



SOCIAL MEDIA FOR GROWNUPS

**Businesses must set policies and ensure governance,
but don't stifle creativity or productivity with too much formality >>**

By Debra Donston-Miller

PLUS Align software tools with social media policy >>



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Status Update

Align Your Software Tools With Your Social Media Policy

Because Debra Donston-Miller's cover story in this maiden issue of *InformationWeek's The BrainYard* is about policy and governance, it doesn't focus much on software tools, nor should it. Still, I want to say a word about the proper role of tools in setting social networking policy for your company and ensuring that you'll be able to follow through.

The point of having a policy is to accentuate the positive, eliminate the negative, and maximize the chance that your organization's social media exposure accomplishes a business purpose. This process often extends to providing employees with guidelines on their personal use of social media, as that reflects on the organization. At a more basic level, it's a good idea to have rules about who can create a branded social media account or page, and who can post to it. Tools issues might be tangled up with those policy issues—for example, tools for monitoring and archiving conversations or tools for staging posts meant for an official branded page in some sort of editorial approval workflow. Tools may help you enforce

a policy, but if you're going to mandate the use of certain tools, that's also a policy issue.

Most organizations underestimate their exposure. In the years when social media interest was emerging from the grass roots, department, division, and product leaders often took it upon themselves to establish branded accounts that weren't recorded on any corporate ledger.

"The social sprawl problem gets worse every month," Constellation Research Group analyst Ray Wang says. "You really have to take control of this now, or you'll have chaos later." The consumerization of IT makes asserting tight control "nearly impossible," he says. "Everyone has their own tools, and they're all free."

Still, the more people you have mixing it up in social media, the broader your collective reach. For example, tools vendor Hearsay Social lets companies with a distributed network of salespeople, insurance agents, or financial advisers get their message out through those local contacts. Depending on whether the organization is in a regulated industry (as well as the personality of the business), those local



DAVID F. CARR

contacts can be allowed more or less freedom to add a personal note or tweak the message for a particular market.

At the same time, Hearsay provides a Rogue Page Finder for flagging stray profiles and pages that need to be shut down or brought into the program. Another vendor, Social iQ Networks, is building its business around those auditing chores. You can also hire a consulting firm to perform a social media audit for you, using its own tools.

You need to know what is or could be going wrong, but it's also a good idea to know what's going right. Dachis Group has created a social media monitoring service called Employee Insight to help organizations identify which workers are most effective as brand advocates.

Understand where you are today with social media compared with where you need to be, and you'll be more likely to choose the right path for both your policy and tools.

David F. Carr is editor of The BrainYard. Write to him at dcarr@techweb.com.



SOCIAL MEDIA FOR GROWNUPS

Every company needs a social networking policy, but don't stifle creativity and productivity with too much formality **By Debra Donston-Miller**

It's hard to believe just how recently social networking has come into the business lexicon. Think back three or four years: Was Twitter part of your marketing plan? Did Facebook or Facebook-like functionality play any role in your customer service initiatives? Were you thinking about implementing systems like Yammer or Jive or Chatter to develop more effective collaboration among your employees?

For many organizations, social networking tools and processes have evolved from small, often grassroots efforts put forth by an evangelical few to initiatives that touch every part of the



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organization. Along the way, companies have realized—sometimes after getting burned—that they need to put some kind of governance in place to ensure that all of their social activity is in keeping with business goals, customer expectations, and specific industry regulations and concerns.

InformationWeek's 2012 [Social Networking in the Enterprise Survey](#) found that 51% of respondents' organizations have an official presence on Facebook, 41% are on Twitter, and 35% are on LinkedIn. When asked which specific internal social networking systems had been running for three years or more, 46% of respondents said online company directories with profiles and photos, 29% said team or company wikis, 23% said company discussion forums, and 15% said internal blogs.

While modern social networking has provided new ways of collaborating and communicating, it has also introduced some new and often challenging problems. Consider this

sampling of social media missteps: An outside social media rep for Chrysler dropped the F-bomb on the car company's Twitter account. Designer Kenneth Cole used Twitter to capitalize on the Arab Spring for his spring collection. Anthony Weiner, at the time a member of Congress, exposed his private parts. And after pulling its ads from a reality television show about a Muslim family, Lowe's made matters worse by not responding to thousands of comments (many of them racially charged) left on its Facebook page.

Many companies just starting external social media initiatives are finding "unauthorized" Facebook and Twitter accounts already created in their names by employees. InformationWeek's survey found that 15% of respondents' organizations had some form of unauthorized Facebook presence; 12% on Twitter and 27% on LinkedIn. These accounts may have been set up with good intentions, but the information being disseminated on

them may not be in line with company goals and standards.

As some of the earlier examples show, companies have felt the ill effects of employees posting inaccurate, profane, or otherwise inappropriate material on authorized accounts, and still others have had their social reputations tarnished by deleting customer comments and complaints instead of responding to them.

Chart The Right Course

The social landscape is still uncharted territory, which is all the more reason for developing a map in the form of a social media policy.

Social media policy is a document or set of documents that describes what is and is not expected of company employees when communicating on social media platforms. These platforms can be externally facing, such as Facebook, Twitter, and LinkedIn, or they can be internal platforms, such as Jive, Yammer, and Salesforce.com's Chatter, that employees

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use to communicate and collaborate.

“At the core of an enterprise social initiative is, I would like my employees to share more, I’d like them to share across traditional boundaries, whether those boundaries are hierarchical or organizational or geographic,” says Rob Koplowitz, a VP and principal analyst at Forrester Research. “The value of information is magnified when it’s shared, and that introduces risk. So if I share information more broadly, am I more likely to introduce a risk in the form of a privacy violation? Am I more likely to introduce the risk of a security breach around intellectual capital? Am I more likely to introduce an issue associated with sharing of information that is highly regulated and shouldn’t be shared?”

Keep Policy Front And Center

When Chuck E. Cheese’s began discussions with marketing company M/C/C about developing a multistage social media campaign, social media policy was at the top of the agenda, says M/C/C’s senior VP of account services, Jim Terry.

“We developed that policy in conjunction with rolling out our Facebook page,” Terry notes. Now Chuck E. Cheese’s is also using Twitter and Foursquare, and exploring the use of Pinterest.



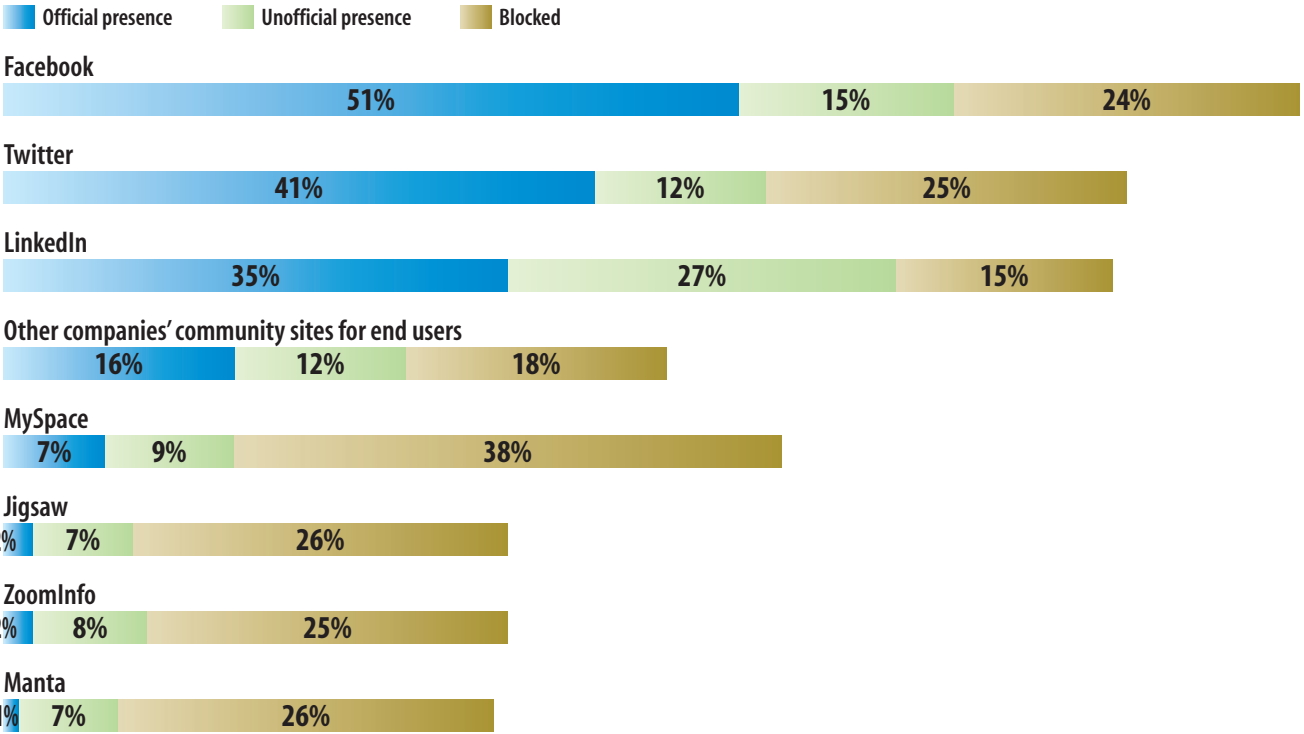
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To Network Or Not To Network

Does your company have an official or unofficial presence on these external social networking sites, or is use blocked?



Data: InformationWeek 2012 Social Networking in the Enterprise Survey 452 of business technology professionals at companies using one or more internal social networking systems, October 2011

Experts interviewed by The BrainYard agree that a strong social media policy tells people what not to do—such as, don’t comment on behalf of the company unless you’re authorized to do so. And it also explains in some detail what “should be done from a legal perspective to protect the company’s assets,” says Jake Wengroff, global director of social

media strategy and research at Frost & Sullivan. “But it also does the opposite, which is to promote and encourage and motivate employees to actually pursue social media. I think that’s a piece of the puzzle a lot of people don’t realize.”

IBM, which introduced social computing guidelines in 2008, counts more than 25,000

of its employees on Twitter, about 300,000 on LinkedIn, and almost 200,000 on Facebook. The company identified from the early days of the Internet how important it is to strike a balance between progressiveness and protections, says Ethan McCarty, IBM's director of digital and social strategy and co-author of those guidelines.

"As these publishing tools and interaction tools were becoming more and more ubiquitous, one of the things that happened was we decided as a company to embrace them in the spirit of innovation and exploration and seeing the potential in them," McCarty says. "One of the things we needed to do, though, was provide the company with some protections in this space and provide individual employees with permission, protections, and guidance on how to do this stuff."

IBM's policy, which grew out of a document on blogging guidelines, was written by a group of about 250 people who were selected for their know-how and participation in social networking. IBM has [published the policy](#). A sample commandment: "Identify yourself—name and, when relevant, role at IBM—when you discuss IBM or IBM-related matters, such as IBM products or services. You must make it clear that you are speaking for yourself and not on behalf of IBM."

McCarty says the document, which involved "a lot of back-and-forth and some really great, spirited de-

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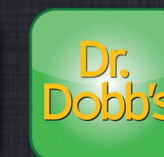
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bate,” took only a few weeks to create and required very few changes after being vetted by HR, legal, and other departments.

Involve Key Stakeholders

Involving stakeholders is key. As Forrester’s Koplowitz puts it, “You don’t want someone from

the company popping up and saying, ‘What’s going on here? I need to shut this down.’”

He continues: “Make sure that the relevant

BASIC PRINCIPLES

A Social Media Policy Template

Social media policies will vary depending on an organization’s size, industry, risk tolerance, regulatory concerns, and other factors. But they tend to have the following basic principles in common.

>> **Remember** that social networking is all about being social. While it’s important to stay safe and legal, the reason for social networking is sharing and collaborating. Be a productive member of the social community.

>> **Be positive.** If you see something you like, say so with a comment. If someone posts content that you think will be relevant to your friends, family, or colleagues, share it. You’ll quickly find that what goes around comes around.

>> **Give credit** where credit is due.

>> **Follow** all general business conduct models and acceptable-use policies.

>> **Be honest** about who you are: Don’t misrepresent yourself.

>> **Only authorized personnel** may post on social media platforms on behalf of the company.

>> **Be aware** when mixing your professional and personal life. Information you post “only” to family and friends can be forwarded or otherwise shared or accessed.

>> **If you come across** comments about the company (negative or positive) on social media, share them with the appropriate company party or parties.

>> **You are responsible** for your own posts and actions, including any that could harm the company.

>> **Understand and comply** with all copyright and fair-use laws.

>> **Do not post** any information that is proprietary to the company.

>> **If you make a mistake**, own up to it—preferably before someone else has the chance to point it out.

>> **Be professional.** Treat the company, its customers, and its competitors with respect in all communications.

>> **Think before you post.** If anything that you have written gives you pause, there is probably a reason. Check with a trusted colleague or, at the very least, wait a bit before posting.

>> **Remember** that the Internet has a long memory. Be aware that what you’re posting will be indexed and searchable.

>> **Don’t pick fights.** Always take the high ground and don’t be sucked in by inflammatory or intentionally provocative comments.

>> **Add value** by providing relevant content, links to information, and so on.

—Debra Donston-Miller

parties—the relevant stakeholders—are aware of what you are doing. So HR should be aware that you’re taking on an enterprise social initiative. Legal should be aware, security should be aware, compliance officers should be aware. There should be a working group that says: What are we doing? Why are we doing it? What are the potential risks?”

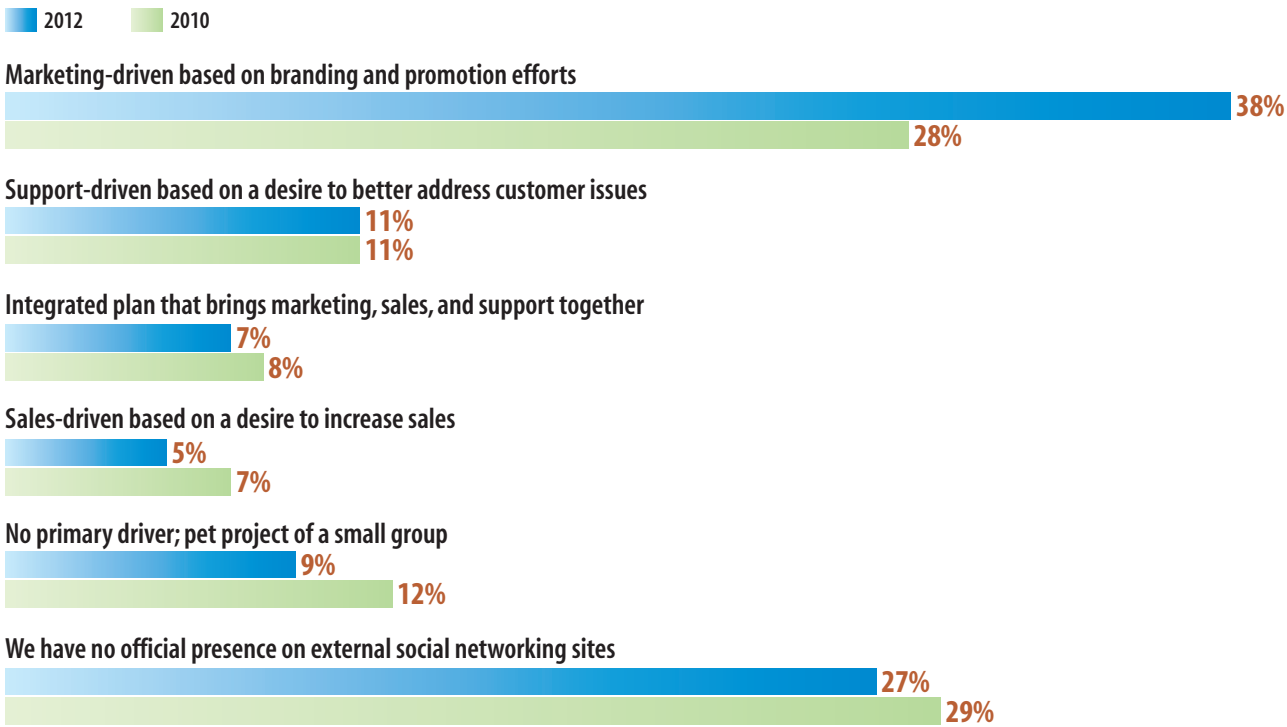
Having not only a mix, but a very high-level mix, of people also signals the importance of social networking, says IBM’s McCarty. “The position of social computing is moving even further into the center of business processes from the periphery,” he says. “Five, six years ago it was pretty easy to identify the bloggers, and now that’s really not the case. Almost

everybody is a participant in the world of social media. Certainly in our industry, whether it’s casual use or power use, basically everybody is online.”

A social business management council at IBM includes senior executives: the chief privacy officer, execs from the CFO’s office who evaluate financial risk and opportunities, a senior HR leader. “That’s an indication of how serious this is to us,” McCarty says. “We think of this as a really legitimate area of business that needs to be actively managed. It’s not peripheral.”

While most experts agree that a social media policy shouldn’t originate from or end up in the legal department, it’s important to have legal’s blessing. In highly regulated industries such as healthcare and finance, compliance officers often have veto power.

What’s The Primary Driver Behind Your Approach To External Social Networking?



Data: *InformationWeek Social Networking in the Enterprise Survey* of 394 business technology professionals in October 2011 and 624 in August 2010 at companies using one or more internal social networking systems

Identify Evangelists

Jill Knesek, head of global security at BT Global Services, agrees that a mix of people should be involved, but she adds that there’s typically a driving factor—and possibly a driving person—behind enterprise social networking. “The department that will benefit the most should be the one leading the charge,” she says. “That’s where you get the

most support and leverage.”

BT, Knesek notes, is a very large, process-driven organization. So whenever a new process is introduced, “you need somebody to kind of hold that document and walk it around and make sure every part of the process is followed,” she says.

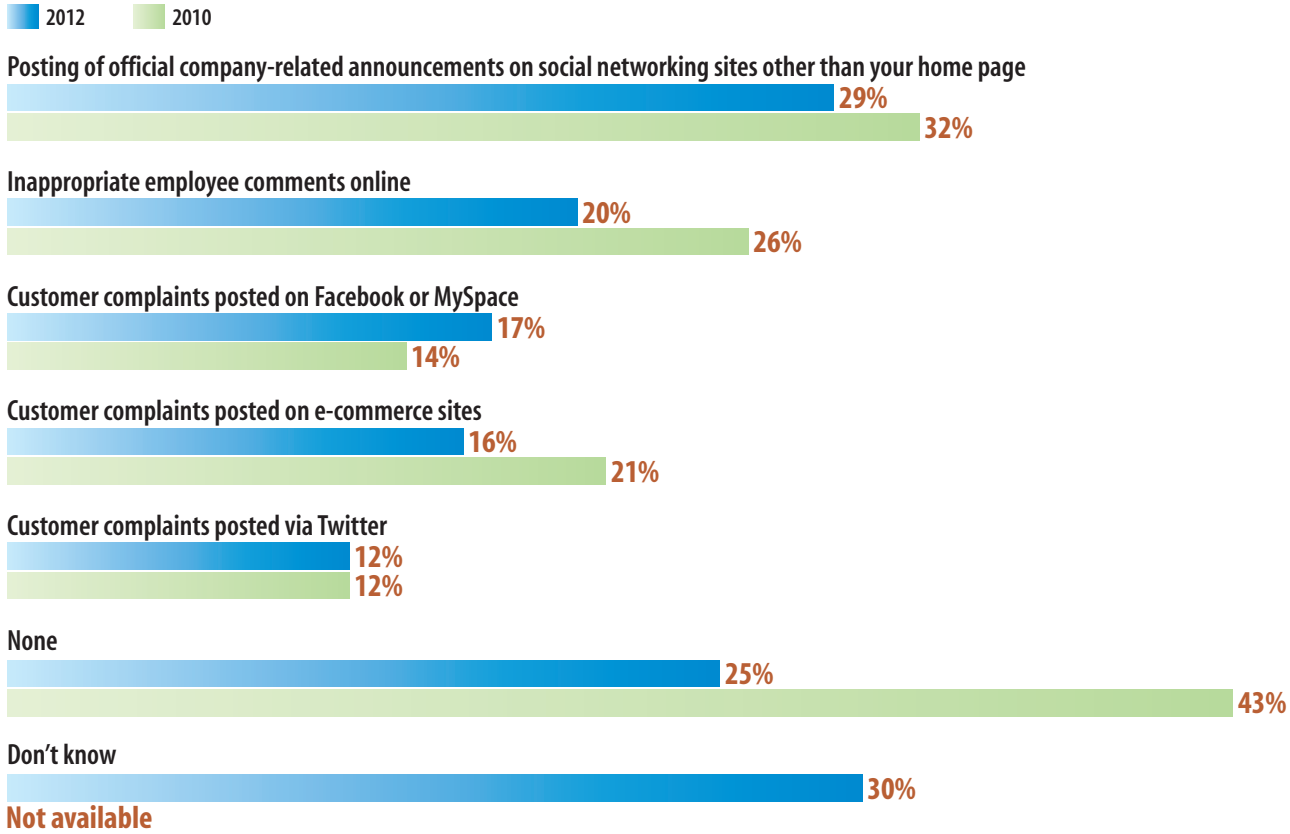
For many companies, that someone will be in the marketing department, the No. 1 driver of external social networking efforts, according to *InformationWeek’s* research. A distant No. 2 is customer support.

Build On Existing Policy

When it comes right down to it, social networking is another form of electronic communications, so many of the same corporate guidelines that apply to email, instant messaging, and blogs apply to social platforms. For example, the dissemination of proprietary company information on public platforms is prohibited; the use of profane or lewd language is prohibited; only authorized personnel may speak on behalf of the company; formal communications must be vetted by a manager. When developing your social media policy, augment and modify such language as needed.

Many companies, especially those in highly

For Which Situations Does Your Company Have A Formal Policy In Place?



Data: *InformationWeek Social Networking in the Enterprise Survey* of 394 business technology professionals in October 2011 and 624 in August 2010 at companies using one or more internal social networking systems

regulated industries, may find that their compliance work will serve them well as they begin to develop social media policy. For example, Chuck E. Cheese’s must adhere to strict federal guidelines around the advertisement of food to children.

“We work in a culture that is very accustomed to brand communication governance, given that kids are our target,” says Scott McDaniel, Chuck E. Cheese’s chief marketing officer. “So it’s a very comfortable area for us. Our founder, who’s still involved in the

company, ... feels a huge responsibility to that word 'wholesome.' So we police ourselves, but the federal government also has a way of being very specific around what you can do and can't do in terms of brand communications with kids."

Don't Let Sleeping Documents Lie

Even after a social media policy has been drafted, revised, revised again (and again), and signed off on, the work isn't over. Just as social networks themselves are constantly morphing, so too must social networking policy be periodically reviewed and adjusted to accommodate new networks, technologies, best practices, and security concerns. Just as companies should involve their early adopters and practitioners in the process of developing a social networking policy, so too should they involve those people in evolving the document, IBM's McCarty says.

Organizations should base revisions on what's working and what's not, on changes to social networks the organization uses (à la Facebook), and to keep up with new social networks (à la Pinterest). Policies should also be revised as the organization's use of and goals for social networking evolve.

Of course, a policy that's changed too often is likely a policy that won't be followed, but companies should seek to review their social networking policy at least annually.

"We think of this as a really legitimate area of business that needs to be actively managed. It's not peripheral." —Ethan McCarty, IBM

At IBM, employees are required to review the company's business conduct guidelines, which include its social computing policy, on an annual basis. The guidelines are also rolled out through IBM's internal Social Business @ IBM site, which provides training in social best practices.

At Chuck E. Cheese's, employees sign and agree to the company's social media policy—developed with the pizza chain's governance group—as they're brought aboard.

"As you can imagine, with 550 locations in North America, lots of people in the field want to comment [on social media platforms]," says Terry of M/C/C, Chuck E. Cheese's marketing partner. "Most of those are above-board and everything's good, but you don't

want people communicating on your behalf who aren't authorized to. So that's part of the training."

BT's Knesek says it's important for companies to not only provide education and ongoing awareness training, but also perform monitoring to ensure that data is being protected. "We try to think beyond the obvious things," she says, "to make sure employees understand their responsibility. It's a combined effort, because social networking policy covers so many different elements."

Companies can deploy a variety of software tools to make sure that employees are following their policies. For example, they can use data loss prevention tools to ensure that employees don't post sensitive data and offensive language on sites such as Facebook and Twitter. Some companies, especially in regulated industries, stage their posts using social media management systems such as HootSuite.

While there are many issues to consider when setting up a social media policy, says Forrester's Koplowitz, "it's probably not as daunting as people fear."

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