



Managing Social Media

**Social Media Policy Outline & Time
Management Techniques**



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MARKETING GROUP

Social Media Guidelines & Policies Outline

A compilation of resources and sample policies across corporations and social media experts.

Effectively incorporating social media into your credit union's marketing mix can be a lot to manage. However, with careful planning and monitoring, social media can quickly become a vital part of your marketing strategy. As a first step, employee social media policies and guidelines should be created to protect your credit union's brand and reputation.

Introduction of Purpose for Social Media Guidelines & Policies

- Discuss the Credit Union's reason for the policy and the approach to social media. Because the proliferation of social networks presents a new model of interaction with members, it is important that policies represent the senior management's expectations with regard to its use and the professionalism of the communication.
- Define "Social Media" to make sure employees understand what media you are including. Specify the types of networks your policy encompasses and that the policy is going to be continually updated as new technologies and networks evolve.
- The starter media to include should have blogs, Twitter, LinkedIn, Facebook, and YouTube.
- Describe who the policy is extended to, most often, the entire Credit Union as well as those specific positions that have more responsibility for social media interaction. This can be the call center, marketing, senior management, and member service.

Impact of Social Media on the Credit Union's Reputation

- List the ways to safeguard the Credit Union and what is considered confidential and/or proprietary information.
- Recommend a path for employees to get permission or consult with a manager to determine what is appropriate or what can be a red flag.
- List ideas of what to avoid from discussing competitors to mentioning any member situations. For marketers, the key is to avoid any copyrights or trademarks from other institutions. These include photos, video links, or audio files.
- Caution that in written statements, political correctness and careful choice of words related to personal opinions should be the rule.

Additional cautions should be provided to employees that whether on or off company time, postings need to respectfully represent the Credit Union.



How to Interact in Social Media

- Outline how an employee should identify themselves, proper use of pseudonyms, or the use of anonymous posts. In social media, the best option is to be direct, speak in first person, use their own voice, and be thoughtful in messaging.
- Caution employees to never to ask for any personal member information, move conversations that are specific to offline (phone) or email.
- Define parameters for employee use of social media, whether it is part of their job or on their personal time.
- Be clear about the fact that all activity can be monitored by the Credit Union when it is done on company time. Explain consequences for violating policy including the possibility of termination or involvement in a civil lawsuit.

Constant Transformation

As the social media arena continues to change and take new directions with new technologies, so will the policy governing the use of social media at the Credit Union. The policy will be reviewed on a regular basis and updates, so it is the responsibility of the employee to check back periodically to make sure he/she is aware of the newest aspects of social media usage.

RESOURCES: Disclosure Best Practices Toolkit, Social Media Business Council, www.socialmedia.org; A Corporate Field Guide to Social-Media Policy Development, MarketingProfs.com; **Cisco's Internet Postings Policy – The Platform**, (http://blogs.cisco.com/news/comments/ciscos_internet_postings_policy/)

Time Management Techniques for Social Media

Trying to juggle the attention that social media demands with your other job responsibilities can be quite challenging. To achieve social media success, begin with an understanding of what resources you will need to start and maintain the various social media outlets.

Balancing Your Time on Social Media

Key Decision Areas:

- **Personnel**—Who is a good writer, who has the time to monitor various social media tools, and who can answer questions in the best way?
- **Resources**—What budget is available for the graphic design and programming of micro and mini websites? What IT assistance is available in-house or outsourced to help keep the website(s), video plug-ins, and flash items up to date as well as trouble-shoot problems?
- **Estimated Time Needed to Keep Everything Current**—Consider these estimates as you decide what media to add into your marketing efforts:
 - ◆ **Blogs (3-7 hours a week)**
 - ◆ **Set up a Google RSS Reader like Feedly (Daily: 20-30 min.)** to scan and read through popular industry blogs. Also, don't be afraid to comment on other blogs!
 - ◆ **Be on your blog (Weekly: 3-5 hrs.)**
 - Week before, start thinking about next week's blog posts or topics
 - Keep to a consistent schedule (whether its weekly, daily, etc.)
 - Don't post 3 posts one week and zero the next week – you'll confuse your readers!
 - Keep blog posts to approximately 250 words
 - Don't forget videos, links and pictures!
 - Ask questions to your readers, and respond to their comments
 - ◆ **Check Google Analytics (Weekly: 30 min.)** to analyze blog traffic and inbound links
 - Analyze how popular your posts are – is there a certain topic that draws more interest?
 - ◆ **Social Media Tools (2-3 hours a week)**
 - ◆ **Twitter (Daily 5-10 min.)**
 - Check what people are “twittering” about your company
 - *Tweet Deck* – preset searches for your credit union or competitors, split your main Twitter feed into manageable groups/topics; OR *Twitter Search*
 - *Tweet Later* – can set up auto follow and message, schedule tweets
 - ◆ **Shorten URLs & Keep Track of Click Throughs with bitly.com**
 - Make it easier to get click-throughs to your site and watch to see if there is a certain time or topic that draws more interest
 - ◆ **Facebook (Daily 5-10 min.)**
 - Look at Fan Insights (demographics) & Page Views
 - Check on ad campaign (if applicable)
 - Add your blog URL to the ‘Notes’ section of your business page so it automatically posts new blog entries
 - ◆ **HootSuite**—It's a real time saver since you can connect your Twitter account with your Facebook account, so that both can be updated at the same time! If you really get into social media, you could update up to 30 of your favorite social networks at once!



More...

Balancing Your Time on Social Media

Continued

◆ **Protect Your Brand (Daily 5 min.)**

- ◆ **Google Alerts** – anytime your credit union’s brand name or products/services appears on the web you will automatically be notified via email

Policies & Guidelines

- Create a policy of when and how to use your brand in social media by all employees. Include:
 - Use of the logo and/or brand graphics
 - References to corporate name
- Establish guidelines for those authorized users of the corporate logo and brand or mentions of the name in correspondence.
 - Include Twitter, Facebook, LinkedIn, and other social networks.
- For blogging, consider giving guidelines of topics and length of posts
 - Consider post length of 250 words or less.

Final Tips

- Remember: “Spread ideas and tell stories,” **David Meerman Scott** (www.WebInkNow.com)
- **And...Don't SELL**, but share valuable information that focuses on your members’ needs or concerns.
 - Ideally, items that tie to a product or service!



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