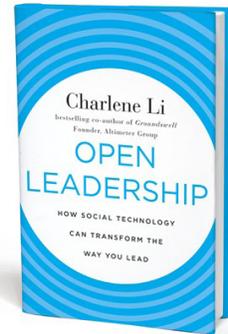


# SOCIAL MEDIA GUIDELINES CHECKLIST

From Chapter 5 of *Open Leadership* by Charlene Li

For more resources, including a directory of policies, please visit [open-leadership.com](http://open-leadership.com).



KEY ELEMENT	DESCRIPTION
<b>Introduction</b>	<ul style="list-style-type: none"> <li>• Encouragement and Support—why social technologies are important</li> <li>• When the guidelines apply               <ul style="list-style-type: none"> <li>• Personal use of social technologies when it’s related to the organization</li> <li>• Using social technologies in an official capacity</li> </ul> </li> </ul>
<b>Guidelines</b>	<ul style="list-style-type: none"> <li>• Identity transparency               <ul style="list-style-type: none"> <li>• When you do/don’t identify yourself as an employee</li> <li>• Definitely when discussing organization-related topics</li> <li>• Potential conflicts of interest that others should know about</li> </ul> </li> <li>• Responsibility               <ul style="list-style-type: none"> <li>• Take responsibility for your own words, don’t post anonymously</li> <li>• Separate your words from your employer’s with a disclaimer</li> <li>• Respect—for clients, fellow employees, and competitors</li> <li>• Don’t let it interfere with your work—“Don’t forget your day job” IBM</li> </ul> </li> <li>• Confidentiality               <ul style="list-style-type: none"> <li>• Remember the confidentiality agreement you signed</li> <li>• Respect the privacy of clients and peers</li> <li>• Emphasize places where confidentiality might slip, e.g. product features, client examples, intellectual property, personnel issues.</li> <li>• List out what is OK to share, what isn’t.</li> </ul> </li> <li>• Common Sense and Judgment               <ul style="list-style-type: none"> <li>• Most important—make it clear there will be areas where it’s not always clear, that there’s lots of “gray”</li> <li>• Ask if unsure</li> </ul> </li> </ul>
<b>Best Practices for Social Media Practitioners</b>	<ul style="list-style-type: none"> <li>• Tone               <ul style="list-style-type: none"> <li>• Have a personality, develop a voice</li> <li>• Err on the side of caution, don’t post when angry or upset.</li> </ul> </li> <li>• Quality               <ul style="list-style-type: none"> <li>• Spelling and grammar</li> <li>• Add value</li> </ul> </li> <li>• Trust-building               <ul style="list-style-type: none"> <li>• Respond to people</li> <li>• Area of expertise—Speak in your area of expertise—Talk about things you actually know about to add value to your content. Even though a post may be primarily your personal opinion, be sure any facts you include are accurate.</li> <li>• Link out a lot</li> <li>• Admit mistakes</li> </ul> </li> </ul>
<b>Oversight and Consequences</b>	<ul style="list-style-type: none"> <li>• When the organization will make requests</li> <li>• Process to follow for managers</li> <li>• Escalation and resolution process</li> </ul>
<b>Additional Resources</b>	<ul style="list-style-type: none"> <li>• HR, Press, and Legal contacts for managers and employees</li> <li>• Training</li> </ul>