

Rules of Engagement:
Developing Effective Social
Media Guidelines for Your
Company and Employees



A Cision Executive White Paper
Developing Effective Social Media Policies



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CREATING AN EFFECTIVE SET OF SOCIAL MEDIA CONDUCT GUIDELINES DEMANDS THAT YOU LISTEN TO USERS, RESOLVE CONFLICTING NEEDS, AND REMAIN BOTH OPEN AND ENGAGED WITH INTERNAL AND EXTERNAL COMMUNITIES.

Whether your organization has committed to a social media presence yet or not, it's now readily apparent that it should establish guidelines that spell out the rules and standards of online engagement and behavior. Social media and its impact can't be ignored by anyone. There are millions of online influencers and tens of millions of people who are participating (on and off company time) on social media sites, microblogs like Twitter, or content sharing outlets like YouTube.

Fortune 500 and smaller companies alike have posted their social media code of conduct on public web sites for all to see. If you're charged with developing such a code for your organization, how do you go about doing it?

You can copy and paste from the publicly shared protocols of the big players – and companies such as IBM, Intel and Kodak have been lauded for their groundbreaking thinking in this area. Or you can develop a homegrown set of guidelines that *organically reflects the nature and communications needs* of your organization, its social media communities, and the people who work there.

In reality, you'll probably do both. Although "best practices" are always evolving, no single company will reinvent the wheel, and the basic tenets of good social media communications practice – transparency, responsiveness, rigorous honesty, accountability, civility and mutual respect – will be reflected in every worthwhile strategy. Yet the fundamentally personal and open nature of the social web also means that cookie-cutter or top-down approaches to developing a social media code of conduct may be doomed to failure.

So when it comes to developing social media guidelines, borrow from the best and undertake an inclusive process to adapt them to your organization.

Finding Your Balance

The most admired sets of social media guidelines out there forbid the same range of online felonies (and grave misdemeanors): salesmanship, flackery and partisanship; failure to transparently identify yourself as an employee of the company under discussion – and its evil twin, using phony, "sock puppet" identities to puff up your products or rip the competitors'; and flaming, obscene and hate speech.

But their distinction lies in the way they balance what can appear to be conflicting principles:

- Decentralized and instantaneous communication, vs. the need to speak accurately and authoritatively about issues.
- Openness and information sharing, vs. the need to preserve confidentiality and proprietary information, and protect trade secrets where appropriate.
- Freedom of speech and privacy concerns, vs. the reality that everyone can be a spokesperson (or at least represent their company) on the social web.

Achieving this balance for your organization is the main reason to develop an organic social media code. That's why the process of its creation should be open to a community of all interested parties – the executive suite, communications and marketing, legal, human resources, customer service, product management, and bloggers and power users who may be "official" or "de facto" company spokespeople in social media.

Together, this community can decide answers to critical questions like:

- Who is to speak "officially" about your organization, and about which topics?



- Who are the people who can promptly grant permission to discuss new products and industry trends, and what can you share?
- What's the process for responding to legitimate (and illegitimate) online criticisms of your company or its products? What can you do to prevent (or survive) a Twitterstorm or any social media crisis?
- How can people “authentically engage in the conversation” as individuals without speaking for the company?
- What direction or advice should you offer about people's conduct on personal pages after (and, sometimes, during) business hours?

The final question merits a lot of discussion. The social web is blurring a lot of lines, including those

between the public/professional and private/personal domains. How people deal online with their fellow employees touches on a lot of hot-button workplace behaviors and HR/legal concerns. Harassment, sexual and otherwise, is just one of those.

Plus, when someone is identified with a particular company on a Facebook page, for example, they become one of the faces of that company on the web. So in developing guidelines about employees' private online communication, companies frequently walk a tightrope between free speech and enforcing norms of professional conduct.

The first task in developing social media guidelines, however, concerns the public sphere.

Creating the Guidelines: The Path Cision Took

Cision's North American team had been engaging on the social web both professionally and personally for some time before our company had official social media guidelines in place for employees. Starting in 2007, early adopters were engaging on behalf of the company in blog comments, on Twitter, LinkedIn and other social sites.

They came from across the company – from client services to product management, from research to marketing – and were familiar with our messaging and best practices for engagement with clients, prospects and the media. However, as social media exploded throughout 2008 and 2009, it became evident that our unofficial representation needed some organization, thought and planning.

We formed the Cision Social Media Group, consisting of about a dozen employees with knowledge, passion and excitement about social media. We met (and still meet) several times a month to discuss changes in the social media landscape, Cision's messaging, and our evolving plans for engaging. We outlined how we should respond to fans and detractors alike, who would represent Cision on particular sites, how monitoring would be conducted, and more.

We also took on the task of composing social media guidelines. Although original to Cision, our guidelines were developed through discussion of best practices, research on publicly posted protocols, and consideration of Cision's and our external communities' cultures. Drafts circulated throughout the company (including Human Resources) for feedback and refinement. They produced our current set of nine guidelines.

We tried to infuse them with our culture, our brand personality, and the way we try to do business. And we believe that the process of creating the guidelines has helped all employees carry that culture through to the social web.



Create Clear Guidelines for Public/Official Communication

- 1. Social media is about freedom of expression, authenticity and creating communities.** In considering guidelines about private behavior on social media, authors should start with that principle.
- 2. On the social web, we're all "representing."** Before, it was easier for people to separate the professional and personal spheres. That's not true anymore: Twitter handles and Facebook pages are open to followers and friends from almost every corner of users' lives. When users identify themselves as employees of a particular company, their online comments can be interpreted as on-the-record (if not official) information. Less formally, when their followers and friends include clients, co-workers and competitors, their words and behavior can reflect on their employer. And, of course, every professional on social media needs to maintain a good personal brand – which means monitoring their own online behavior and keeping an eye on their friends-who-tagged-them-in-those-wild-college-party-photos' online submissions as well.
- 3. You can opt to maintain separate Facebook friend lists.** It is possible for users to create different lists of friends to, for example, share more intimate personal details of their lives with college friends, while maintaining a more

businesslike presence for colleagues and clients. Note, however, that for some this smacks of being "two-faced" and violates social media's authenticity principle.

- 4. Assume that all social media communication is permanent and retrievable.** Once those embarrassing party photos or alcohol-fueled tweets are out there, you can't put the toothpaste back in the tube. Accountability applies in both personal and professional online communication as in face-to-face encounters; people must think about what they say and how they say it before they post.

Remember: It's a Living Document

Creating consensus among your social media users and the organization as a whole, and posting the code of conduct, do not signal the end of the process.

While its founding principles may not vary, a social media guidebook is the product of an open process that embraces change. New users from inside your company will seek clarification and change. New norms, standards and best practices will emerge. New social media platforms will be introduced. The feedback loop created by social media monitoring will provide important insights from communities outside your company.

In other words, your set of rules and regulations, like social media themselves, will be dynamic and the dialogue will never end.



Cision's Social Media Guidelines

- 1. Social sites are public.** Your messages on the social web can be read by anyone. You are searchable and what you say can spread and stays online forever. Use common sense. Presume that even if you don't identify yourself as a Cision employee on a particular site, the vast and growing repository of data on the web will make you identifiable to outside parties as such.
Ask yourself: Would I be comfortable with my mother, my boss, or our CEO reading this message?
- 2. If you identify yourself, be professional.** If you choose to include Cision as your employer in your bio or profile on a social site, conduct yourself professionally there. Be transparent and identify yourself clearly as an employee of Cision in any business-related discussions.
Ask yourself: Am I misrepresenting myself and/or Cision?
- 3. Embrace your personality.** Be yourself and feel free to say what is on your mind, but do so respectfully. Connect with colleagues and engage with the public relations community. Provide value, share content, ask questions, and participate in industry conversations.
Ask yourself: Am I contributing to the conversation in an engaging, interesting and productive manner?
- 4. Be nice.** Don't vent, bash or poke fun at people, businesses, companies, brands, competitors, or geographical locations. Do feel free to ask questions and share your opinion in a respectful manner. Think before posting and when in doubt, don't hit "Send."
Ask yourself: Will this message offend anyone, especially a client or potential client?
- 5. Don't sell.** Social networks are great places to identify point-of-need opportunities and generate sales leads, but they are not venues for your sales pitch.
Ask yourself: Would I be annoyed if I saw a competitor say this?
- 6. Mind the competitors.** Watch them, but don't harass them. Follow them, but do not republish their messages. Always view bios or profiles before engaging.
Ask yourself: With whom am I interacting?
- 7. Be the first to respond to your own mistakes.** If you make an error, be up front about your mistake and correct it quickly.
Ask yourself: Have I been honest about and apologized for my error?
- 8. Protect confidential and proprietary information.** Social computing blurs many of the traditional boundaries between internal and external communications. Be mindful of the difference.
Ask yourself: Am I sharing information that is potentially proprietary, a trade secret, or sensitive business practice or strategy?
- 9. Don't forget your day job.** Make sure that your online activities do not interfere with your job.
Ask yourself: If I'm using work time for a discussion via social technologies, is this discussion in keeping with the performance of my job duties?