TIG Social Media Session- Planning Checklist

Pick = What tool do you think your target market uses? How will you find out?

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Pilot = Create and Launch – how will you add value?

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Evaluate = What is your goal? What do you want to accomplish? How will you measure it?

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Adapt/Adjust = What did you miss? What can you change? Ask your clients/customers/friends what they think you should do differently. (This section will be homework.)

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Social Media Policy = a policy that governs how employees use social media as part of their jobs and as representatives of the organization. A policy can also cover how employees discuss the organization on their own social networking platforms. Some things to consider:

For employees using social media as part of their job:

1. State that the policy applies to multi-media, social networking websites, blogs and wikis for both professional and personal use.

2. Postings should not disclose any information that is confidential or proprietary to the company or to any third party that has disclosed information to the company.

3. Postings must respect copyright, privacy, fair use, financial disclosure, and other applicable laws.

4. The policy should clearly articulate the editorial process if one exists.

5. The policy should clearly articulate a protocol for dealing with negative feedback.

For employees discussing the company on personal social networking platforms:

1. If an employee comments on any aspect of the company's business they must clearly identify themselves as an employee and include a disclaimer. The disclaimer should be something like "the views expressed are mine alone and do not necessarily reflect the views of (your companies name)."

2. Postings should not include company logos or trademarks unless permission is asked for and granted.

3. Postings must respect copyright, privacy, fair use, financial disclosure, and other applicable laws.

4. Employees should neither claim nor imply that they are speaking on the company's behalf.

What follows in an example policy put together by Kivi Leroux Miller of Nonprofit Marketing Guide.com. It is a great first step to thinking about social media policy and is included here in its entirety.

Hello,

This **ROUGH DRAFT** Social Media Policy was created using the Policy Tool for Social Media at http://socialmedia.policytool.net. The answers to the interview questions in the tool were crowdsourced through GotoWebinar polling during the April 28, 2010 webinar presented by http://NonprofitMarketingGuide.com on "Creating a Social Media Policy for Your Nonprofit." About 30 nonprofits from across the U.S. participated in the polling.

Do not be a FOOL with the TOOL! Please take this first rough draft and adjust accordingly, in big and small ways, to get the policy that works for your organization. This draft contains some corporate language that should be changed to better match the nonprofit sector. Also carefully review the Enforcement section at the end, which was not part of the interview/polling process.

I recommend reviewing the social media policy in "Social Media, Risk, and Policies for Associations" at http://bit.ly/tmoC0 by SocialFish and Croydon Consulting and especially the section on "Alternative Language for Key Policy Points" for suggestions on ways to improve this draft.

You'll also find many social media policies bookmarked, along with additional guidance, at http://delicious.com/ecoscribe/social-media-policy

Search and replace "OUR NONPROFIT" with your organization's name.

Happy Policy Writing!

Kivi Leroux Miller
Nonprofit Marketing Guide.com

OUR NONPROFIT Social Media Policy

This policy governs the publication of and commentary on social media by employees of OUR NONPROFIT and its related companies ("OUR NONPROFIT"). For the purposes of this policy, social media means any facility for online publication and commentary, including without limitation blogs, wiki's, social networking sites such as Facebook, LinkedIn, Twitter, Flickr, and YouTube. This policy is in addition to and complements any existing or future policies regarding the use of technology, computers, e-mail and the internet.

OUR NONPROFIT employees are free to publish or comment via social media in accordance with this policy. OUR NONPROFIT employees are subject to this policy to the extent they identify themselves as a OUR NONPROFIT employee (other than as an

incidental mention of place of employment in a personal blog on topics unrelated to OUR NONPROFIT).

Notwithstanding the previous section, this policy applies to all uses of social media, including personal, by OUR NONPROFIT employees who are (describe employees who this applies to outside of work as well by title or job responsibilities), as their position with OUR NONPROFIT would be well known within the community.

Publication and commentary on social media carries similar obligations to any other kind of publication or commentary.

All uses of social media must follow the same ethical standards that OUR NONPROFIT employees must otherwise follow.

Setting up Social Media

Assistance in setting up social media accounts and their settings can be obtained from OUR NONPROFIT's (fill in the blank, or delete if you don't want to help employees with this).

Don't Tell Secrets

It's perfectly acceptable to talk about your work and have a dialog with the community, but it's not okay to publish confidential information. Confidential information includes things such as unpublished details about our software, details of current projects, future product ship dates, financial information, research, and trade secrets. We must respect the wishes of our corporate customers regarding the confidentiality of current projects. We must also be mindful of the competitiveness of our industry.

Protect your own privacy

Privacy settings on social media platforms should be set to allow anyone to see profile information similar to what would be on the OUR NONPROFIT website. Other privacy settings that might allow others to post information or see information that is personal should be set to limit access. Be mindful of posting information that you would not want the public to see.

Be Honest

Do not blog anonymously, using pseudonyms or false screen names. We believe in transparency and honesty. Use your real name, be clear who you are, and identify that you work for OUR NONPROFIT. Nothing gains you notice in social media more than honesty - or dishonesty. Do not say anything that is dishonest, untrue, or misleading. If you have a vested interest in something you are discussing, 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 cautious about disclosing personal details.

Respect copyright laws

It is critical that you show proper respect for the laws governing copyright and fair use or fair dealing of copyrighted material owned by others, including OUR NONPROFIT own copyrights and brands. You should never quote more than short excerpts of someone else's work, and always attribute such work to the original author/source. It is good general practice to link to others' work rather than reproduce it.

Respect your audience, OUR NONPROFIT, and your coworkers

The public in general, and OUR NONPROFIT's employees and customers, reflect a diverse set of customs, values and points of view. Don't say anything contradictory or in conflict with the OUR NONPROFIT website. Don't be afraid to be yourself, but do so respectfully. This includes not only the obvious (no ethnic slurs, offensive comments, defamatory comments, personal insults, obscenity, etc.) but also proper consideration of privacy and of topics that may be considered objectionable or inflammatory - such as politics and religion. Use your best judgment and be sure to make it clear that the views and opinions expressed are yours alone and do not represent the official views of OUR NONPROFIT.

Protect OUR NONPROFIT customers, business partners and suppliers

Customers, partners or suppliers should not be cited or obviously referenced without their approval. Never identify a customer, partner or supplier by name without permission and never discuss confidential details of a customer engagement. It is acceptable to discuss general details about kinds of projects and to use non-identifying pseudonyms for a customer (e.g., Customer 123) so long as the information provided does not violate any non-disclosure agreements that may be in place with the customer or make it easy for someone to identify the customer. Your blog is not the place to "conduct business" with a customer.

Controversial Issues

If you see misrepresentations made about OUR NONPROFIT in the media, you may point that out. Always do so with respect and with the facts. If you speak about others, make sure what you say is factual and that it does not disparage that party. Avoid arguments. Brawls may earn traffic, but nobody wins in the end. Don't try to settle scores or goad competitors or others into inflammatory debates. Make sure what you are saying is factually correct.

Be the first to respond to your own mistakes

If you make an error, be up front about your mistake and correct it quickly. If you choose to modify an earlier post, make it clear that you have done so. If someone accuses you of posting something improper (such as their copyrighted material or a defamatory comment about them), deal with it quickly - better to remove it immediately to lessen the possibility of a legal action.

Think About Consequences

For example, consider what might happen if a OUR NONPROFIT employee is in a meeting with a customer or prospect, and someone on the customer's side pulls out a print-out of your blog and says "This person at OUR NONPROFIT says that product sucks."

Saying "Product X needs to have an easier learning curve for the first-time user" is fine; saying "Product X sucks" is risky, unsubtle and amateurish.

Once again, it's all about judgment: using your blog to trash or embarrass OUR NONPROFIT, our customers, or your co-workers, is dangerous and ill-advised.

Disclaimers

Many social media users include a prominant disclaimer saying who they work for, but that they're not speaking officially. This is good practice and is encouraged, but don't count on it to avoid trouble - it may not have much legal effect.

The Communications Director can provide you with applicable disclaimer language and assist with determining where and how to use that.

Don't forget your day job.

Make sure that blogging does not interfere with your job or commitments to customers.

Social Media Tips

The following tips are not mandatory, but will contribute to successful use of social media.

The best way to be interesting, stay out of trouble, and have fun is to write about what you know. There is a good chance of being embarrassed by a real expert, or of being boring if you write about topics you are not knowledgeable about.

Quality matters. Use a spell-checker. If you're not design-oriented, ask someone who is whether your blog looks decent, and take their advice on how to improve it.

The speed of being able to publish your thoughts is both a great feature and a great downfall of social media. The time to edit or reflect must be self-imposed. If in doubt

over a post, or if something does not feel right, either let it sit and look at it again before publishing it, or ask someone else to look at it first.

Enforcement

Policy violations will be subject to disciplinary action, up to and including termination for cause.