

Developing a Social Media Policy



So you've decided to embrace social media. Life is good and the world is a happy place full of brightly blooming flowers, cuddly Disney-esque rodents and a calming musical soundtrack.

Not so fast.

There are a few reality checks that you need before you assume that your old-school rules apply in the fast-paced, "take-no-prisoners" world of Enterprise x.0 (x being the integer of the moment)

First, the good news is that Social media isn't anything new. We've been using "Social Media" since the first hunter dragged a stick through the dirt to tell his buddies where the deer were. Collaboration came shortly after when 'Gronk' stepped in the drawing. "Social Media" is nothing more than using the tools at hand to communicate with others. What's changed is the nature of the tools. Instead of the message being limited to the group around the fire or the participants in a conference room or the listeners of your community radio station, technology now allows literally anyone with a network connection to reach the entire world. Not only that, but the tools also allow the world to respond back. As a tool, it's incredibly powerful. To quote Stan Lee/Spiderman; "With great power comes great responsibility"



With this in mind, the first thing that you need to accept is that you can't stop people from talking about you, your company or your products. Where those conversations used to be limited geographically or by the size of an individual's social network, today's conversations now have the potential to be global in nature. Where a message could take weeks or months to spread (or more likely fade away before it could take hold), today's communications are near instantaneous and can spread faster than a herd of cats in a dog show. Even if you put policies in place to prevent your associates from talking, you can't gag your clients, former associates or even the more motivated associates operating under your radar.



The second scary fact to accept is "**Privacy is dead**". I don't mean personal privacy. But, if you've got more than one employee, your secrets aren't secret anymore. I freak out a lot of recruiters by being able to identify their "confidential" client in the first 15-20 seconds of information that they provide about a potential job. When I'm too busy to return phone calls, I pop off an email to people that have only ever left a name and phone number. When I interview people, they're shocked that I know more about their former company and organizational structure than they do. With a simple search through old job postings, I can even figure out if that last salary that they quoted is in the ballpark. None of this is high-tech hacking. It's Google, some social networking and a little bit of common sense. My point is that it doesn't take a major security breach for people to collect the little innocuous pieces of data that are out there and assemble the big picture. So, you need to figure **out what data needs to stay private and let the rest of it be free**. If you try to lock down everything, your associates won't be able to tell the difference and can't take responsibility for protecting what needs to be safe.

So, to summarize

- This isn't new.
- People talk and share information. You can't stop it. There's just the potential for it to be faster and wider in scope.
- If you try to lock down everything, you'll succeed in locking down nothing. Focus on what's critical.

On to the scary policy and guidelines suggestions....



1. Figure out why you're doing this.]

Are you trying to use social media as a marketing channel? Are you simply trying to identify people to sue if they dare to mention your company in the wrong font size and typeface? Are you trying to save money by spamming people instead of mailing out advertising? If the answer is anything other than "to engage my customers" or "improve communications and collaboration", give up now. People can smell a corporate agenda a mile away and they'll avoid you like a dead skunk. People don't develop relationships with companies. They develop relationships with the representatives of the company. They may get service or information from an IVR system or a nameless generic customer service agent. But loyalty comes from human-to-human experiences and a feeling of connectedness and respect. If you turn your interactions into nothing more than online billboards, self-serving corporate propaganda or robotic pre-scripted responses, you're just destined for the equivalent of the spam filter in whatever medium you touch.

2. Provide value to the customer



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Setting up a presence with nothing but a "Click here to become our fan" button is not providing value. Yet, it's one of the most common use of social media and is arguably the most egotistical and useless approach possible. Imagine walking up to people in a party and saying "Hi, my name is Bob. Tell your friends that you like me" and then walking away. No sane person would ever do this, but hundreds of companies do the online equivalent every day. Provide information, services, resources, advice or even just a human being to respond to the users. Think about what's in it for the customer instead of what's in it for you. It's ok to ask for customers to provide you with something of value in return, but make sure that you remember that this is about building relationships and not exploiting your customer base.

3. Watch out for your users/customers

Even worse than not providing value is putting your customers at risk. Having a presence that's nothing more than an ego board is one thing. Worse is the approach of asking users to sign up for a service for the sole benefit of telling others that they like you. An online promotions company recently sent out an email to a client's customers asking them to become a fan on Facebook in order to enter a contest. They provided links for signing up for a Facebook account and asked users to provide all of their contact information "You ...are providing information to xxxx and not to Facebook. The information you provide will only be used for selecting winners of the Grand Prize". Unfortunately, they didn't tell any of the users that their profiles would be public by default and that they'd need to adjust security settings to keep them private. Whoops. Even when confronted with the oversight, they simply didn't see it as an issue. A similar offense is publishing information about who's online, reading your forums, who recently said they liked you, etc. Sure it's a great ego boost to you and makes your site/feed/blog look active. But it provides no value to your users, probably wasn't an "opt-in" feature and potentially exposes information that your users would prefer to keep private. At a minimum, set a clear expectation with your users before exposing ANY user specific information.

4. Be transparent.

Assume that everything online is public and that you're going to lose control of the data once it's out on the internet. Too many people have been bitten by "private conversations" and "members-only content". The recent issues with Facebook privacy defaults and with Google Buzz should make anyone think twice before participating in online communities and tools. The point I'm trying to make isn't to steer you away from these tools. It's to get you to think about what the real risks are. So what if your product offerings are public. So what if you have a disgruntled employee bitching about how they hate coming to work. So what if people find out that you use BubbaTech Accounting software. If the information doesn't create a real risk for the company and doesn't provide a competitive advantage for someone else, let it be free. Focus on the information that *needs* to be protected and make sure that people understand why. If they know "why", they can make informed decisions. Ironically, you'll find that loosening up your policies can actually improve your ability to protect the important stuff. "Be Transparent" applies only to you and not your customers. Assume that customers want total privacy by default and ask for permission rather than begging for forgiveness when

something goes wrong.

5. Set policies for existing and new online "personas"

Many companies completely ignore the fact that online personas, accounts, postings, etc. are an extension of an individual. They're personal brands that individuals have invested time and effort into. It's becoming increasingly common for associates to join a company and bring with them an existing social network, group of followers or even a complete online presence complete with blogs, vlogs, twitter followers, personal podcasts, etc. The lines between work and personal life are continuing to blur and many don't *want* to have a separate work and personal presence. It may be beneficial to encourage and support these existing online personas (eg: if they're professional, business oriented and don't contain links to "naked photos from the dorm kegger"). It may make sense to create a completely independent "company persona" for CSRs, PR staff or other individuals whose primary job it is to interact with the public. However, for most others, you may be better off publishing an online "dress code" or basic "appropriateness" guidelines and letting them decide whether their existing persona can meet the criteria. No matter which approach you take, you also need to determine what happens to any social network or persona when an individual leaves the company.



6. Set guidelines for representing the company]

If representing the company, do so very publicly and openly. Don't obscure that fact that you work for the company when providing opinions or comments that may influence others' opinions of the company. But don't get caught up in legal-ese. Formal disclaimers and multi-paragraph signatures are like kryptonite to an open conversation. If you're representing your own views and opinions, it's easy enough to make that clear by context or by the use of terms like "I believe" or "in my opinion". In the internet age, only the most pedantic will assume that an individual posting something online is making an official statement on behalf of the company. (notable exceptions being if your ID is something like "XYZCorpPR" or if you're already considered to be a "face of the company". Whether they like it or not, Steve Jobs *is* Apple., Steve Balmer *is* Microsoft and Larry Ellison *is* Oracle. Their views and opinions simply can't be separate from the company). As an individual, you should also be very careful about using obviously crafted "corporate speak". Most online communications should be conversational and not thinly-veiled marketing copy. If you want to define a particular style or voice for the company, that's fine. But allow people to be individuals as well. Remember that relationships are built between individuals and individuals aren't scripted cookie-cutter commodities.



7. Make sure that the external world doesn't become your release valve]

If you have problems internally and there's no outlet or mechanism for dealing with them, they're going to bleed into the outside channels. You need a healthy, open internal environment for people to communicate, vent and get action before you let everyone out into the wild. Your internal environment needs to be mature and supportive or the external forums will become your corporate release valve.

8. Recognize that social media is real-time

Social media provides a faster, more efficient and lower cost channel for communicating with your customers. It can dramatically improve your corporate agility, reduce your time to respond and it can help to avoid the problem of customer issues festering or spreading to others. If you can detect and respond to problems quickly or in real time, Social Media can actually help to reduce risk. Is your latest marketing campaign offensive to the community? Did you get some bad press? Did a customer just get abused by a CSR? Did something that your CEO just said on CNN get misinterpreted? Social media can provide that feedback instantly and provide an opportunity to respond and correct the situation. Even though the initial complaint will reach a large audience, your response can reach the same audience and net you some very valuable reputation building as a responsive and supportive company. The complaints are going to go out whether you're there to see them or not. It's in your best interests to be out there and address them, even if it's with a simple "We're sorry to hear that you had an issue, we'll send you a phone number in a private message and we'll try to help"

9. Create the simplest policies possible and provide continual ongoing education



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I've grouped these together because so many organizations fail to realize how intertwined they are. Most of your communications issues are likely to be addressed in your employee code-of-conduct or employment agreements. What needs to be defined are the basic social media ground rules and how your existing policies apply specifically to Social Media. Your policies need to be simple and consistent in order to avoid confusion, setting the wrong expectations or changing "voice" mid-stream. Once the ground rules are defined, then address the nuances and implementation through education, not through a 40-page policy statement.

You wouldn't send your staff on a sales call or to speak at a conference without making sure that they have the basic skills and that they know what's expected of them. You wouldn't impart that knowledge by just dumping a document or memo on their desk. So, why would you encourage them to engage on your corporate Facebook page, blog or Twitter feed without the same sort of basic training and handholding?

10. Develop and embrace social media mentors

Clearly scope which parts of the company are accessible through what mechanisms and for what purposes. Select individuals in those areas of the company to be empowered to train, support, develop and encourage the use of social media in those areas. Then you can focus on training those individuals and making sure that they understand the nuance and can help make some of the real-time decisions that will need to be made on a daily basis. This requires that you relinquish some control, but if you select the right people and provide the right guidance and context, they can deal with the operational and tactical issues and allow you to maintain control of the strategic direction.

This is a huge area and one that warrants a lot more coverage than I can provide in a single blog posting. Over the coming months, I'll cover more on the topic and hopefully provide you with some additional food for thought. Just keep in mind that Social Media needs to be "Social" more than simply "Media". You'll need to find your own voice, purpose and the value that you'll bring to the table. There's no one single strategy that will work for every company and there's certainly no cookie-cutter policy that will work for every organization. If you want to get it right, you need to talk to your customers, associates and partners. Maybe "Social Media" tools might be a good way to facilitate those conversations.