



# The Anatomy of Engagement Guidelines

**PART TWO: Rules of Engagement**



## Where to Begin?



### 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.

There are numerous resources available telling you what elements to include in your rules of engagement and other supporting documents, but no one tells you why you are including those elements. Or the significance of those elements. Or how the rules of engagement and supporting documents fit into your social media strategy. Or how to integrate them throughout your organization. What you need is *context*.

Let us walk you through the anatomy of your organization's rules of engagement 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. Who are your organization's social media heroes today?** Most likely some of your workforce is already out there on the social web engaging with your customers. Identify these folks, not to make examples of their behavior, but to bring them into the fold and understand how and why they chose to interact online. Embrace their passion, feedback and buy-in.
- 2. What kind of engagement is your organization currently enabling?** Social media is about relationships and is nothing new. What is different are the tools we use to communicate and build those relationships. Research how your organization is already establishing and nurturing relationships (or not) and discover how you learn from and evolve those processes and align social media conversations.
- 3. How will your rules of engagement align with company culture and values?** It is easy to pick and choose the elements you want to include in your rules of engagement based on what you see in published examples, but beware. The elements and way in which these guidelines are 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 external rules of engagement, it is important you get a handle on the lingo and differences of the social media 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.





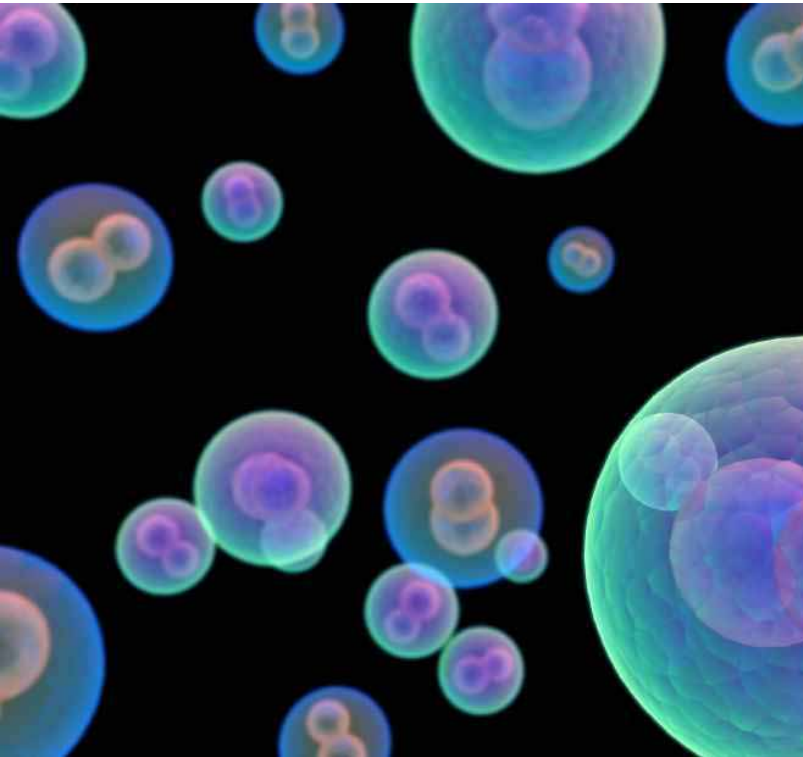
## What's the diff?

- **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 own 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 the elements of a Social Media Policy in The Anatomy of Engagement Guidelines Part One



# 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.

To function, your cells need energy to help the body grow, move, talk, think, and play. The body requires high energy food just as your organization requires sustenance to stimulate the growing power of your workforce. The path your organization chooses to engage online will determine whether your body is partaking of healthy or junk food.

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 Mouth

**Your mouth has thousands of taste buds detecting flavors ranging from bitter, sour, salty and sweet.** A myriad of conversations about your organization, brand and industry are happening with or without your organization's approval or participation. Those conversations range from acidity and to sweetness or like the middle of your tongue, have no taste and are completely neutral in thought. Listen to what is being across the social web and get a feel for the sentiment of existing conversation about your company before participating in social media dialog.

Begin listening by setting up keyword searches for your company name, your industry terms, and your competitors. There are several free tools like [Google Alerts](#), [Twitter Search](#) and [Social Mention](#) to help aggregate the buzz. When you have a social media strategy in place, then you may want to consider graduating to a paid monitoring tool to assist in monitoring and social media engagement.

Determine how your workforce is engaging in social media, discover your true fans and figure out ways to broach dialog and foster opportunities with those who may not be too keen on the flavor of your organization. Get a taste of the conversations happening so you can better begin filtering the relevant conversations and preparing your workforce to engage.





# The Esophagus

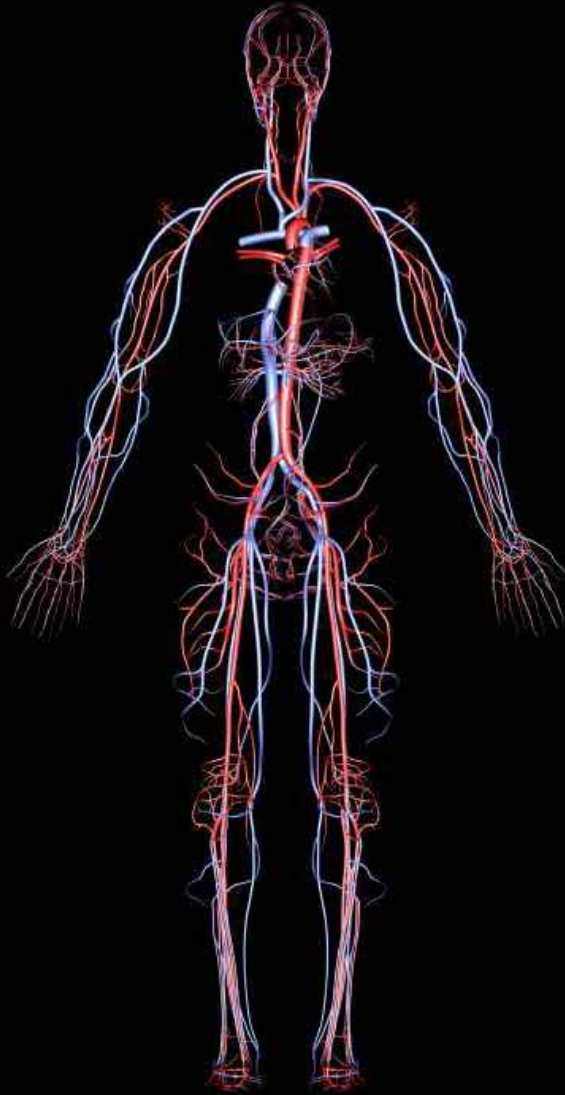
**Food goes to your stomach through the esophagus helped along by muscle actions.** Just like your food, conversations do not just automatically fall into the hands of experienced personnel or departments for engagement, so you'll need to help them along with some guiding forces. As your organization becomes comfortable online, the number of conversations you monitor and engage in will increase.

To assist in streamlining these conversations, some organizations are experimenting with an operator services model. One or several people monitor the frontlines using listening tools, fielding frequently asked questions immediately and pushing those conversations needing a more detailed or experienced answer to the correct people with those skill sets in the organization. This workflow management is very similar to how your body swallows and begins to digest foods.





# The Circulatory System



**Filtering out tasty tidbits from the waste is only the first step along the circulation process your conversations must flow.** Whether your organization is monitoring and engaging in conversations about itself, brand, industry and/or competitors, you will need to develop a method to filter noise and spam from the relevant conversations. Engagement is scalable if there is a workflow that meshes well with your organization structure and if monitoring and response is limited to on topic conversations.

Food is broken down in the stomach into molecules tiny enough for the body cells to use and then transferred into the blood vessels for distribution throughout the body. The conversations happening in social media is viable sustenance for the entire organization. There are golden nuggets of feedback and lessons learned that should be distributed to all departments of your organization. Your workflow management should not be limited to the sharing of engagement, but also the sharing of valuable insights. Pick up these tidbits on a frequent basis and fuel your organization's social media interaction and overall business goals.



# The Circulatory System

With an operator services model and workflow management system, you can also filter out the waste or noise before it hits the desks of those involved on the engagement frontlines or before you overwhelm executives with a useless stream of conversation. Concentrate on the high energy that can be gleaned from on topic, relevant dialog.

The workflow management filters out the the noise we have to sift through internally, but filters are just as important for those social media outposts (Facebook, Flickr, Twitter, blog) your organizations maintains and encourages dialog in those locations. Do not forget to address moderation guidelines/policy and workforce disclaimers. In the same way we get rid of the waste gas, carbon dioxide, in our lungs each time we breathe out, we must be smart and respectful about filtering the conversations encouraged in the organization's social media outposts.

Ensure your organization's moderation/comment policy is concise, friendly and published in plain view. Write the policy to reflect the various groups your organizations expects to have a conversation with. For example, note how [Intel](#) specifically addresses contractors and endorsements in addition to standard moderation guidelines. Disclaimers on workforce social media outposts should be handled similarly. Transparency is key to healthy dialog.

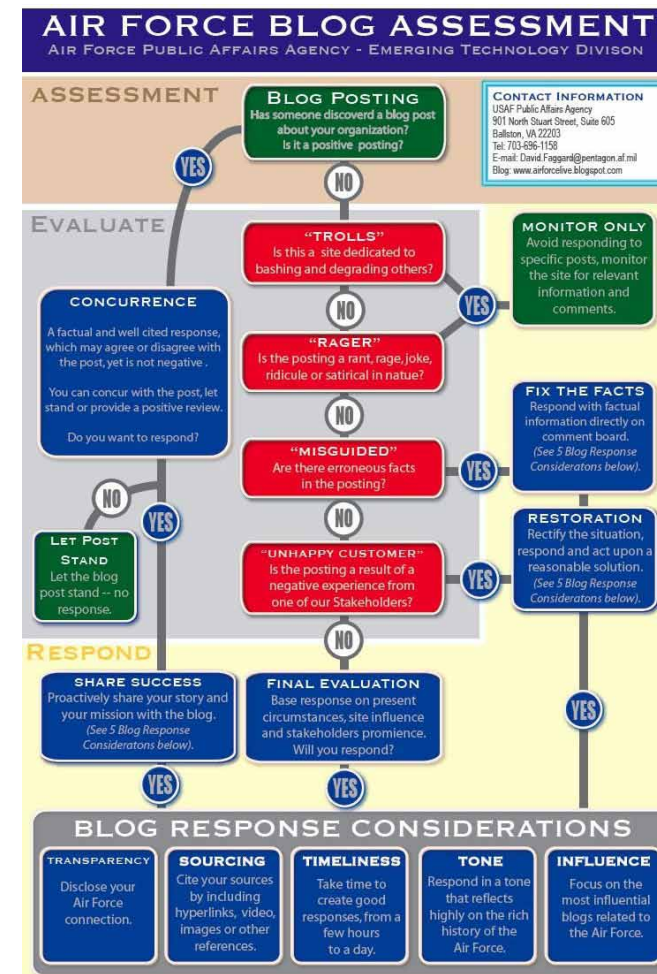


# The Blood Cells

**Blood cells carry all of the important nutrition, oxygen, and substance to the rest of your body.** Once your operator model picks up the conversations for response or insights to share organization-wide, you must use the information you gather through your listening workflow to decide how to engage with the speakers of these conversations, and send that intelligence through the system to act upon.

There are a lot of conversations to juggle and a social media policy and rules of engagement will assist how the voice(s) of the organization should respond. We have all seen examples of businesses not responding to a negative issue with a resolution before the situation spiraled out of control and spread across the Web. Conversely, not identifying and amplifying praise amongst your fans can also damage your organization's online relationships. How do you know when to engage?

Take a cue from the [Air Force](#) and their Blog Assessment flow chart. This process dictates how a conversation is evaluated, determines if response is necessary and clarifies how a response should be handled. The if/then strategy is similar to the blood vessels acting like a pipeline running through your body delivering food and oxygen to the body's cells and carrying waste products away from the cells.

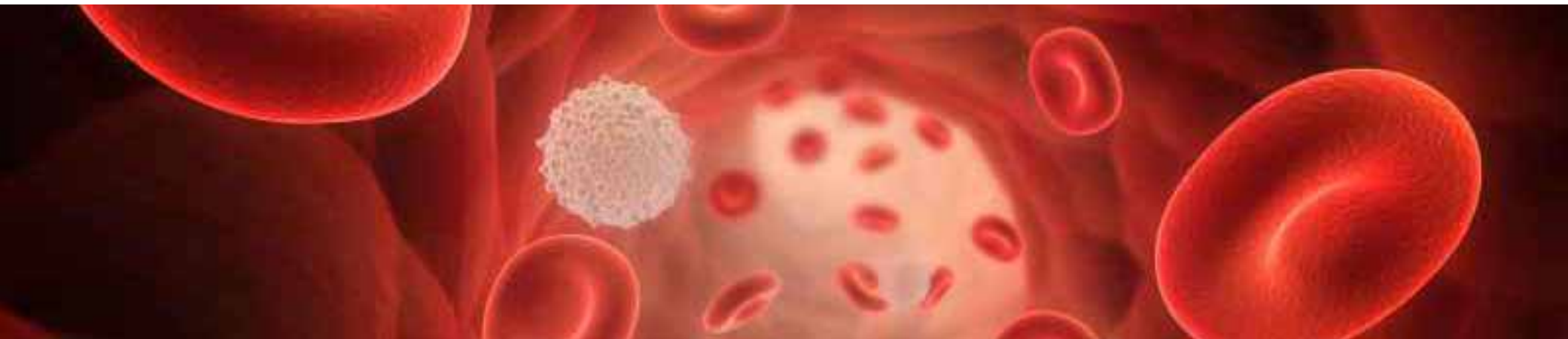




# The Blood Cells

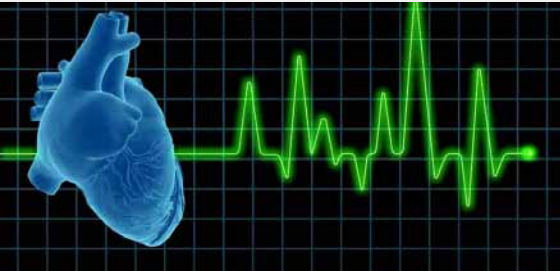
Rules of Engagement come in all shapes and sizes, but all perform the same function. All are guidelines written and communicated in a way not to deter interaction, but encourage open and honest two-way dialog. Even after rules of engagement are deployed, keep a pulse on the conversation ebbs and flows. If your organization provides proper education and resources to those engaging on the social media front lines, like your body's red blood cells, they will be bright red and humming along with oxygen. When they turn a dull red color, you may need to step in and provide a blog writing tutorial or perhaps offer a fun session on how to use a camera or video to capture their thoughts and engagement versus text.

It is extremely important to communicate with the workforce the importance of rules of engagement and other social media processes. Having a workflow and processes in place are like your platelets or proactive steps to help stop the bleeding in times of crisis. These boundaries exist, not to discourage interaction, but to protect them just like the white blood cells that protect the body from unseen enemies and destroy diseases germs.





# The Heart



Your heart pumps used blood into the lungs to get fresh oxygen. It's the central and most critical part of the circulatory system, carrying essential oxygen to and from all the areas of the body to keep all the systems working in harmony.

Whether the heart of your organization's rules of engagement is a [list of core values](#), a [detailed discussion of your social media policy](#) or a book of [tips](#) and [resources](#), your organization is fostering the circulation of new ideas, recycling old ways and pumping out fuel to keep the organization ticking.

It is easy to pick and choose the elements you want to include in your rules of engagement based on what you see in published examples, but beware. The elements and way in which these guidelines and your social media 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.

Determine the purpose of your heart by 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). Your organization's culture, values and social media strategy is the foundation for building healthy online and offline relationships both within your organization and with your stakeholders.



# The Anatomy of Engagement Guidelines Part 1 & 2

Give context to the boundaries your organization chooses to enforce and encourage, so your social media strategies are given the life and longevity they deserve. For more information about how to draft a social media policy continue reading The Anatomy of Engagement Guidelines Part One for a detailed guide of external engagement. Ready, set, ENGAGE!

## 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.

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