



# The Anatomy of Engagement Guidelines

**PART ONE: Social Media Policy**



## Where to Begin?



You have heard all the buzz about why a social media policy is important; especially, after an online crisis situation. There are numerous resources available telling you what elements to include in your policy and other supporting documents, but no one tells you why you are including those elements. Or the significance of those elements. Or how all the policy and other supporting documents fit into your social media strategy. Or how to integrate them throughout your organization. What you need is *purpose and context*.

The purpose begins with knowing what you want from participating in social media and developing strategies to engage in the space. Write down your desirables, and align them with your organization's overall business goals. Think in terms of both qualitative and quantitative results that will build your brand over time (vs. having a short term, transactional effect).

Once your organization decides [there is a need](#) for a social media policy, it is time for you to delve into [best practices](#) and scour the web for examples of [social media policies](#). Is your brain full? Overwhelmed and need to know where to start? Let us walk you through the anatomy of a social media policy and other supporting documents you will need to have on hand as you embark your journey into the social media frontier.



# Where to Begin?

## Some questions to consider before we get started:

- 1. What is your scope?** Online interaction is 24/7. Your policy will need to address how the workforce is engaging online during work hours and when they are not at work. Your workforce is representing the organization every time they interact online, even if you have a single “official” voice or limited number of official online spokespeople.
- 2. Will your organization encourage social media use in the workplace?** Trying to prevent or block social networking in the workplace is largely ineffective. Instead, you will be forcing interactions through their mobile devices versus encouraging proper use of tools and engagement. Another item of consideration, if your organization chooses to prohibit social media, how will you monitor?
- 3. Do you want the workforce to identify themselves with your organization when engaging online?** You must make it clear to the workforce that if they engage on behalf of the company, anonymity is not an option. Provide clear guidelines for engagement and disclosure, so that all employees can represent themselves and the company clearly and professionally. By allowing your workforce do what they do best and act as your representative, your organization can gain valuable social capital, credibility, and opportunity.



# Where to Begin?

Some questions continued:

- 4. How does your organization define appropriate business conduct?** Online interaction does not come equipped with a giant eraser, so your employees need to know what's expected of them, and what constitutes positive and professional online behavior. Interactions online can be a permanent reflection of individuals and the organization. Team members should understand that corporate policies are not exclusive of online activity and that their behavior online must coincide with the organization's broader harassment and confidentiality policies.
- 5. How will your social media policy align with company culture and values?** It is easy to pick and choose the elements you want to include in your social media policy based on what you see in published examples, but beware. The elements and way in which this policy is written and distributed should echo who you are as an organization and authentically demonstrate the values and value promise that guides all business decisions.



## What's the diff?

Before we begin getting our hands messy with the anatomy of a social media policy, it is important you get a handle on the lingo and differences of the policy and other supporting documents your organization may find necessary.

It would be best to include a seat at the planning table for your legal and human resources team as you slice and dice the following elements. You will need their guidance in this stage to prevent tears and major headaches in the long run. Trust their expertise, and understand their role is to protect the workforce and the company. Don't limit the planning to a silo group because you'll the skill sets of all departments within the organization to carry out this burgeoning social media plan.





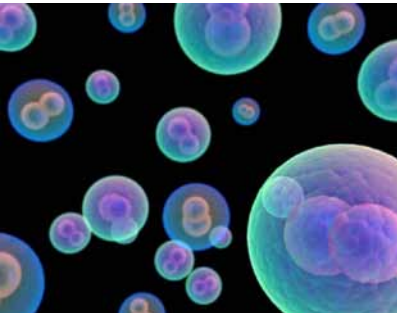
## What's the diff?

- **What's the difference between a social media policy and rules of engagement?** An organization blocking access, by itself, is not a policy, and likely an unrealistic reflection of how employees will use and access social networks. The workforce needs to understand there are certain rules that they will be held responsible to follow, no matter if it occurs online or offline. Rules of Engagement are more guidelines of how to go engage in online interaction and are meant as positive and directional versus exclusionary and enforceable.
- **What is a disclaimer?** A disclaimer is a statement that basically holds you, and all who act as voice on another social media outpost, harmless from prosecution. Check out these [examples of disclaimers](#). Format a disclaimer for the organization's outposts and also for the workforce to place on their own personal sites.
- **What is a moderation policy?** These guidelines should clearly communicate what is permissible on your site or owned web properties, including comments, posts, and content contributions. Setting clear expectations fosters open dialog.
- **What is a privacy policy?** Consumer notification of information policies is a basic element of a marketer's information practices. If you already have an online presence with an organization website, you should already have a privacy policy publicly posted explaining how you safeguard privacy while collecting certain types of information. Simply have a link to your privacy policy available on social media outposts.

We address Rules of Engagement and other supporting elements in The Anatomy of Engagement Guidelines Part Two.



# The Body



Your body is comprised of millions of cells. Just like your body, your organization is a living, breathing organism comprised of a large number of individuals who collectively make your workforce. Similar to the different groupings of cells in your body like lung, brain and muscle cells, there are several groupings of individuals within your organization with varying responsibilities and functions. Yet, all factions are governed by a certain set of processes both stated and implied.

Your organization is bound together by the totality of socially transmitted behavior patterns, beliefs, attitudes, and all other products of human work and thought. Corporate culture is just as big an influence as the policies that govern the body. When drafting a social media policy, it is essential the policy reflect the culture of the organization and existing codes of conduct. The policy will be better received and external engagement more in tune if crafted in the authentic image and voice of your organization.

Existing codes of conduct or policies regarding ethics, technology, harassment and confidentiality are not limited to offline activity. The online presence of your workforce, depending on what they are posting, may violate any number of corporate policies. Establishing a social media policy is a brilliant opportunity to revisit, update, and fine-tune other organization policies and procedures.

Social media policies and guidelines can provide education and structure for how to engage online, and empower your workforce to operate within accepted and encouraged boundaries with the freedom to be themselves.



## The Brain

**Your brain is always working** – even when you are sleeping, your brain controls your heartbeat, breathing and other body functions. Your brain never lies down on the job. This is the duty of your social media policy. Social media is 24/7, too, and so your social media policy should account for that. There is no down time. Interaction takes place at all times of the day and night and your workforce has the potential to be at the center of the conversation despite the fact your chief executives, human resources and legal departments may be snug in their beds.





# The Brain

Your brain consists of three major divisions; each responsible for certain body functions. Similar to your brain, ensure your social media policy covers the following areas:

- **Cerebral cortex:** Similar to your brain, this portion guides thinking, moving and your five senses.
  - Address personal responsibility and judgment.
  - Discourage anonymity and provide proper examples of how to identify self and clearly communicate when engaging on behalf of the organization.
  - Instruct not to cite or reference clients, partners or suppliers without their approval.
- **Cerebellum:** Similar to your brain, this portion helps your organization keep balance and promotes groups working together.
  - Cite and link to relevant existing codes of conduct.
  - Discuss use of disclaimers.
  - Provide education about copyright, fair use, privacy, confidentiality and other financial disclosure laws and proprietary information.
- **Brain stem:** Similar to your brain, this portion maintains routine organization functions like heartbeat and breathing.
  - Promote online etiquette.
  - Define expectations of off hours engagement and activity conducted during the work day.
  - Discuss self-correction.

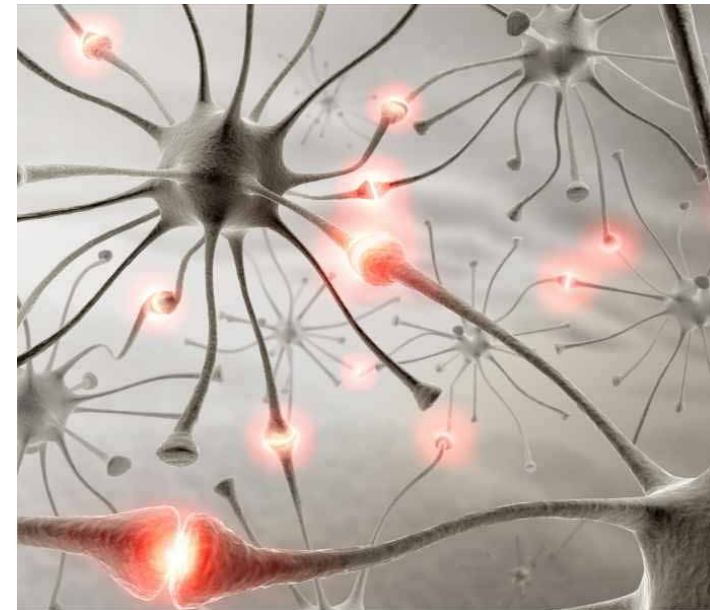


# The Spinal Cord

**The spinal cord connects the brain with the nerves that go to the body.** Small bundles of nerves branch out from each side of the spinal cord. Billions of busy nerve cells are constantly sending and receiving messages from the eyes, ears, muscles and other parts of the body. These nerves represent the many hubs of your organization, and the entirety of your workforce in constant engagement, online and off.

Organizations are being pulled into many dynamic conversations requiring the research and response of more than one department. Tools are only part of the solution. The enterprise must socialize by working together and discussing how online activity provides opportunity for research, business intelligence, and conversation with customers and prospects. Social media belongs to the entire organization because success depends on the combined skill sets of every department.

Buy-in of the social media policy does not just come from the executive management, but also from those throughout the organization who will be the on the front lines of social media interaction. Allow your stakeholders a seat at the table, too, and allow them to weigh in on how the social media policy will affect their work. Take a cue from IBM. In 2005, IBM established a wiki to form a working list of guidelines for IBMers who wanted to blog. The idea has broadened in scope and the collaborated effort has evolved into the [IBM Social Computing Guidelines](#).





# Movement



**If you want to move a muscle, the motor area of your brain sends out a message to move.** The message then travels down the spinal cord and through the nerves that control the muscles. This collaborative effort allows functional movement. Your organization requires this same fluid affinity between the social media policy and those on the social media frontlines representing your organization.

Social media does not change the fundamental behaviors of communication, but *how* we communicate. Rather than focus your guidelines on dominion and control, shift the paradigm and encourage the workforce towards what they *can* do versus what they cannot. It is important to remember the social media policy should not supplant existing codes of conduct, but work in conjunction to promote a safe and healthy business environment.



# The Kidneys

**Every body needs a good waste management system.** Your social media policy is a living, breathing document. Social media is nothing new, but the tools we use to interact online are new and constantly evolving. Your policy needs to change and grow with the times too. Just like the IBM example, the collaborative wiki began as a forum to discuss blogging guidelines, but grew in scope as the engagement tools increased.

Build in feedback mechanisms to your social media policy, allow for flexibility and growth and rid your organization of outdated thought and materials. Allow constructive criticism from inside and outside your organization to assist in molding this living policy. Open dialog will pave the way for a successful roll out of a social media program.





## The Liver



**The liver stores vitamins, helps with digestion, and destroys poisons.** Feedback mechanisms for your social media policy are much more than an avenue for criticism. Just like your liver storing vitamins, mine your feedback on an ongoing basis for golden nuggets of inspiration and store them for later use.

For any feedback program to gain adoption, it's critical to demonstrate actions or changes that happen as a result of that feedback. Team members want to see that their ideas are being implemented, or that their constructive criticism has been heard. The feedback must be a two-way dialog or those gems will trickle in less frequently, if at all. While your organization may not be able to act on every submission, let your workforce know the idea has been received and is being kept to help digest or tackle future issues.



## The Anatomy of Engagement Guidelines Part Two

Your social media policy is drafted. You have the buy-in of your organization. Now it is time to get to work and start engaging on the social media frontlines. Put the policies into play. Continue reading The Anatomy of Engagement Guidelines Part Two for a detailed guide of external engagement.

### Need Help? That's what we're here for.

Stepping into social media is an exciting but very important step for your business. Bridging brands between their offline and online existence is more important than ever before. Hopefully this guide will get you started and give you practical food for thought about how social media can work for you.

Your time is limited, but relationships are always a good investment. Radian6 can help you lay a strong foundation for social media strategy with a comprehensive listening, monitoring and engagement platform, and the expertise to deploy it well. Questions, comments, or feedback for us? Just let us know.

Find us on the web: <http://www.radian6.com>

Follow us on Twitter: <http://www.twitter.com/radian6>

Read the Blog: <http://www.radian6.com/blog>

[Click here to request a live web demo of Radian6.](#)