



Social Media Guidelines



Social Media Guidelines for Small Business

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Contents

[Welcome](#)

[Introduction](#)

- [Why Have a Social Media Presence?](#)
- [Social Media as a Communication Tool](#)
- [People Use Social Media in Different Ways](#)
- [How Social Media Differs From Other Forms of Media](#)
- [Benefits to Business](#)
- [Determine Your Social Media Goals](#)

[Social Media Channels](#)

- [Facebook:](#)
- [Twitter:](#)
- [LinkedIn:](#)
- [YouTube:](#)
- [Instagram](#)
- [Website](#)

[Social Networking](#)

- [Goals and Objectives](#)
- [Managing Social Media](#)
- [Risk Management](#)
- [The 24-hour Opinion Cycle](#)
- [Threats to IT Security](#)

[Employee Access to Social Media](#)

- [The Importance of Moderation](#)
- [Critical Feedback](#)
- [Mitigating Unmonitored Posts](#)
- [Privacy and Underage Minors](#)
- [What Content Should be Removed?](#)
- [Copyright Violation](#)

[Measuring Your Return on Investment](#)

- [Activity Metrics](#)
- [Engagement Metrics](#)
- [Business Metrics](#)

[Next Steps](#)

- [Sales Training](#)
- [Coaching](#)
- [Networking](#)

Welcome

“Social Media is a suite of online services that facilitates two-way communication and content sharing to enhance a business’s online visibility, strengthen relationships with stakeholders and expand word of mouth advertising.”

Strategez is committed to helping small businesses succeed by developing leadership, management, and sales skills. We are proud to offer resources to support the development of those skills. These **Social Media Guidelines for Small Businesses** are designed to help you succeed in the social media space.

First, there is some background to help you understand the nuances of social media. This ensures that whatever your social media strategy is, it will help you be successful in the social media space.

These guidelines are not intended to provide specific advice for individual businesses. Instead, it's to provide information on a new way to communicate with your stakeholders. These guidelines are also intended to help small businesses recognize the benefits and risks of integrating social media strategies into existing business processes.

After this welcome follows an introduction providing you with an overview of social media.

Finally, you can also download a word template on **Social Media Guidelines for Employees**. This template is designed in a way so that you can make the requisite changes to suit your particular business model and industry.

We wish you the best of luck with your social media strategy and using these guidelines. As always, we are here to help and answer any questions you may have. Our contact details are below.

Here's to your success!

Carolyn
CVO and Founder



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Introduction

According to researchers, Social Media has, and will for the foreseeable future, complement rather than replace traditional marketing communications.

Marketing and communication strategies of organizations can no longer be restricted to 'pushing' information out to customers. Traditional mass media or other traditional marketing and communication tools have given way to a new way of reaching customers. Customers now want to interact, engage, provide their opinion and read others' opinions as a way of building trust, rapport and developing a community. Increasing use of social media is filling this void and allowing this to occur.

Social media can help remove barriers to engaging people, communities and creates the potential to:

- gather opinion on key issues and industry trends;
- receive feedback on services and ideas on how to improve;
- keep abreast of the latest developments in your industry;
- join existing social media conversations, in particular discussions on topics relevant to your business;
- form relationships beyond organizational boundaries, both internal and external to your business; and
- disseminate information to customers and prospective customers in combination with existing channels.

Why Have a Social Media Presence?

Social media encourages dialogue between organizations and the wider community, meaning that the level of control assumed with traditional media is replaced with a deeper level of engagement.

Social media involves any online or mobile platform allowing users to interact, communicate, create, share and discuss opinions, views, news, and information. It also allows participants to build and form online communities with a common interest.

Social media platforms are created and shared by individuals via the internet or other mobile devices (such as mobile phones, mobile tablets, and iPads). Using freely available and accessible websites and services allows users to create and 'post' images, videos, text information, or other multimedia communication.

Successfully using social media tools will provide you with an opportunity to respond to industry and the public quickly and better engage with interested and connected stakeholders.

Apart from providing a valuable adjunct to mainstream media, it is vital that social media be seen for what it is. Social media is a dynamic, interactive platform that engages and connects with customers for the purpose of facilitating two-way communication, interactivity, and ultimately, co-creation of value. This is what sets social media apart from traditional and largely unilateral communication media, including radio, press, collateral, outdoor, and other electronic media. With that, it brings unique attributes to the marketing communication mix that can be leveraged to drive targeted conversations about your brand, your products, and your services.

Social Media as a Communication Tool

Social Media as a communication tool can reflect the themes and messages created for the mainstream promotional thrust. It has the potential to bring continuity, consistency, synergy, and integration across the promotional mix. More importantly, social media also facilitates relationship building with your customers, which leads to trust and brand advocacy.

These are essential components underpinning peer influence and significant experiences in purchasing behavior. Daily usage of this medium will build the frequency of exposure to your brand. It will also provide you with a high-touch interface with prospective customers as well as a rich repository of data regarding the preferences of these cohorts that can be used to shape your messages, frame conversations, and more broadly inform your media and creative strategies for the future.

Integrating social media with advertising, collateral material, sales promotion, personal selling, direct marketing, publicity, and public relations activities is essential to creating a consistent message for customers as well as a cohesive image and position for your brand.

People Use Social Media in Different Ways

Some people create content by informing, leading trends, or look to change the opinions of others. Others might scroll through content and share it with others with or without their own commentary. Other people just look and listen; perhaps they may like something but not necessarily share it with their network.

Social media can be used in business to ask and answer questions, connect with people with similar interests, stay connected with customers and other stakeholders. Additionally, social media allows you to stay updated on various topics that permit you to acquire and enhance your general knowledge and increase business acumen.

As a business marketing tool, social media can create meaningful business connections, gauge customer sentiments, enhance your brand and even acquire new customers or fans.

How Social Media Differs From Other Forms of Media

- it's more accessible, especially those with smartphones;
- you don't need special skills to learn or engage;
- it's instant and available to everyone in your network as soon as you publish something;
- it's interactive and can be used for two-way communication;
- it's volatile as the information remains accessible for a long time; and
- it has the potential for unlimited reach across multiple platforms.

Benefits to Business

Whether small or large, a business cannot ignore having a social media presence anymore, with over 90% of the adult population currently using social media. That also includes your existing and prospective customers. More and more people use social media for the recommendations of others, asking questions, and sharing their experiences (both good and bad). Reviews can make or break a business if not carefully managed.

Social media offers businesses an opportunity to connect and engage with their customers and build lasting relationships in a way traditional media cannot do. It also allows you to generate new sales leads, build brand awareness and manage your reputation online.

Suppose you are planning to use social media for business. In that case, it's important to create a social media strategy first because social media is today's 'word-of-mouth' and needs to be managed accordingly.

Before you launch into setting up a social media account, determine what your business needs are, and, as with any business activity, your social media goals need to be aligned to your overall business objectives.

Determine Your Social Media Goals

Before expending time and effort, decide how having a social media presence will contribute to your business goals. Taking a random approach to social media marketing is called spray and pray marketing - cross your fingers and hope it works. Having social media goals ensures you and your team become focused and take social media networking and social media marketing seriously.

Some examples of social media goals might include:

- building brand awareness and brand equity;
- engaging with your community;
- networking with peers;

- social selling;
- social networking;
- value-added content creation;
- product promotion; and
- community service (news, events, etc.)

Social Media Channels

A marketing plan is an overarching strategy to attract the right potential customers to you to convert them into paying customers. A marketing tactic is how you execute your plan. A marketing channel is a platform you use to spread your marketing method.

The most common social media channels used in digital marketing today are:

- Facebook;
- Twitter;
- YouTube;
- Instagram
- LinkedIn; and
- A website comment and feedback facility

Each tool is used for a different purpose and should be coordinated and integrated to deliver your business communication objectives and benefits. For example:

Facebook:

Facebook is probably the most well-known and commonly used as a personal networking forum to connect with family and friends. Business Facebook pages are becoming more common for promoting events, products and activities, photos, stories, media releases, news, and articles of general interest. Of all the social media channels, organic growth on Facebook is limited without paid Facebook advertising.

Twitter:

With a 140-character limit, Twitter is commonly used for urgent notices, public engagement and opinion pieces, media releases, promotions, employment vacancies, and meeting dates. Hashtags (#) are commonly used, enabling you to search and follow areas of interest.

LinkedIn:

LinkedIn began as a professional network as opposed to Facebook being a personal network and commonly used to connect with other professionals, engage in forums and discussion groups, as well as a recruitment tool.

YouTube:

YouTube is a repository of videos and is used for promotional videos, induction DVDs, and events.

Instagram

If you have a business that benefits from photo sharing, Instagram is growing quickly as a social networking platform for photo sharing, promotions, and events.

Website

Your website has several objectives other than promoting your products and services; it serves as two-way communication, direct feedback, and corporate consultation medium.

Decide what social media channels your intended audience is hanging out and where engagement is occurring. For instance, if your audience is hanging out on Twitter, you might use Twitter to re-direct them back to your Facebook page, website, or blog. Your objective is to engage with the existing community relevant to your business and leverage the social media landscape to increase your audience.

Social Networking

Social networking takes different forms; being a fan, friend, or professional colleague and joining a professional network. The value of social networking is not how many connections or 'friends' are accumulated but the quality of these connections. You might collect lots of 'friends'; however the bigger question is, are they engaged? Engagement is always more important than sheer numbers of connections.

Social networking is particularly effective if you provide a product or service consumers use on a regular basis mainly because they occupy an essential presence in their mind. Social networking can also be used to build stronger relationships with your customers and other stakeholders.

Goals and Objectives

Social media as a marketing tactic should not be used in isolation. Your social media goals must also be aligned to your overall business goals and objectives. Suppose you are using social media essentially to grow your business. In that case, it needs to form part of your overall sales and marketing strategy and resourced appropriately.

Business goals and objective might include:

- build relationships with your target market and the broader community at large;
- be recognized by stakeholders as embracing new technologies, therefore, reflecting the communication channel preferences of your target market;
- increase audience reach and improve the accessibility of your businesses communication channels promoting honest time feedback;
- reflect what you stand for and communicate value to your stakeholders to meet public expectations and enhance your reputation as the premier provider of the goods and services you offer;
- be open, honest, accountable, and transparent when engaging with stakeholders;
- enhance your businesses ability to quickly respond, adjust or refocus communications;
- reach specific audiences on specific issues;
- improve the long-term cost-effectiveness of using social media as an alternative means of communication-saving money on paid advertising;
- reduce dependence on media and counter inaccurate press coverage and;
- lead the community directly to online transactional services, increasing sales revenue.

Managing Social Media

Communicating and engaging with the community via social media tools requires quick, if not immediate, response and direct communication. Failing to respond quickly to feedback or questions has the potential to damage the effectiveness of your social media strategy. Waiting for every statement, post, or 'tweet' to be approved by senior management will be detrimental to the need to respond quickly and effectively in social media spaces.

Therefore, successful social media strategies require trusted employees (administrators and moderators) to have the appropriate levels of authority to understand and manage the risks around the release of information. If information needs further verification or is potentially contentious, administrators must be trusted to escalate issues as appropriate. However, approvals must be timely and efficient to ensure relevancy.

The development of a social media policy and guidelines for employees is, therefore, necessary to guide the use of social media by administrators.

Risk Management

As with any communications strategy, there are benefits and risks in using social media. It is important to adequately assess these benefits and risks. As social media is an evolving area of community engagement, there are inherent risks such as cultural, technical, or reputational, including the following:

- activity in some social media spaces and forums may not be welcome;
- a post by your business may be inaccurate or inappropriate, creating legal or reputational risk;
- some sites may be open to manipulation by interest groups or those with malicious intent;
- user-generated content may be challenging to check for accuracy;
- both negative and positive comments will be published in the social media spaces;
- greater resource requirements than expected due to the increased use of social media to interact with you;
- comments may unintentionally inflame a situation;
- without appropriate planning, information management obligations may not be met (such as state and federal obligations).

There are appropriate mitigations for these risks, hence the need for a ***Social Media Guidelines for Employees and a Social Media Posting Response Chart.***

The most significant risk to you using social media as a communication strategy is the potential for a public relations disaster to occur due to a lack of monitoring outside of work hours.

For example, a post appears at 6 pm on a Friday evening which catches the attention of users. The comment left unmonitored escalates, and social media activity commences. Traditional media covers the social media comments, and the story makes it mainstream media within hours.

Activity increases as it is now fuelled by additional exposure through mainstream media (radio, TV, newspapers). Coverage both online and offline escalates with no response from you. On Monday morning, when employees return to work after the weekend, they discover there is now a PR disaster fuelled by un-monitored social media activity.

To avoid a potential PR disaster, there is a need for your business social media presence to be continually monitored, and where content fails to meet your terms of use, it should be removed (refer *Posting Response Chart*).

The 24-hour Opinion Cycle



Threats to IT Security

There are particular risks arising from links to external websites included in off-topic posts. Strategies will be put in place to mitigate these potential risks – primarily the monitoring of posts that may result in users being blocked and posts being deleted.

Employee Access to Social Media

There are three main ways employees might use social media; personal, professional, or business use.

Personal use of social media is unrelated to work duties. Employees should be made aware of the pitfalls of blurring the lines between personal and business use of social media.

Professional use where employees use social media to develop and further their professional responsibilities within the workplace. This may include researching, joining discussion groups and forums, and sharing content and general networking.

Business use refers to employees using social media to communicate business interests, products, promotions, and events. However, using social media for business use should be controlled to maintain the posts' integrity and mitigate reputational risks.

It is vital to ensure employees are aware of their responsibilities using social media and how the lines between personal, professional, and business use are often blurred, hence having social media guidelines for employees.

The Importance of Moderation

One of the strengths of social media is the ease and speed at which content and posts can be shared. The downside is that you can easily lose control of the content on your social media sites. Sometimes posts are inappropriate, and they need to be dealt with accordingly. Responding to comments posted on social media platforms needs to be dealt with the same as you would respond to comments in person, over the phone, email, or any other channels. Left unattended, comments on social media can escalate and go viral. In dealing with negative postings and feedback, the first thing to do is to identify the type of feedback:

1. Is it a legitimate problem?
2. Is it constructive criticism?
3. Is it trolling or spam?

***Trolling** is when someone posts inflammatory, extraneous, or off-topic messages online with the primary intent of provoking other users into a desired response. **Spamming** is where users repeatedly fill your social media platforms with links to their own site with no relevance to your business or discussion.*

After determining which type of feedback has been received, the next step is to determine how you will respond.

If there is a legitimate problem, it's important to acknowledge this as quickly as possible, apologize if you are at fault, and look to take the discussion offline. If it's a misunderstanding, again, clear this up as quickly as possible.

If it is negative or constructive criticism, the primary rule is to stay positive and not be drawn into a fight with a citizen or user. If you do, the problem will escalate, reflecting poorly on you and damaging your reputation.

If the negative comments are made by your own employees, this may be a breach of policy or code of conduct hence the reason all employees should be made aware of your social media guidelines.

In the case of trolling, inflammatory posts should be immediately removed from your site. Moderation is not a form of censorship, and all constructive criticism should not be blocked or removed. Users do not respond well to censorship, and by blocking or removing their posts or comments, you could be creating even bigger problems for yourself.

Critical Feedback

When operating in the social media space, it's essential to acknowledge that critical feedback will occur on your social media site. Therefore you must embrace transparency by not deleting such critical or negative comments. Your business must be prepared for negative comments and have established protocols that mitigate the damage of such comments or correct misguided or misinformed views.

It should be recognized that if negative comments are being made about your business, people will already be using traditional communication channels to voice such concerns or grievances. At least in the social media space, you have an opportunity to correct or better inform the community at large, thereby building trust and demonstrating that as a business, you are truly listening.

There is also a risk of negative publicity for your business if you don't handle negative comments and constructive criticism well because social media allows these comments to be distributed efficiently and effectively. Should you take the step of removing negative comments or feedback to protect your image, the validity of your social media space will ultimately be questioned.

Providing Social Media Guidelines for Employees will mitigate the deletion of posts that are in breach.

Mitigating Unmonitored Posts

The success of a social media strategy relies on adequate resourcing to continually engage with social media users. While a dedicated resource for the implementation and ongoing support of

your social media strategy may not be possible if you don't have the human resources, it's crucial for your businesses ongoing success to have 'champions' throughout your organization that respond to posts and comments received on their specific areas of expertise.

Social Media dictates any response can be viewed by the broader community, and therefore adequate protocols, and training on how staff must respond to postings on social media spaces is necessary hence the need for social media guidelines.

Privacy and Underage Minors

It is good practice to protect users from illegal and inappropriate content or online bullying. Underage minors are particularly vulnerable (and often naive) when communicating online. They will often upload material that could identify them. Part of monitoring all social media sites is to ensure no identifiable information is published. It's important not to share personally identifiable information that could be used to target this vulnerable group.

Filtering technology can be introduced to flag images or videos that match blacklists of content previously blocked by moderators and administrators, which significantly increases the speed and accuracy of moderation.

What Content Should be Removed?

The objective of your social media strategy is to balance online dialogue. As a general rule, the good, the bad but NOT the ugly should remain. If the content is positive or negative, it should sit as long as it is in context with the conversation regardless of whether it is favorable. If the content is ugly, meaning it's offensive, denigrating, or out of context, then it should be rejected, including:

- Defamatory, abusive, harassing, or hateful statements;
- Bullying, abuse;
- Disclosure of confidential information;
- Conduct encourages unlawful activity, or which otherwise violates the law;
- Obscene images, footage, logos, or avatars; and
- Users with names that include abusive or obscene words.

Copyright Violation

Having a site administrator or moderator checking content before it is posted on social media will greatly reduce the chance of copyrighted material getting published. This can be an area of controversy, especially where it comes to the unauthorized use of photographs and videos.

Measuring Your Return on Investment

It's important to measure your social media goals against certain metrics. With Facebook, for instance, it's easy to measure how many likes you have. The bigger question is; how much are those fans worth to you?

The key to developing good metrics is to measure outcomes against your business goals and objectives. If you did a good job understanding the needs of your business and defining your objectives, the easier it will be for you to establish Key Performance Indicators (KPI's) against those objectives.

When deciding on a KPI, base these on what you can measure; there are three types of KPIs that you could use to measure your social media activity:

1. Activity metrics;
2. Engagement metrics; and
3. Business metrics.

Activity Metrics

An activity metric tells you something is happening. Typical activity metrics are the number of page views, site visitors, fans, or people opting into as a subscriber. KPIs may include:

- Click-through rate (CTR)
- Traffic (total and unique visitors)

Engagement Metrics

Often in social media, we talk about engagement versus fans. Engagement metrics are anything that measures the level of your stakeholder engagement, involvement, attention, and commitment. KPIs may include:

- reposts, retweets, shares;
- page likes, post likes;
- subscriptions – RSS, email;
- downloads;
- mentions;
- response time; and
- comments.

Business Metrics

Business metrics allow you to optimize your digital efforts, compare their results with traditional marketing activities, and decide how to best allocate budgets.

Business metrics could include direct sales through a digital channel, lead generation, or cost savings to existing business processes. One measurement could cost per lead or the number of leads that became paying customers.

If you are running an online forum to generate innovative business ideas from customers, you might measure how many of their ideas did you bring to market? You might also run a survey about how you could improve your product or service offering, then re-run the survey some months you implemented new plans.

What was the business value achieved, perhaps in terms of new sales, better customer retention, or increased market share? These may be financial measures or established KPIs used across your business.

- Customer satisfaction, reduction in customer complaints, customer loyalty;
- Attendance at events – an effective way of tracking how effective your call to action is;
- Service growth including leads and lead qualification as well as sales;

Next Steps

Sales Training

Strategez for Success offers both online and in-house sales training. [Contact us](#) to find out more about taking your sales to a new level where you close more people, more often turning prospects into customers.

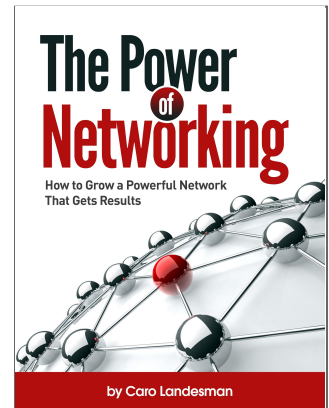
Coaching

Check out how the [Strategez for Success Coaching](#) model can help you achieve your personal, professional, and business goals faster. A life coach or business coach takes you to places you wouldn't go on your own where you get to thrive, not just survive!

Book a no-obligation [FREE consultation here](#) to find out if coaching is right for you.

Networking

If you want to significantly grow your network to prospect for new business, this e-Book will show you how. Learn how to develop a networking strategy that works. Gain tips on how to work the room effectively and what to say when you meet others for the first time. Grow your confidence and learn how to network like a pro. [Check out the book here!](#)



Fantastic – you are good to go!

For more weekly Strategez for Success, go to <https://www.strategez.com/blog/#>

Feel free to share this toolkit with others.

Sincerely

Caro

Carolyn (Caro) is an inspirational leader, motivator, and founder of Strategez for Success. Caro holds a Master's in Business Administration (MBA), is a Certified Practitioner of Neuro-Linguistic Programming (NLP), a Sales Trainer, Life Coach, Business Coach, and author. She provides easy-to-follow Strategez to help you achieve your personal, professional, and business goals.

