, tone, frequency and types of interactions, special offers and activities, etc.).
- **Qualify fans and convert them to customers:** How you will solicit information from users (surveys, contests, Facebook applications, conversation starters, measured content views, data mining and analytics, etc.) and use that insight to further the relationship (sales team involvement, product sampling, boosting the one-to-one nature of the conversation, etc.).
- **Improve customer satisfaction:** How you plan to offer exceptional service and support, and how you will go above and beyond their expectations.

Be sure to translate metrics into information about the financial impact on your business. This can take various forms, depending on your specific goals and internal key performance indicators.

Step 5: Decide How To Measure Efforts

Finally, determine what you would consider to be a “win” for each outlined objective—and how each will be quantified and connected to the bottom line. Definitions of a “win” may include:

- Number of fans, followers, readers (or number of high-quality/targeted fans)
- Number of video or other content views
- Volume of user comments posted to your blog, profile or posted content
- Retweet or peer-sharing statistics for related content and posts
- Comment or retweet resonance (number of user comments multiplied by how many followers or friends each user has)
- Engagement (duration of video views, time spent on your blog site, time spent playing your branded game application, etc.)
- Media coverage
- Media impressions (mentions on blogs or other media multiplied by the size of the audience)
- Advertising click-through rates
- Company website traffic statistics
- Quantity of new qualified leads or sales
- Volume of customer service issues handled.

You may need to establish how these “wins” will be tracked, whether through the incorporation of unique URLs and discount codes, or through special tracking programs. For example, **Google Analytics** (<http://www.google.com/analytics/>) tracks referrals from the company’s social media profiles. And **twinfluence** (<http://www.twinfluence.com/>) and **Twitalyzer** (<http://www.twitalyzer.com/twitalyzer/index.asp>) are Twitter-specific tools that measure how influential and far-reaching the company’s Twitter presence is. **Klout** (<http://klout.com/>) tracks the impact of your posted content and links, including which audiences are exposed to the content and how they interact with it.

Be sure to translate metrics into information about the financial impact on your business. This can take various forms, depending on your specific goals and internal key performance indicators:

- Financial return on investment
- Amount of new revenue generated
- Cost per lead
- Amount of money, time or other resources saved

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These measurements will then allow you to compare the company's social media efforts to other media, campaigns and approaches to determine their viability.

Case in Point: IBM Global Business Services

IBM partnered with MIT in an effort to better understand the value of social media relationships by studying the social networking connections of the 20,000 business consultants it acquired from PwC Consulting. Among other findings, they concluded that the company averaged an increase of \$948 in annual revenue for each "address book" contact that a company consultant actively connected with online.

For more insight into how companies are measuring return on social media involvement, check out MarketingProfs' **Social Media ROI Success Stories** (<http://www.marketingprofs.com/store/product/27/social-media-roi-success-stories/?adref=smpgsmroi>).

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Next, you'll want to determine who within the organization will be involved and to what extent. Personality, time limitations and a solid understanding of your organization are key factors in helping you decide on the best person for the job.



Step 6: Dedicate the Appropriate Resources

Social media marketing may be low-cost, but it does require time. Even for a company that does not actively participate, someone has to monitor what is being said about your organization and—assuming you don't want to operate in a bubble—your competition. For businesses wanting to get actively involved, there is, of course, an even greater time commitment.

A company can go about this in different ways, depending on the size of the organization, the extent to which it wants to participate in social media, the resources it can afford and the provisos of stakeholders.

In smaller organizations or those preferring just to monitor, one person can be dedicated to social media either full- or part-time. When there is a concern over how much time is being diverted away from that dedicated person's core responsibilities, some companies choose to divide the responsibility among several staff members.

Larger organizations and those companies preferring to get involved in multiple social media activities often establish a social media department or committee. This is typically made up of people from different disciplines throughout the organization, including marketing, corporate communications, public relations, brand management, IT, regional experts, and so on, to yield a “think tank” environment and ensure accountability for all stakeholder interests.

User activity, however, varies by geography, so global organizations may opt to dedicate resources in each region to assure an appropriate user experience for each location. Be sure then to implement collaboration among the groups to reinforce brand consistency.

The same might also be said for corporations that oversee multiple brands or entities, and that want to create a unique presence for each. For example, each branch of the U.S. Armed Forces has its own social media strategy and presence, however, all activities require approval by a designated government authority.

Establish a succession plan to transfer social media responsibility if someone leaves—especially if you plan only to employ one or two people. Career plans may change, but the need to monitor and participate in social media conversations will not.

Step 7: Decide Who Should Represent the Organization

Who will be the face and voice of your brand? This decision should be influenced by business objectives and can take many forms, such as:

- **The CEO (or other high-level executive):** Users can develop a stronger connection with an organization when they feel they have a personal association with its leader. *The caveat:* Personality is important in social media, as is a more relaxed form of communication (i.e., foregoing the corporate speak). Is the executive comfortable engaging in this way? Also, especially in larger organizations, if you're looking to supply value in the form of product information or user support, the executive may not always be the most expert source. Prepare the appropriate contacts and protocol in advance if this is the case.
- **The marketing department:** They know your brand; they know your customer. The marketing department should, therefore, have a strong sense of what will appeal to your online target market. *The caveat:* Make sure your marketing team's strategy does not strictly revolve around product promotion and the broadcasting of company messaging. Social media participation is about sharing and conversing in a two-way interaction.
- **The company mascot:** A fun personality that encapsulates the company culture can open the door to plenty of creative opportunities. *The caveat:* Novelties can wear off quickly. For the most part, social media users prefer to interact with the real deal—someone they can identify and trust.
- **The intern:** The younger generation is generally more comfortable with social media. Plus, social media takes time, and intern pay is low—so why not marry the two? *The caveat:* Though candor and non-corporate speak do reign within the social media realm, it's important to also consider whether a junior staff member can most effectively uphold and protect the brand's fragile reputation. If you choose to take this route, a pre-posting approval process may be in order. Just make sure that doesn't negatively impact the timeliness of your posts.
- **Separate identities for each distinct customer interest:** If you have multiple brands or diverse customer segments, using separate identities to serve each will likely be more effective and appealing to the target than a single overarching presence. For example, Ford maintains separate Twitter accounts for interacting with Ford Truck fans, Mustang enthusiasts and customers interested in company news or the organization's "green" initia-

Online representation shouldn't just be about maintaining a presence. Many business advantages come through passionate evangelism and the ability to humanize the company. Who can best achieve that for your organization?

tives. *The caveat:* Caring for multiple properties requires more dedicated resources.

- **Multiple individuals:** Some companies prefer to allow all employees to participate in order to expand their visibility and reach. Others choose to divvy up the responsibility among a few people so as to not completely infringe on any one employee's core duties. *The caveat:* Weigh all factors when deciding whether to allow employees as a whole to participate on company time. (We'll cover those factors next.) In general, there is greater potential for message inconsistency and disconnect in tone, duplication of content, and resulting public confusion when multiple representatives and personalities are used. A comprehensive plan, policy and training course can help to overcome those challenges.
- **Your customers:** A number of brands have launched campaigns in which they allow users to sample their products in exchange for sharing their experiences via social media on the company's behalf. Users will have more confidence in the resulting conversations because they come from independent sources. *The caveat:* You must be willing to surrender all control over messaging to achieve authenticity and public acceptance.

Step 8: Weigh Whether to Allow Employee Participation

The true impact of social media access on employee productivity is still uncertain. A report released by Nucleus Research in July 2009 indicates that productivity decreases an average of 1.5% within companies that allow full access to Facebook on company time. But a study by the University of Melbourne noted a 9% increase in productivity among people who use the Internet for personal purposes at work. That impact likely varies from organization to organization, depending on who is employed, how the channel is being used, and so on.

Still, quite a few companies opt to prohibit social media usage on company time for many or all employees, for reasons of preserving productivity, security and corporate image. A study commissioned by Robert Half Technology found that to be the case among 54% of U.S. companies surveyed. Similarly, 40% of companies surveyed by Russell Herder and Ethos Business Law report blocking employee access to social media for any purpose.

But if you look at many of the most well-respected brands in social media today—including Dell, Intel, IBM, Best Buy and Zappos—you'll discover that they tend to whole-heartedly embrace broad employee participation.

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Advantages they enjoy include:

- A broader visibility and reach
- Faster, cheaper communications with customers, prospects, partners, suppliers and colleagues
- The ability to expand engagement and offer increased user value by enabling multiple voices to share their versions of the company story
- An abundance of freshly posted content
- The capacity to provide customers with quick and easy direct access to subject-matter experts to get needed information
- The ability for each area of the company to gain a stronger understanding about the market segments they target and to grow those relationships
- The capacity to optimize the company's presence on each network site by using the talent within the organization (For example, people who enjoy writing can blog; photography enthusiasts can post images to Flickr, etc.)
- Recruiting opportunities
- Enhanced ability to manage employee participation on social networks
- Broad organizational proficiency in what will likely someday become as much an everyday task as answering the telephone.

Should you choose to permit employee participation, keep in mind your technical infrastructure and bandwidth capabilities. You'll also need to consider how to employ the resources to monitor activity and ensure some level of consistency in brand presentation and user experience.

Step 9: Set Parameters

The decision of whether to allow employee access does not need to be strictly all or nothing. Various limits can be established, either through policy or the assistance of specially designed software. Perhaps you allow access for some employees, to certain social sites, or only during certain hours of the day (break times, etc.).

In each case, clearly communicate exactly what is allowed, any steps needed to gain access (managerial approval, completion of a training course, signed agreement, etc.), how to monitor activities, and what the repercussions will be for those who fail to abide by the rules.

DRAFTING YOUR SOCIAL MEDIA POLICY

Social media policy should apply to everyone in the organization, even if access is not granted to everyone on company time. Even after hours, when people are identified as employees of your company, they will be perceived as representatives of your organization. So give them a policy to guide their online interactions.



Step 10: Create “Must Have” Company Policy Inclusions

First, your policy should aim to protect the company’s interests and safeguard it from unnecessary lawsuits, slander and security breaches. Just as you gathered together the company stakeholders initially to understand underlying concerns around the company’s social media involvement, so again should you now bring those people together to assure a comprehensive policy.

Guideline Excerpt from IBM

While IBM encourages all of its employees to join a global conversation, it is important for IBMers who choose to do so to understand what is recommended, expected and required when they discuss IBM-related topics, whether at work or on their own time.

As outlined in the Business Conduct Guidelines, IBM fully respects the legal rights of our employees in all countries in which we operate. In general, what you do on your own time is your affair. However, activities in or outside of work that affect your IBM job performance, the performance of others, or IBM’s business interests are a proper focus for company policy.

Protect confidential and proprietary information.

All sites are vulnerable to hackers, so it is crucial to forbid the discussion of confidential or proprietary information, even in private messages hosted by a social networking platform. This includes comments or posts pertaining to:

- Non-public or unreleased financial, operational or business performance data
- Litigation and other legal matters
- Company strategies and forecasts
- Brand and trade secrets
- Proprietary research findings
- Product or campaign benchmarks
- Unreleased advertising
- Internal processes and methodologies
- Colleagues’ and clients’ personal information.



Remind employees to ask permission or to consult a legal representative or manager if there is any question of suitability.

Guideline Excerpt From Gartner

Protect confidential information.

Protect Gartner's and our clients' confidential information. Information that we would not publicly disclose in our research due to confidentiality concerns should not be disclosed or discussed on the Web. Also, because we are a public company, don't disclose or discuss Gartner's revenues, future business plans or share price. If in doubt, gain permission prior to posting on matters that might be private or internal to Gartner. Respect copyright, fair use and financial disclosure laws.

Don't "give away the farm."

Avoid posting the kind of information and advice for which clients pay Gartner. Gartner wants clients to pay us for information, and associates want Gartner to get paid for information. Associates also may want to participate in Web conversations about IT, which means exchanging information and opinion about IT. To ensure you aren't divulging too much information, be thoughtful about what information you post and how you respond to feedback. Ask yourself: "Is this the kind of information that our clients normally pay us for?" If the answer is "Yes" or even "Perhaps," then confer with other Gartner colleagues before posting. Especially with IT subjects, focus on opening a dialog around topics to enhance awareness of the topic, to gain constructive feedback from the broader IT community and to build awareness of Gartner activities and research.

Guideline Excerpt From Sun Microsystems

Other People's Information

It's simple—other people's information belongs to them (be it intellectual property or personal information). It's their choice whether to share their material with the world, not yours. So, before posting someone else's material, check with the owner for permission to do this. If you're unsure, [Sun's copyright experts](#) or [Sun's privacy experts](#) can offer guidance.



Avoid conflicts of interest.

It's a good idea to prohibit employees from identifying, referencing, discussing or citing business partners, clients or vendors—even in a positive light—without those parties' explicit permission, so you don't risk damaging those relationships. This can (and should) be extended to encompass photos featuring clients, partners and vendors, or private casual conversations that take place on a blog or social platform.

Guideline Excerpt From Eastman Kodak

Protect confidential information and relationships. Online postings and conversations are not private. Realize that what you post will be around for a long time, and could be shared by others. Given that,

- *Avoid identifying and discussing others—including customers, suppliers, your friends and co-workers—unless you have their permission*
- *Obtain permission before posting pictures of others, or before posting copyrighted information.*

Guideline Excerpt From IBM

Protect IBM's clients, business partners and suppliers.

Clients, partners or suppliers should not be cited or obviously referenced without their approval. Externally, never identify a client, partner or supplier by name without permission, and never discuss confidential details of a client engagement. Internal social computing platforms permit suppliers and business partners to participate, so be sensitive to who will see your content. If a client hasn't given explicit permission for their name to be used, think carefully about the content you're going to publish on any internal social media and get the appropriate permission where necessary.

It is acceptable to discuss general details about kinds of projects and to use non-identifying pseudonyms for a client (e.g., Client 123) so long as the information provided does not make it easy for someone to identify the client or violate any non-disclosure or intellectual property agreements that may be in place.



Although relationships may not be on the line, comments about competitors should also make the list so you can avoid stirring trouble or being sued for libel.

Guideline Excerpt From Intel

If you want to write about the competition, make sure you know what you are talking about and that you have the appropriate permission.

Eschew copyright and trademark infringement.

Remind employees that copyright and fair use laws must be abided, that proper credit should be given to all rightful owners, and that plagiarism, even as part of a passing comment, is illegal. This should apply not only to copyrighted publications, but also to any logos, photos, videos or audio files shared.

Guideline Excerpt From IBM

Respect copyright and fair use laws.

For IBM's protection and well as your own, it is critical that you show proper respect for the laws governing copyright and fair use of copyrighted material owned by others, including IBM's own copyrights and brands. You should never quote more than short excerpts of someone else's work. And it is good general blogging practice to link to others' work. Keep in mind that laws will be different depending on where you live and work.

Abstain from defamatory speech.

Emphasize “zero tolerance” for any posted interactions that contain obscenities, personal insults, ethnic slurs and other language that might be perceived as inflammatory, discriminatory, objectionable or alienating to any individuals or groups. Similarly, religious and political statements should not be condoned.

Guideline Excerpt From LiveWorld

Be respectful.

We encourage you to express your opinions, but we ask that you don't resort to personal attacks, harassment, cultural insensitivity, or discrimination in the process.



Guideline Excerpt From Plaxo

You may not post any material that is obscene, defamatory, profane, libelous, threatening, harassing, abusive, hateful or embarrassing to any other person or entity. This includes, but is not limited to, comments regarding Plaxo, Plaxo employees, Plaxo's partners and Plaxo's competitors.

Guideline Excerpt From The Washington Post

Post journalists must refrain from writing, tweeting or posting anything—including photographs or video—that could be perceived as reflecting political, racial, sexist, religious or other bias or favoritism that could be used to tarnish our journalistic credibility. This same caution should be used when joining, following or friending any person or organization online.

Explain personal responsibility.

Also ensure that employees clearly understand that they are ultimately responsible for anything and everything they post.

Guideline Excerpt From Intel

Your responsibility.

What you write is ultimately your responsibility. Participation in social computing on behalf of Intel is not a right but an opportunity, so please treat it seriously and with respect. If you want to participate on behalf of Intel, take the Digital IQ training and contact the [Social Media Center of Excellence](#). Please know and follow the [Intel Code of Conduct](#). Failure to abide by these guidelines and the Intel Code of Conduct could put your participation at risk. Contact social.media@intel.com for more information. Please also follow the terms and conditions for any third-party sites.



Guideline Excerpt From IBM

Use your best judgment.

Remember that there are always consequences to what you publish. If you're about to publish something that makes you even the slightest bit uncomfortable, review the suggestions above and think about why that is. If you're still unsure, and it is related to IBM business, feel free to discuss it with your manager. Ultimately, however, you have sole responsibility for what you post to your blog or publish in any form of online social media.

Step 11: Create Add-ins and Supporting Policies

In addition to advising what not to do, many companies also offer guidelines on proper procedure for online representation, content and commenting.

Online Representation

How employees present themselves can be as important as what they say, particularly if they are directly representing the organization. Let employees know whether it is acceptable to maintain one account (or blog, etc.) for both professional and business use, or if separate accounts should be established. For business-related profiles and mixed-use accounts, also establish the following guidelines:

- **Appearances:** For business-only accounts, direct users on how to present themselves as members of the organization—for example, whether and how to state their titles and business contact information. And for mixed-use and personal accounts, let employees know whether it is permissible to disclose such information, including whether they can give out their work email addresses in personal posts.

Also provide guidance on acceptable and unacceptable usernames and avatars (dress code, depictions, etc). Requiring the use of real names, as opposed to nicknames, is fairly common. In the name of consistency, Dell encourages (but doesn't require) that its employees use their first names coupled with "@dell" (e.g., Lionel@dell) as usernames. Other organizations neither recommend nor require a specific format, but do request that lewd or unmannerly monikers and icons not be employed.



Guideline Excerpt From Microsoft

If you plan to tweet about any professional matters (such as about the business of Microsoft or other companies, products or services in the same business space as Microsoft), in addition to referencing your alias@microsoft.com email address, whenever possible use the service's profile or contact information to assert that you are a Microsoft employee and/or affiliated with a specific group/team at Microsoft.

Guideline Excerpt From Sun Microsystems

Whether in the actual or a virtual world, your interactions and discourse should be respectful. For example, when you are in a virtual world as a Sun representative, your avatar should dress and speak professionally. We all appreciate actual respect.

- **Joint participation accounts:** When multiple internal users are contributing to a single account (for example, if your customer service team takes turns answering requests via Twitter, as is the case for Southwest Airlines), it can help curb confusion by letting users know who's currently managing the account or posting which comments. Some companies begin or end each post with the employee's name or initials; others regularly change the profile bio to reflect who's "on duty."
- **Transparency:** Beyond disclosing full name and title, urge users to be clear about their roles and their understanding or involvement in the topic of discussion.



Guideline Excerpt From IBM

Be who you are.

Some bloggers work anonymously, using pseudonyms or false screen names. IBM discourages that in blogs, wikis or other forms of online participation that relate to IBM, our business or issues with which the company is engaged. We believe in transparency and honesty. If you are blogging about your work for IBM, we encourage you to use your real name, be clear who you are, and identify that you work for IBM. Nothing gains you more notice in the online social media environment than honesty—or dishonesty. If you have a vested interest in something you are discussing, be the first to point it out. But also be smart about protecting yourself and your privacy. What you publish will be around for a long time, so consider the content carefully and also be judicious in disclosing personal details.

- **Disclosures:** Insist that employees indicate when they have a vested interest in a subject they are blogging or commenting about, as shown in the IBM example above. Furthermore, offer a common disclosure statement for employees to use whenever they post personal opinions and non-expert advice, as shown in the Kodak example below.

Guideline Excerpt From Eastman Kodak

Even when you are talking as an individual, people may perceive you to be talking on behalf of Kodak. If you blog or discuss photography, printing or other topics related to a Kodak business, be upfront and explain that you work for Kodak; however, if you aren't an official company spokesperson, add a disclaimer to the effect: "The opinions and positions expressed are my own and don't necessarily reflect those of Eastman Kodak Company."

Content Policy

Many organizations also cover what is expected—both by the company and the online community—in terms of effective interaction and engagement. Recommendations should provide guidance around tone and voice, effective engagement methods, content posting frequency and how to handle user comments and mistakes.

DRAFTING YOUR SOCIAL MEDIA POLICY



- **Acceptable content:** Help employees understand what qualifies as appropriate content. For example, are they allowed to offer technical assistance or customer support? Is it acceptable to intermingle business-related posts with personal interactions?
- **Tone and voice:** Social media is a casual interactive medium, so encourage users to write in the first person, speak informally, and showcase their personalities in their posts.

Guideline Excerpt From Intel

Talk to your readers like you would talk to real people in professional situations. In other words, avoid overly pedantic or “composed” language. Don’t be afraid to bring in your own personality, and say what’s on your mind.

Guideline Excerpt From Gartner

Web participation is about enjoying personal interactions, not delivering corporate communications. Always identify yourself. Write in the first person. If your Web participation (e.g., keeping up your blog) feels like work, you’re probably doing too much of it, and it’s likely to interfere with your work at Gartner. A big part of the Web experience is that it is more playful than most other mediums. Your Web participation should reflect this characteristic. The most successful blogs are those with an informal and humorous style. It’s OK—some might say mandatory—to poke fun in Web postings, but keep in mind that such humor should always be appropriate and should stimulate discussion, not stifle it.

- **Engagement strategy:** Coach employees on the types of messaging to use to build their communities and keep visitors engaged. Social media users seek some form of value—whether by improving knowledge, solving problems, provoking thought, supporting the community or entertaining the masses—in exchange for interacting with your brand. Keep in mind that perceived value will vary in different parts of the world, so know your market before you dictate. Brand-related messages should also be interesting or entertaining and balanced with other posts of interest and contributions to the conversations taking place. Further urge users to foster an environment where customers and others are comfortable interacting and sharing their thoughts, requests or grievances.

Though automated messaging programs exist, we advise foregoing those for true human interaction—your fans and followers will be able to tell the difference.

- **Posting frequency:** Outline appropriate activity levels and posting frequency for increasing brand engagement. For example, the British government, advises its civil servants to produce between two and 10 tweets per day, at least 30 minutes apart, in order to provide a continuous stream of content without inundating their followers. Blogs and such sites as Facebook tend to require less frequent postings but still call for several posts weekly.

Guideline Excerpt From Sun Microsystems

Be interesting, but be honest.

Writing is hard work. There's no point doing it if people don't read it. Fortunately, if you're writing about a product that a lot of people are using, or are waiting for, and you know what you're talking about, you're probably going to be interesting. And because of the magic of linking and the Web, if you're interesting, you're going to be popular, at least among the people who understand your specialty. Another way to be interesting is to expose your personality; almost all of the successful online voices write about themselves, about families or movies or books or games; or they post pictures. People like to know what kind of a person is writing what they're reading. Once again, balance is called for; a community site is a public place and you should avoid embarrassing the company and community members. One of Sun's core values is integrity, so review and follow Sun's Standards of Business Conduct in your online community contributions.

Guideline Excerpt From Intel

Consider content that's open-ended and invites response. Encourage comments. You can also broaden the conversation by citing others who are blogging about the same topic and allowing your content to be shared or syndicated.

- **Response to user comments:** The beauty of social media is that the general public can interact with brands and share their opinions under very casual—and public—circumstances. It is best practice to respond to user comments, when appropriate, to let users know they are being heard and to do so in a timely fashion. Counsel users to respond with respect and diplomacy. Because differences of opinion are bound to come up, employees should take the high road and protect the company's reputation by not inflaming the conflict.



Guideline Excerpt From Eastman Kodak

Keep your cool. One of the aims of social media is to create dialogue, and people won't always agree on an issue. When confronted with a difference of opinion, stay cool. Express your points in a clear, logical way. Don't pick fights, and correct mistakes when needed. Sometimes, it's best to ignore a comment and not give it credibility by acknowledging it with a response.

- **How to handle mistakes:** Instruct employees on the actions to take when they make a mistake or post inappropriate material. Directions should include making the correction as soon as possible, being up front with others about the mistake, and never altering a previous post without divulging that the change was made.

Guidelines Excerpt From Intel

Did you screw up?

If you make a mistake, admit it. Be upfront, and be quick with your correction. If you're posting to a blog, you may choose to modify an earlier post—just make it clear that you have done so.

Comments Policy

Many companies also protect themselves from public crudity on their blogs and social networking profiles by posting a comments policy designed for readers (rather than employees) that outlines how they will handle public commentary.

Some companies choose to moderate all comments before they are posted. This can be confusing to users who do not see their comments immediately posted, so it's important to assure as short a delay as possible. Other companies allow comments to immediately show and then moderate them after the fact.

In general, display all posts, good or bad, unless they contain expletives, are offensive to users in any way, or are completely out of context (e.g., messages posted by spammers, and so on).



Example From Intel

Intel strives for a balanced online dialogue. When we do moderate content, we moderate using three guiding principles.

The Good, the Bad, but not the Ugly. If the content is positive or negative and in context to the conversation, then we approve the content, regardless of whether it's favorable or unfavorable to Intel. However if the content is ugly, offensive, denigrating and completely out of context, then we reject the content.

Example From Fairfax County, Virginia (government)

Facebook Comments Policy

We welcome you and your comments to Fairfax County's Facebook Page.

The purpose of this site is to present matters of public interest in Fairfax County, including its many residents, businesses and visitors. We encourage you to submit your questions, comments, and concerns, but please note this is a moderated online discussion site and not a public forum.

Once posted, the County reserves the right to delete submissions that contain vulgar language, personal attacks of any kind, or offensive comments that target or disparage any ethnic, racial, or religious group. Further, the County also reserves the right to delete comments that are: (i) spam or include links to other sites; (ii) clearly off topic; (iii) advocate illegal activity; (iv) promote particular services, products, or political organizations; or (v) infringe on copyrights or trademarks.

Please note that the comments expressed on this site do not reflect the opinions and position of the Fairfax County government or its officers and employees. If you have any questions concerning the operation of this online moderated discussion site, please contact the Office of Public Affairs at publicaffairs@fairfaxcounty.gov.

DRAFTING YOUR SOCIAL MEDIA POLICY

Example From Cisco

Cisco reserves the right to remove any posted comment on Cisco Blog site(s) that is not appropriate for the topic discussed or uses inappropriate language. Cisco also reserves the right to post particular communications on a Cisco Blog.

PREPARING YOUR ORGANIZATION

Even for companies that do take the time to document all the rules, staff education and training is key to a successful social media program. This is especially true in a day and age when time is in short supply and reading every word of a new company policy isn't typically a priority.



For organizations such as Intel, which requires completion of a 30-minute course before employees can actively participate online (others such as Dell use online-based curriculum), training has become a governing mechanism that helps to curb risk and potential problems. It further works to boost employee participation by offering guidance to those who would like to get involved but aren't sure how or where to start.

For example, retailer Zappos keeps it short and to the point: “Be real and use your best judgment”—demonstrating enormous trust in its people. But Zappos can afford to do this because it covers all the “do’s and don’ts” and “things to look out for” in its intensive new employee orientation.

Step 12: Require Initial Training

Training should be mandatory for every employee who wishes to engage in social media, including all levels of management. It should aim to offer both a solid understanding of social media and actionable know-how for appropriately participating. Curriculum should include:

- **A social media primer:**
 - o Introduce the various social media sites and tools, explain their nuances, and clarify their terms of service.
 - o Explain why social media is important and useful for the organization.

- **Company rules and guidelines:**
 - o Cover each stanza of your written policy with an emphasis on what is allowed, and answer any questions.
 - o Address companywide expectations and participation criteria.
 - o Iterate who is authorized to speak on the company's behalf.
 - o Outline responsibilities and ownership rights.
 - o Encourage common sense and good decision-making based on the company's values and code of conduct.
 - o Explain how staff activity will be monitored.
 - o Expound the consequences for violating policy, including the possibility of termination and/or involvement in a civil lawsuit.

PREPARING YOUR ORGANIZATION



- **Legal considerations:**
 - o Explain the risks and ramifications of posting information, recommendations and opinion online.
 - o Identify common topics of concern.
 - o Urge the use of disclaimers—but also explain their limitations in terms of legal protection.
 - o Emphasize the fact that online users include clients, potential customers, competitors, colleagues and past employees.
 - o Confirm who to go to for message approvals or legal assistance.
- **Risk-avoidance techniques:**
 - o Explain the security issues that can arise from online activity.
 - o Spell out how to avoid these issues (guarding personal information, changing account passwords, never clicking on suspicious links, etc.).
 - o Describe the protocol if a problem occurs.



Example from Eastman Kodak

Protecting your, and Kodak's, privacy and resources.

Be careful with personal information. This may seem odd, since many sites are created to help promote sharing of personal information. Still, astute criminals can piece together information you provide on different sites and then use it to impersonate you or someone you know—or even reset your passwords. Similarly, “tweeting” real-time about your travels may confirm you aren’t at home—letting someone target your house. So, be careful when sharing information about yourself or others.

Don’t be fooled. If you do post personal information on a site like Facebook or Twitter, criminals can use it to send you emails that appear to come from a friend or other trusted source—even the site itself. This is called “phishing.” The lesson is: Don’t click links or attachments unless you trust the source. For example, be wary of emails that say there is a problem with your account, then ask you to click on a link and input your username and password. The link may connect to a site that looks exactly like Facebook, Twitter, your bank’s website, but is really a fake site used to get even more personal information. This ploy can also be used to infect your computer with a virus or keystroke logger.

Disable dangerous privileges. If a site allows others to embed code—like HTML postings, links, and file attachments—on your page or account, criminals can use them install malicious software on your computer. If possible, disable the ability of others to post HTML comments on your home page.

Heed security warnings and pop-ups. There’s a reason your security software provides warnings like:

—“A process is attempting to invoke xyz.exe. Do you wish to allow this?”

—“The process ‘EXPLORE.EXE’ is attempting to modify a document ‘X.’

Do you wish to allow this?”

Never allow or say “yes” to such actions, unless you know they are safe.

PREPARING YOUR ORGANIZATION



- **Engagement techniques:**
 - o Explain proper procedure for interaction and community involvement on the various sites.
 - o Clarify what is appropriate representation for the company and which types of commentary are permissible.
 - o Offer tips for increasing engagement with customers and other users.
 - o Explain the importance of balancing personal and professional posts (if personal commentary is permitted).
- **Rundown of resources:**
 - o Acquaint staff on how to access the company policy, as well as any other information and resources available either in-house or online.
 - o Identify the internal experts and explain where to go or who to contact for additional assistance.

After completion of training, have employees sign an agreement or code of conduct that outlines the expectations and provisos to their involvement in social media.

Example From Hill and Knowlton

Collective Conversation Code of Conduct

I will not criticize clients or colleagues.

I will disagree with others' opinions respectfully.

I will not do anything that breaches my terms of employment.

I will acknowledge and correct any mistakes promptly.

I will preserve the original post, using formatting to show updates where appropriate.

I will only delete comments that I deem to be spam, offensive to me or my readers or unrelated to the topic of my post.

I will disclose conflicts of interest where I am able.

I will not knowingly post inaccurate information.

I will link to online references and original source materials directly.



Step 13: Provide Ongoing Guidance and Resources

Implement continuing resources that reinforce the initial training. Keep staff up to date on emerging social media properties, issues and considerations. Help them continue to participate and engage, and provide outlets for questions and concerns. Examples of ongoing guidance and resources include:

- Offering “advanced” education courses and materials
- Identifying who to go to for various questions and concerns
- Establishing an internal community of social media practitioners who can share best practices and learn from each other
- Developing guidebooks that include best practices, research sources, sample posts and acceptable responses to common customer inquiries
- Circulating daily content messages for staff to post
- Including social media updates in internal company communications.

MANAGING YOUR COMPANY'S SOCIAL MEDIA PROGRAM

Once you have your social media program up and running, your organization will still need to stay on top of conversations about your company.



Step 14: Monitor Progress and New Developments

Managing the company program after launch requires daily monitoring to:

- Assure staff compliance with policy and rules
- Ensure consistent brand messaging across all platforms and internal users
- Track what's being said about the brand/company and monitor public perception
- Identify key online influencers
- Pinpoint opportunities and gaps
- Keep tabs on industry and competitor efforts
- Gain insight on best practices and emerging trends
- Identify new and emerging channels.

In addition to those previously described (Google Alerts, Google Blog Search, Twitter Search, SocialMention, Socialcast, Google Analytics, Klout, etc.), consider these helpful tools:

- **BlogPulse** (<http://www.blogpulse.com>)—for automated analysis and reporting on blog activity
- **Technorati** (<http://technorati.com>)—a blog-focused search engine
- **Addict-o-matic** (<http://addictomatic.com>)—customizable keyword tracking interface
- **TwitterFriends** (<http://www.twitter-friends.com>)—for understanding your followship on Twitter
- **Complaints Board** (<http://www.complaintsboard.com>)—directory of user-submitted complaints against brands
- **Collective Intellect** (<http://www.collectiveintellect.com>)—real-time consumer conversation analysis
- **Radian6** (<http://www.radian6.com>)—comprehensive listening, analysis and reporting platform
- Various marketing and news publications.

MANAGING PUBLIC RELATIONS AND CRISIS SITUATIONS

Effectively preserving your brand's online reputation is another continuous undertaking that involves establishing credibility ahead of time, rapidly and diplomatically responding to customer issues and complaints, and paving the way for efficient crisis control.



Step 15: Establish Credibility

How you conduct your business and brand generally will have the greatest impact on credibility and reputation building. However, you can do a few things every day to help influence the spread of public perception online.

- **Inundate the Web with good news.** Aim to put as much positive content out there as possible so that it paints a pretty picture but also works to overpower any negative comments or complaints. Strive to develop content that users will find interesting, useful and worthy of sharing. Also be sure to incorporate share features—such as buttons to automatically post to Twitter, Facebook, Digg or other similar sites—to encourage viral spread.
- **Tap the blogosphere.** Favorable third-party opinions will also help to establish public confidence and generate additional reassuring content to counteract anything negative posted about the brand. Reach out to trusted industry and niche blogs with brand-boosting stories that will benefit their readerships. Or encourage product reviews by offering free trials and samples. Also comment on industry-related posts with responses that demonstrate thought leadership.
- **Leverage fan loyalties.** If you've set the stage properly through successful relationship building (both online and offline), devoted customers and fans will rise to your defense when someone posts something they feel is unfair or uncharacteristic of the brand. But why simply wait for damage control? Channel that allegiance into positive everyday brand promotions—often all you need to do is ask. Ask customers to post product reviews or publicly rate your services: Ask fans to post their favorite brand experiences. And ask visitors to spread the word by sharing their own posted comments and any content that you post and they find valuable.
- **Remaining transparent and honest.** Regrettable actions have a way of publicly coming to light in the social media world, so it's important to foster trust by being upfront about any problems or mistakes. Demonstrate leadership by explaining how the company is both rectifying the issue and ensuring it doesn't happen again.

If the comment is posted to your blog or Facebook wall, do not delete it—unless it contains profanity, slurs or similar elements that disturb readers in general.

Step 16: Respond to Public Comments and Complaints

Social media is transferring control of brand messaging to the people, as users now have a public arena in which to post their opinions, vent their frustrations and share their complaints. Go about it the wrong way, and you'll likely end up like one airline company that now has mass users rallying against it. But handle social media correctly, and you can turn an unfortunate incident into a relationship-building machine.

Here are a few tips on how best to manage the situation:

- Kindly reach out to the user in an effort to acknowledge their pain, gain a better understanding of the situation and effectively quell the issue by offering solutions.
- Avoid inflaming the situation, snapping back with a disparaging remark, or engaging in a battle of opinions.
- If the issue in question is the result of a mistake or oversight on the part of your organization, demonstrate leadership by thanking the user for bringing the matter to your attention and emphasizing the steps you are taking to correct it.
- If the comment is unjustified or inaccurate, politely comment back with the facts of the situation and a virtual “olive branch” for making amends.
- If the comment is completely outlandish and obviously not intended as either constructive feedback or a request for resolution, let it go. Sometimes the best response is no response.

If the comment is posted to your blog or Facebook wall, do not delete it—unless it contains profanity, slurs or similar elements that disturb readers in general. Deleting the comment will be perceived as a “big brother” attempt to control or hide the truth.



Example of an Appropriate Response From Embarq

User post:

“Our phones are down today, thanks to Embarq! I just upgraded my internet connection to 5Mbps (YAHOOO!!!!), But in doing so, Embarq screwed up something and now my phone lines are dead!!! I am STILL HERE!!!! If you try to call the shop and get a disconnected message, Please just PM me and I’ll call you right back. Thank you all for your understanding. It’s going to be a loong friggin day!!!”

Embarq representative response:

*“Hello Mr. Edmonston,
This is a message from Lamont with Embarq Customer Support. I would first like to apologize for the frustration the service issue may have caused you. We see that you have an issue with the Embarq phone service and we are here to help. We would like the opportunity to assist you in resolving this issue you are having. Please let me know if the issue has been resolved or if you need additional assistance. Please provide your phone number in a private message or PM and we will research and resolve your issue. Thank you for giving us the opportunity to help you.”*

Comment from another user:

“Wow Mike you have got some pull!! Post a message on a board and the vendor contacts you....”

User response:

“Wowzers Batman! that’s a first. I do have to say that they were right on top of things and got it resolved within a few hours. Their customer service is almost as good and efficient as mine!”

Embarq representative follow-up:

*“Hello Mr. Edmonston,
I wanted to touch base with you again to make sure everything was working properly with your Embarq service associated with your Technical Scuba Training Ctr. business phone number. We are continually reviewing our services to make improvements. We appreciate you as a valued customer. Please let me know if you have any additional issues.”*



Step 17: Have a Plan for Handling a Crisis Situation

What happens when the problem at hand involves or evolves into more than a posted complaint? While there is no universal protocol for all companies or all crisis situations, you can lay out a plan to navigate through a crisis:

- Designate the point person(s) who will serve as the voice of the organization.
- Empower your people to make timely decisions and act quickly.
- Aim to get the facts straight so you can appropriately respond and tell your side of the story.
- Publicly acknowledge that you are aware of the issue and are working to resolve it.
- To avoid generating more widespread public awareness of the problem, limit your communications to only those sites and forums where it is already being discussed.
- Be forthright, transparent and human—people are willing to accept and forgive those things to which they understand and can relate.

Additional MarketingProfs Resources

For insight into how other companies have managed social media-fueled dilemmas, refer to the following case studies:

Case Study: How Domino's Managed a Viral Video Nightmare
(<http://www.marketingprofs.com/casestudy/157/?adref=smpgcs>)

Case Study: How Twitter Helped Save Ford From a PR Disaster
(<http://www.marketingprofs.com/casestudy/125/?adref=smpgcs>)

PUTTING IT ALL TOGETHER

You've read this guide and studied the steps. But will these tips and resources work when applied? Of course. Just ask SAS, a business-analytics software provider, which used these steps to guide them along their journey into the social media world.



Case Study: SAS's Leap Into Social Media

When Cary, NC-based business analytics software provider SAS decided it was time to get into the social media scene, there was little question that a few things needed to be worked out ahead of time.

No doubt, there was a desire to start engaging the “right way” and assure a positive company appearance. But of the utmost concern was the need to protect its clients' privacy, to uphold the nondisclosure agreements it maintains with those organizations, and to ensure nothing got in the way of the relationships it had spent decades building.

Although the company's 11,000 global employees were aware of these stipulations, in general, the company felt it was significant enough a concern to warrant an explicit policy detailing how to handle both company and client information online.

“Social media makes it very easy to share something quickly and broadly without thinking through implications,” explains David B. Thomas, social media manager for SAS. “Having guidelines as part of a policy allows us to get that upfront.”

The Process:

SAS took the following steps to develop a comprehensive policy and integrate social media into its business approach:

1. Establishing an internal council.

As a large company, there were many internal groups that needed to feel comfortable about how SAS went about engaging in social media. So the first step was to form a Marketing 2.0 Council, which included folks from legal, marketing, public relations, information services, computer security, online strategy, internal communications, external communications, education, research and development, human resources, and other areas of the organization.

“Our first best practice was getting everyone together in one room,” says Thomas. “This way you can get evidence from the evangelicals, and the evangelicals can see why there are valid reasons to not just forge ahead without planning.”

One decision was to create two new positions—a Social Media Manager and an Integrated Content Manager—to guide implementation and oversee company participation once enacted.

2. Deciding how the company would approach social media.

One of the first council meetings was dedicated to narrowing down where the company's social media opportunities resided—and blogs, social networks, YouTube, podcasts and Wikipedia came out on top. Content syndication was also added to the list since useful content would be essential to the success of the other efforts.

Task forces lead by council members were then assigned to each type of opportunity to research how those properties were being used by leading companies and competitors and to make recommendations around how SAS should react and participate.

After several weeks, the full council convened again to discuss findings and strategy, to agree on priorities and to propose a timetable.

One decision was to create two new positions—a Social Media Manager and an Integrated Content Manager—to guide implementation and oversee company participation once enacted.

3. Instituting a social media policy.

The council worked together to develop a company policy and guidelines, which spoke directly to customer confidentiality among other key issues. It also explained why employee participation is good for SAS and offered best practices for being actively involved. These included:

- Listening to and understanding the community and its standards before participating, and never violating those standards
- Communicating with a casual, personal tone
- Never barging into a community you've never been active in before and immediately trying to sell company products
- Commenting on someone's blog only if you have something useful to share and the community seems receptive to that type of interaction.

The resulting Word document ran several pages long, according to Thomas.

Before its release, all company managers were made aware of the policy with a PowerPoint presentation and video explaining both the specifics and the goals of the new guidelines, as well as the expectations they would be held to as managers. Having always trusted its employees to act as responsible adults, managers were not expected to monitor their staff's social media traffic, per se. They were, however, asked to maintain an open dialog with employees about how much

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time was being spent online and how that activity pertained to the employee's specific duties.

Next, the policy was posted on an internal community site so that it was easily accessible to all employees in all regions. An announcement was made to everyone in the organization via the company intranet and various internal blogs. Thomas visited the different regions to introduce and discuss the guidelines with employees in person. He also presented it at the company's annual Web strategy meeting and communications summit. "We used every channel we knew of to get the message across," he says.

The Results:

Initially, there were quite a few managers who were skeptical about allowing everyone in the company's ranks to get involved in social media—a fairly common reaction. But now, with the establishment of a social media policy, and the inclusion of those skeptics in that process, the objections have essentially ceased all the way up the chain, Thomas says.

The company now hosts well over a dozen external blogs, and a variety of other social media initiatives are being pursued by different areas of the organization.

"We've gone from zero to 30 in about a year," says Thomas, "and we're very optimistic and very pleased, so far."

The Lessons Learned:

The SAS organization learned a few valuable lessons during this process, including:

It isn't too late.

When the company first started discussing social media, the common assumption was that they were already six months to a year behind other organizations. Instead, they were surprised to find out that while others had ventured before them, they were able to quickly catch up once they got involved.

Create a comfort zone.

Forging into a new frontier, you're likely to face some internal resistance. For SAS, companywide involvement and a detailed policy document were key.

"I had to convince people that I wasn't going to be advocating doing anything in social media that would violate existing online conduct guidelines and HR policies. Having that written down gives people a degree of comfort," Thomas says.

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He suggests: “[Have] HR and legal in the room from the start.” Also, “[Resist] the urge to get into an adversarial relationship with them.” He adds, “It’s not such a bad thing to be told to slow down and consider all factors.”

Make it easy for people to understand.

From convincing the decision makers to embrace the social media movement to motivating the younger crowd to join the company effort, Thomas says it’s essential to put it in terms people can relate to.

“If you’re trying to show people why this is valuable, you have to make it real for them,” Thomas says, “you have to step back and understand the mindset of someone looking at this from the outside.”

In drafting policy, too, he says it helps to keep it real, with a human tone and real-world examples that put it in perspective and make it easy to grasp.

Incorporating a high-level summary at the beginning of the policy document and creating supplementary materials that center on specific activities are other ways Thomas has made sure the important points get across.

“It’s important to have a summary to share, to give people the flavor in case they don’t dive into details,” he says. “We also put it out there in chunks so that they can find what they need at the moment [they need it] to meet their objectives.”

Begin as you’re able, then evolve.

SAS was smart to focus its effort initially and ensure it had the right strategy, approach and tools in place before it expanded into other social media initiatives.

Particularly for some of its foreign regions where resources do not permit more than one or two people to lead its efforts in those geographies, Thomas emphasizes the importance of starting small and doing well, ensuring interesting content and a value-added experience for those users, before moving on to the “cool new shiny stuff.”

He also notes that the company’s policy and strategy are not set in stone. They have been tailored to the company’s current needs, but they will be adjusted as those needs progress and as social media itself advances.

IN CONCLUSION

Creating your own social media program requires some work and time, but anything invested will make for a successful program later.



Having spent time reading this guide, you are equipped with the resources to overcome any resistance from your company, a method for appointing your social media team, tips for creating your own social media policy, and even ideas and resources for managing your social media program—and any crisis that may come up. So now that you have all the pieces together, you can set up your own social media policy.

Be sure to keep this guide on hand as your reference for answering objectives and revisiting any steps in your social media program that might need updating.

YOU'RE UP!

Congratulations! You now have a proper understanding of how to develop and implement a successful social media program. Following the framework in this guide takes time, but it will help ensure that your program is both well-founded and risk-adverse.

Remember, you can always find additional insight, inspiration and examples of best practices through the many resources offered on MarketingProfs.com.



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