

How to establish and execute social media policies and procedures

By InfoTrust, LLC

Social media is rapidly changing the business landscape.

Often, social media is the job of the marketing department and is not embraced by the entire organization. **In order to be successful**, all departments must collaborate to create an organizational policy that:

1. Empowers employees to become company marketers.
2. Promotes cross-departmental collaboration.
3. Sets legal boundaries and expectations.
- 4. Increases organizational and departmental ROI.**

Here is a **10 Step Process** for creating a winning social media policy.

Step 1 – Identify the initial stakeholders and the preliminary budget.

1. Identify the departments that have a strong need for integrating social media into their business activities.

2. Departmental policy will be driven by how each department plans to use social media.

3. Identify a group of people inside different departments that have the interest and abilities to move social media engagement forward.

4. Establish preliminary metrics to measure your activity and ensure ongoing success.

5. Begin a grassroots campaign to demonstrate the intent and to set the objectives.

Step 2 – Perform an audit of the organizational social media footprint.

1. Your company already has social media presence whether you like it or not.

2. Look at who influences your online presence.

3. Discover the sentiment, and whether the chatter about your brand is positive or negative.

4. Avoid the data vacuum trap – and examine historical data.

5. Segment data by sources, as well as by geo location, language and engagement metrics.

6. Examine – compliments, complaints, expressed needs suggestions.

Free listening tools

1. Google Alerts
2. Social Mention
3. Trendrr
4. Monitter
5. Summize
6. Jodange

Paid listening tools

1. Radian6
2. BuzzLogic
3. Collective Intellect
4. Alterian
5. ViralHeat
6. Scotlabs

Step 3 – Conduct an External Assessment.

1. Examine your market. How does your market compare to other online markets? How does the majority of your market use social media?

2. Perform competitive analysis to understand what your competition does and analyze how they make it work.

3. Identify the demographics of people that use social media to research/buy/talk about your products and services.

4. List websites and blogs that influence the industry you are in, so you can better monitor and track them.

Step 4 – Conduct an Internal Assessment to understand how social media is currently being used internally.

1. Document all company related social profiles in one place.

2. Identify people who are responsible for managing these accounts.

3. Review the content that is being shared, should that information be available to the public?

4. Assign a qualitative score to how each account is performing based on engagement, reach and participation.

5. Perform an integration audit. How are the social profiles integrated together?

6. How are these social media profiles being promoted on and off line?

7. Perform a branding audit. Is the company consistent in how the information is presented across social channels?

8. Review content creation style guide, if one exists.

9. Examine published content. Is there a schedule for sharing company and industry related news? Is the content aggregated and reviewed?

10. Work on creating a standardized guide for content creation and social distribution.

Step 5 – Building a SMET (Social Media Execution Team).

1. SMET should be a cross functional, mixed generational team with different responsibilities and duties.

2. Employees from communications, marketing, HR, recruitment, IT, legal, customer service and other departments should be involved.

3. Hire a CLO – your Chief Listening Officer.

4. Identify how CLO should address different types of information that he/she encounters.

5. You should not limit yourself to one SMET. You may choose to have SMET teams for different departments, brands and functions, as well as for the entire company.

6. Create an application process to identify the best candidates in the organization.

7. Hold SMET meetings that focus on reaching social media goals and objectives.

Step 6 – Create an organizational as well as departmental social media strategy that will drive the process of establishing a policy.

1. Your strategy will now include a buy-in from different employees as well as top management.

2. Do not expect overnight success, but set clear metrics and objectives.

Step 7 – Begin working on establishing employee policies for using social media.

1. Your policies have to be strategy focused. How should employees use social media when they promote, share, communicate, participate, recruit, etc.

2. Develop guidelines that take into account your early company adopters.

3. Provide guidance, advice and training.

4. Build the policies around job performance, not around productivity concerns.

5. Set policies for personal use of social media at work.

6. Set ground rules about transparency, authenticity, privacy and disclosures.

7. Set policies for how each social media platform should be used – Twitter, YouTube, Blogs, Facebook, etc.

8. Establish *What If* scenarios that foresee various instances.

9. Develop etiquette book.

Step 8 – Leverage employee sourcing to allow your employees to become marketers and brand ambassadors.

1. Allow your employees to take charge and become social.

2. Train your superstars.

3. Focus on why. Why are we sharing this, what value are we adding?

4. Measure individual results, and analyze the progress.

5. Let your customers join in.

Step 9 – Measure Your Results

1. Begin with establishing metrics for measuring company's use of social media and the ROI.

2. Work on establishing social media metrics for each department.

3. Establish metrics for measuring employee participation.

4. Monitor social media activity throughout an extended period of time, and build on the results achieved.

Step 10 – Continuous optimization.

Social media strategy will constantly adjust based on a number of factors. Your policy has to reflect these changes and continuously support your company and empower your employees.

Social media integration is challenging, and every company is very different.

We specialize in taking organizations through this 10 step process to leverage social media and to achieve sustainable results.

Call Us Today. We can help your organization become social.

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