



CONQUERING SOCIAL MEDIA

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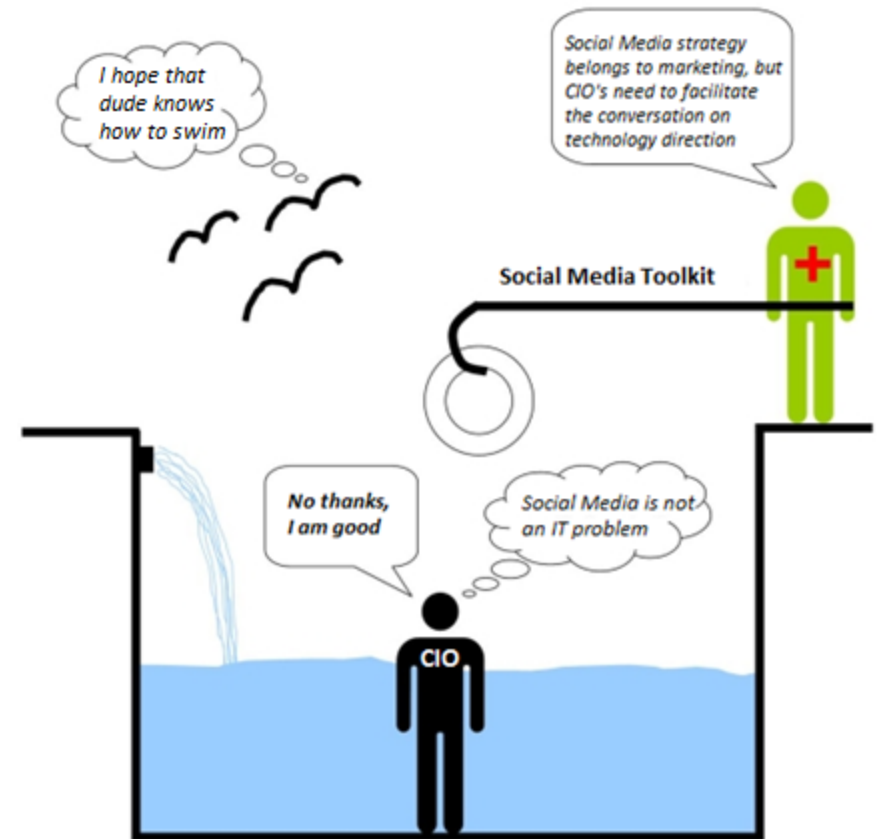
WHO OWNS SOCIAL MEDIA?

- A. Marketing / PR**
- B. Human Resources**
- C. Information Technology**
- D. Legal**
- E. Sales / Customer Service**



SO WHY ARE WE HERE?

- CIOs love technology and Innovation that's why they went into information technology
- CIOs don't want to control everything they just want it to work seamlessly
- Many CIOs cringe at “Social Media” IT brings visions of data breaches, privacy nightmares, and unproductive Gen Y staffers
- History shows, they will own it eventually anyway





CIO'S ROLE IN SOCIAL MEDIA

■ PROVIDE A CROSS-FUNCTIONAL VIEW OF THE POTENTIAL SOCIAL MEDIA USE CASES

- Research shows that social media use is widespread throughout the organization and not limited to professional use in marketing and customer service. The CIO provides a holistic view of where social media can affect the business, both internally and externally, across all business operations.

■ EVALUATE THE BENEFITS AND RISKS OF SOCIAL MEDIA USAGE

- Understanding the range of potential use cases will help identify key areas of risk and opportunity associated with social media. The CIO, in conjunction with the chief information security officer, must help peers in the C-suite weigh the pros and cons of any given policy choice with respect to security and risk.

■ IDENTIFY APPROPRIATE TECHNOLOGY RESOURCES AND SERVICES

- The array of technologies available to monitor social media usage by employees and to record social media traffic for compliance is rapidly expanding. The CIO and the IT team play a pivotal role in helping to decide how technology may be harnessed to support an open social media policy or used to enforce a more restrictive social media policy. Depending on the technologies in use, IT's role may extend to supporting or governing the selection of vendor partners to support the social media strategy.

■ SUPPORT THE EFFORT TO INVENTORY HOW EMPLOYEES ARE CURRENTLY USING SOCIAL TOOLS

- Before drafting the social media policy, it is important to clearly understand how employees are presently using social media and social communities and to determine how employee usage is expected to change as a result of implementing the new social media policy. Although this effort is most likely to be driven by human resources (HR), CIOs can support it by tapping existing application usage reporting and/ or user survey processes.
- Use the lessons of past experience to drive a successful policy rollout. While a new social media policy rollout will most likely be led by the HR team, the IT organization has a role to play. From organizational restructuring to policy implementation to new technology deployment and adoption, most CIOs have had more than their fair share of experience.

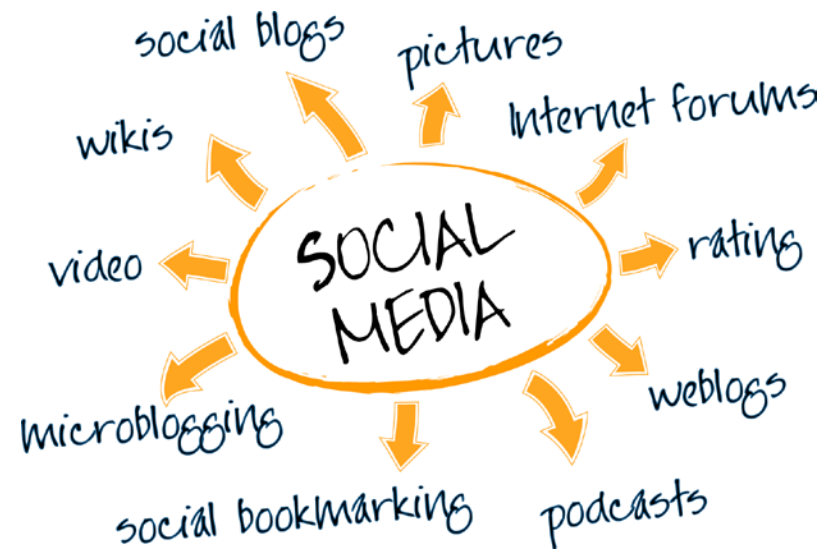
■ BE AN EVANGELIST IN THE C-SUITE

- Many organizations have failed to enact a social media policy because the C-suite lacks an evangelist with the understanding of how critical a strong policy is for an organization's health. Even in organizations with a social media policy, IT and the CIO are often seen as roadblocks to social media usage. CIOs are well-positioned to partner with the chief marketing officer to advocate for the implementation of a social media policy that empowers the workforce for the benefit of the customer and thus redefines the image of IT as an enabler.



SOCIAL MEDIA LANDSCAPE

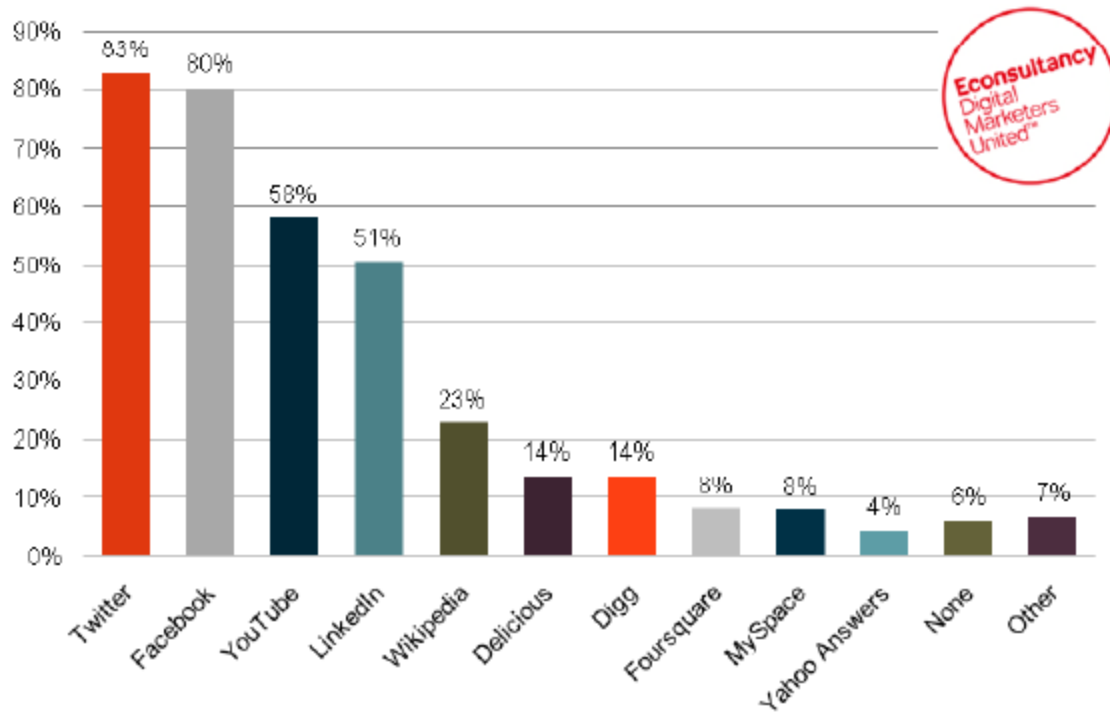
- Online tools creating real-time, relevant, and targeted two-way communication utilized by individuals and organizations
- Examples of social media sites include:
 - Facebook
 - LinkedIn
 - MySpace
 - Twitter
 - You Tube
 - Digg
 - Stumble Upon
 - Blogs





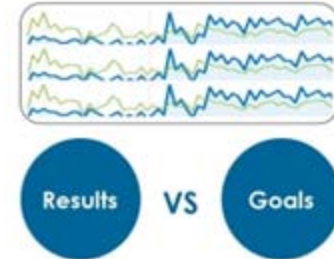
SOCIAL MEDIA LANDSCAPE

Figure 10: Which websites does your organisation use as part of its social media marketing activity?





SOCIAL MEDIA APPROACH



DISCOVERY

Target Audience – Assess audience needs and buying questions that can be addressed through social media
Objectives – What are your goals?
Social Capacity – Assess your ability to create content, maintain social tools and manage your communities
Governance – What social media policies do you want in place?

STRATEGY

Listening – What are people saying about your brand? Listening to stakeholders offers the information required to produce relevant content and shape your social media strategy
Social Tools – Which channels fit your strategy?
Content Strategy – Content is the most important component of a social media campaign. It must be relevant/useful to your target audience and adaptable across social media channels

IMPLEMENTATION

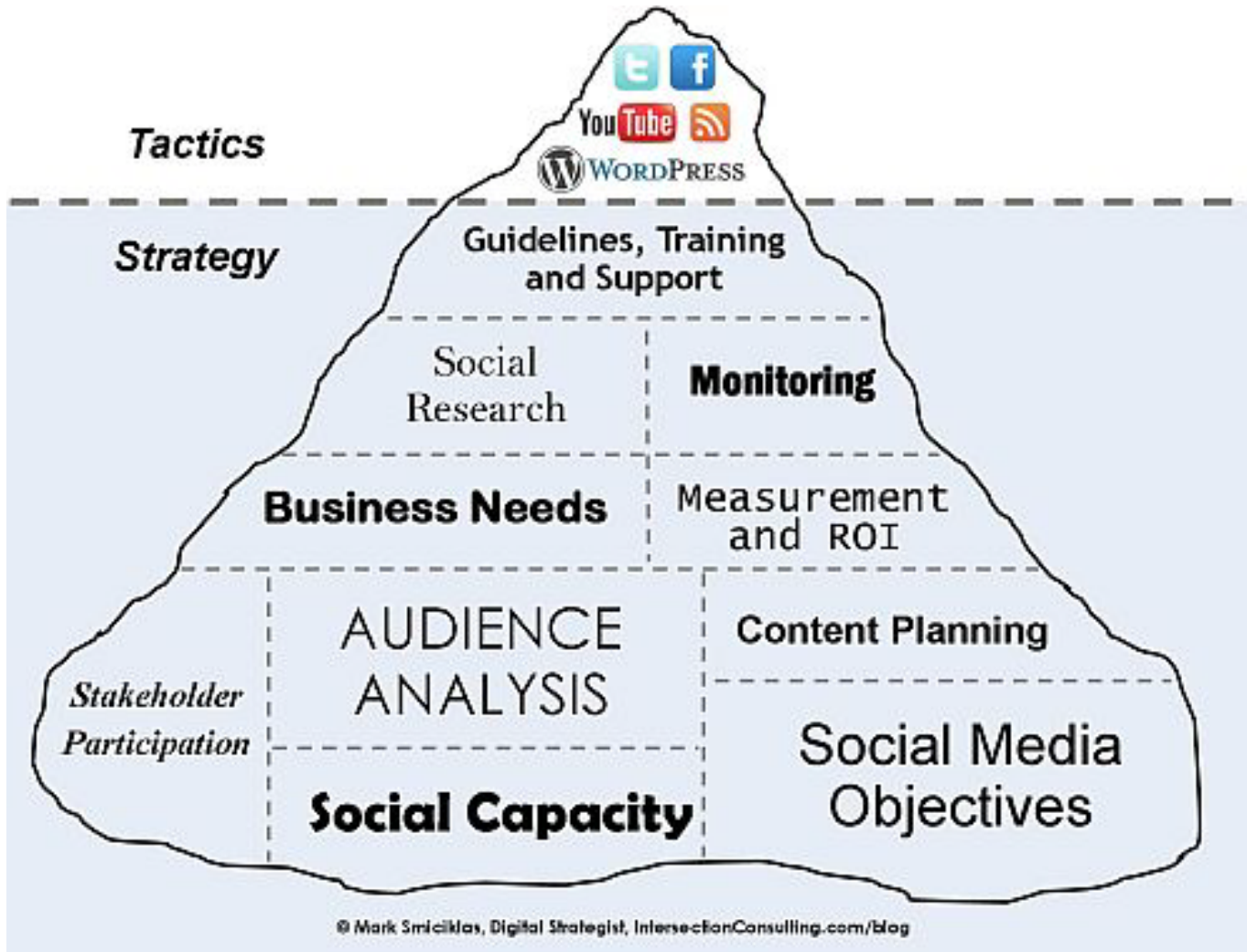
Who – Sponsor, project manager, doer, etc.
What – What content, tools, audience, etc.
When – Timing, frequency, etc.
How – Process, any approvals or review, etc.

MANAGEMENT

Data Collection – Use analytics tools to measure engagement (i.e., leads, sales, page views, visitors, subscribers, followers, fans, comments, etc.)
Results vs. Goals – Measure results vs. objectives; Why did you succeed or fall short?
Refine – Assess data; Adjust your strategy; Test new ideas



SOCIAL MEDIA ICEBERG





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A SOCIAL MEDIA ROADMAP

1. Establish your overall goals and objective(s)
2. Determine success metrics (extent of reach, engagement, influence, etc.)
3. Determine how to measure (reverb, engagement, leads/sales, etc.)
4. Ensure resources are available to support the efforts
5. Research competitors and differentiate your organization
6. Determine the target audience (seniors and adults/children of seniors)
7. Identify the social media vehicle most appropriate for your target audience
8. Create the content strategy (page content, ads, etc.)
9. Monitor and manage information about you and your organization
icerocket.com | google.com/alerts | radian6.com | socialmention.com
10. Repair any disparaging commentary quickly
quickrepair.com | socialmediareputation.com
11. Utilize resources to manage multiple social media sites
hootsuite.com | ping.fm | twitterfeed.com
12. Go slow and do it right (remember to measure)
13. Involve your compliance, legal, and risk officers
14. Conduct a lunch and learn session with your employees



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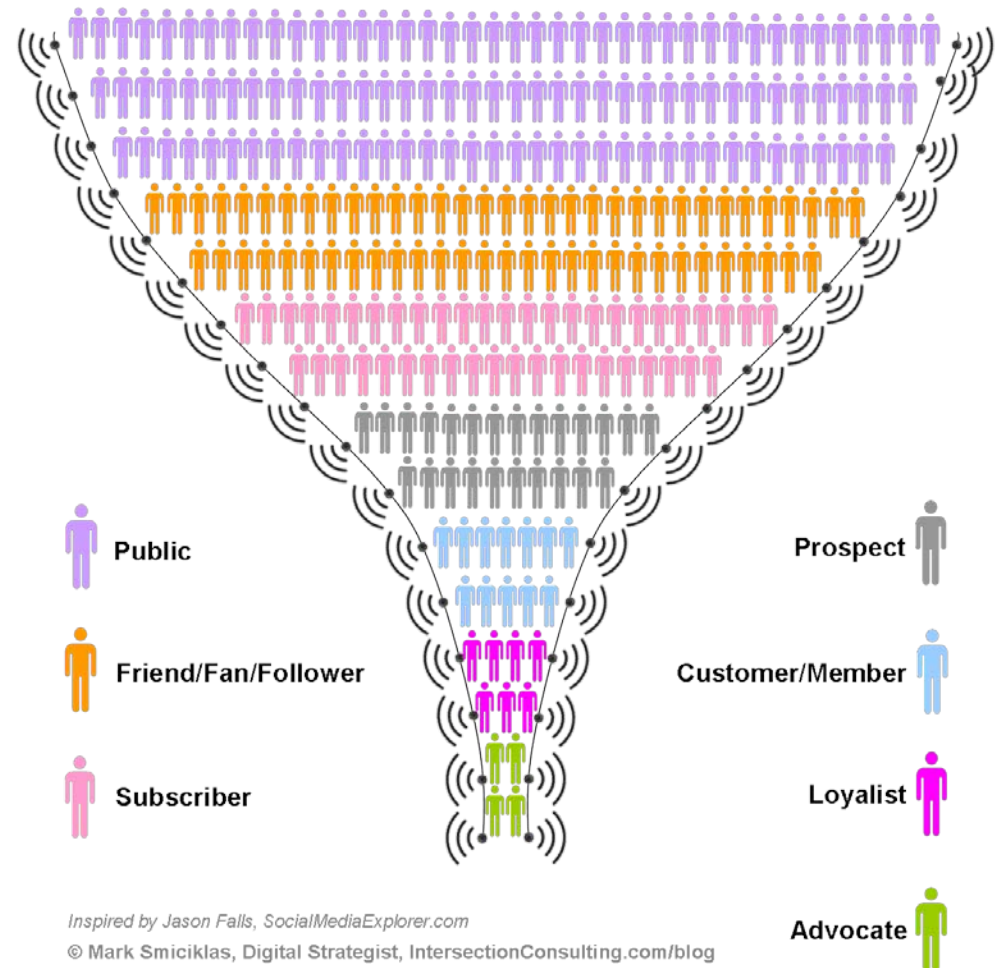
ELEMENTS OF A MARKETING POLICY

- Make a conscious decision whether you want to cross the personal and professional boundaries then act accordingly
- Be mindful of Advertising Rules
- Google yourself and your organization
- Utilize disclaimers and terms of use
- Protect your own intellectual property (use clear placement of appropriate symbols, such as ©, ®, ™)
- Refrain from commenting on third-party posts
- Register your company and C-level executives on common social media sites (manually or knowem.com)
- For marketing services and products, provide links back to your website where all your compliance requirements are being met



THE AUDIENCE YOU WANT TO REACH

- Media
- Individuals
- Organizations
- Communities
- Associations
- Referral sources
- Internal resources





ADVERTISING RULES

- **Advertising vs. Personal Profiles**
 - *Businesses:* If the site is being used for professional use, social media presence and communication can be considered to fall within the advertising rules.
 - *Personal:* Personal use and not intended to market or promote an organization.
- **Guidelines to include in the policy to educate your employees how not to create a professional site unless intended**
 - Employees should not associate the organization's name or email address with the site unless it is intended for professional use. This includes stating they are an employee of the organization.
 - Do not use the organization's assets to update personal sites. This includes any organization owned laptop or computer, I-Phone or blackberry, firm IP address, and email address. Using the organization's email address implies the employee is acting on the organization's behalf.
 - Create an advertising disclaimer to help employees specifically state their use is personal or professional.



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VALUE OF SOCIAL MEDIA

- **Part of the tools used to accomplish your business goals**
 - Building relationships with customers, prospects, and referral sources
 - Keeping a pulse on your organization's reputation
 - Improving web presence through SEO (search engine optimization)
 - Building your brand and credibility
 - Establishing a community and serving as a resource
 - Attracting customers, caregivers, and staff
 - Gathering customer feedback
 - Differentiating from the competition
 - Identifying trends and issues





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WHY IT HELPS YOUR ORGANIZATION

- Expands frequency and reach of your organization's messages and offerings
- Leverages positive relationships of all employees and customers to advance communication effectiveness
- Circumvents filters, "gate keepers", and clutter
- Improves efficiency and cost effectiveness of advertising spend
- Keeps your company top of mind
- Builds incremental "team spirit"



RISKS & CONCERNS - EMPLOYEES

■ Inappropriate Content

- Distasteful/embarrassing posts and comments
- Disparaging remarks about others

■ Disclosures

- Endorsing products/services





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RISKS & CONCERNS - EMPLOYEES

■ HR decisions

- Can you make hiring decisions based on information from social media sites?
- Can you make performance/promotions decision based on information from social media sites?
- How would you handle harassment on personal social media sites?

■ Disciplinary actions

- For employee actions on personal social media sites?
- For derogatory comments related to the company, customers, or other employees?

■ Activity regulation

- Should you regulate activities on social media sites?

■ Personal sites



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CAN YOU STILL BE FRIENDS?

- Laws are behind technology
- May not be able to prohibit, but can blur lines
- Possible workplace harassment
- Recommendations are similar to an employment reference





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GRANTING ACCESS

- **HR issue, not just IT**
 - Privacy, confidentiality, time management, productivity
- **Double standard?**
- **Employees will act the same regardless if they have access or not**
- **Employees can still access via mobile technology**



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... OR NOT GRANTING ACCESS

■ NUCLEUS SURVEY OF 237 OFFICE WORKERS

- 47% regularly log on to Facebook during working hours
- 87% can't define a clear business reason for doing so
- Results in 1.5% in lost production across the entire office
- One survey showed employees spend from 30 minutes to 3 hours/day on sites.





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DATA SECURITY & PRIVACY CHALLENGES

- Data security and privacy
 - Too much information
 - Information breach
 - Too much trust/friends
 - Lack of security
 - Viral impact
 - Virus corruption
- Adequate monitoring
- Misunderstanding and poor judgment
- Rules and regulations



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WHAT ONE POST CAN REVEAL

Today at 11:00 AM I spoke to a bank representative in Old Lyme CT. My checking account had overdrawn, my fault I know, I was not aware of many direct payments going out, insurance, auto, rent, etc. I am a teacher, making only \$23,000 a year and trying to get by. The number of direct payments added up in a few days time and over \$300 worth of over draft charges were accrued. I didn't realize that they had taken so much out of my savings, with the extra deductions for over drafts that I am now well into my next month, after 5 DAYS and about to have all the auto payments take me over again. I will never get out of this. My credit will be ruined by the end of this month and then I have no where to turn. I may be homeless in 2 months.

I begged both the Bank Manager in Old Lyme and Eric in Customer service to just give me a break once. NOW. I asked if he could just take half out, I asked if I could pay by the month. anything to save me.

Now I see another full page add, almost everyday, in the NYTimes. B of A touting themselves and saying how they want a good relationship with the customer.

The local bank would call before they bounced a check and let you have a chance to even borrow the money to save this from happening.

My brothers work for CNN and Turner, should I just put this out for the news on the Government lending? These people want help but won't help a poor consumer.

By tomorrow I will be overdrawn again.

- Where you live
- Questionable behavior
- Profession
- Yearly income
- Information about others without consent



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CUSTOMERS CONCERNS

- Privacy of their personal information
- Posting on behalf of your organization
- Voicing complaints or bad service
 - Doing nothing vs. being proactive
- Competitive information

United Breaks Guitars

The video was posted on July 6, 2009. In its first 23 hours, had drawn 461 comments on YouTube, most of them maligning the airline. Then it went viral. (Over 10 million views so far)



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REGULATIONS

- **Security & Privacy**
- **Disclosure requirements**
 - Policies and agreements
 - Logos (FDIC, equal housing lender)
 - Links to external sources
- **Potential FTC regulations**
 - Writing false business and product reviews
- **Other legal issues**
 - Libel/Defamation
 - Federal securities laws against disclosure of corporate information



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COMPLIANCE & LEGAL

- **Disclosure requirements:** Reg. Z, Reg. DD, FDIC logos, Equal Housing Logo, Insured products, Equal Credit Opportunity Acts & Reg.B, Fair Debt Collection Practices Act, ADAP
- **Records Retentions:** Reg Z & DD (2yrs), FINRA (3yrs), e-Discovery
- **FINRA:** Separate insured and non-insured products
- **CRA:** Comments, reviews, and ratings through social media sites would qualify
- **SEC:** Disclosure of financial information or performance
- **Defamation:** Comments made by others can be attributed to the organization (e.g., Cisco's law suit)
- **Federal Communication Decency Act**
- **Copyright or Trademark laws**
- **Antitrust Laws:** Whole Foods CEO's anonymous posts of competitor Wild Oats



A SOCIAL MEDIA POLICY

- **In addition to your Internet and e-mail policy, create a social media policy for employees and supervisors**
 - Cover all forms of social mediums
 - Incorporate all aspects of social media including marketing and security
 - Use broad language and update frequently
 - Include restrictions on usage (who, when, and why)
 - Do not create an expectation of privacy when online in work e-mails
 - Assign official spokespersons for the organization
 - Have all employees read, acknowledge, and sign off and be encouraged to attend training and contact HR with any issues
 - Include HR-related policies, such as hiring and disciplinary practices
 - Clearly define disciplinary actions for violation of the policy
 - Include restrictions regarding use of organization name, logo, etc.

- **Based on the recent National Labor Relations Board ruling, make sure it does not limit employees from communicating with each other around working conditions, wages, supervisors, etc.**

- **Understand it is an evolving policy and be judicious in how it is enforced**



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COMMON POLICY LANGUAGE

- ❑ Use common sense. When in doubt, do not post it.
- ❑ Identify yourself and organization. State that the opinions are your own.
- ❑ Only post if a subject matter expert.
- ❑ Avoid speaking on behalf of the organization and customers unless authorized to do so.
- ❑ Do not disclose confidential or proprietary information related to clients/patients or the organization.
- ❑ Respect copyrights, privacy, and intellectual property laws.
- ❑ Enforce personal responsibility for posts and subject to liability and disciplinary action if posts are obscene, libelous, abusive, hateful, defamatory, harassing, threatening, create a hostile work environment or are in violation of any other law.
- ❑ Anything posted on the Internet is permanent.
- ❑ If a mistake happens, fix it.
- ❑ Use of social media should not interfere with job performance.
- ❑ Violation of the policy could result in disciplinary action up to and including termination.
- ❑ Include organization indemnification should an issue occur.



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EMPLOYEE EDUCATION

- **Education, awareness, and training**
 - Security and risks
 - Security best practices
 - Personal vs. professional
 - Compliance requirements
 - Impact on organization's reputation



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THANK YOU



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