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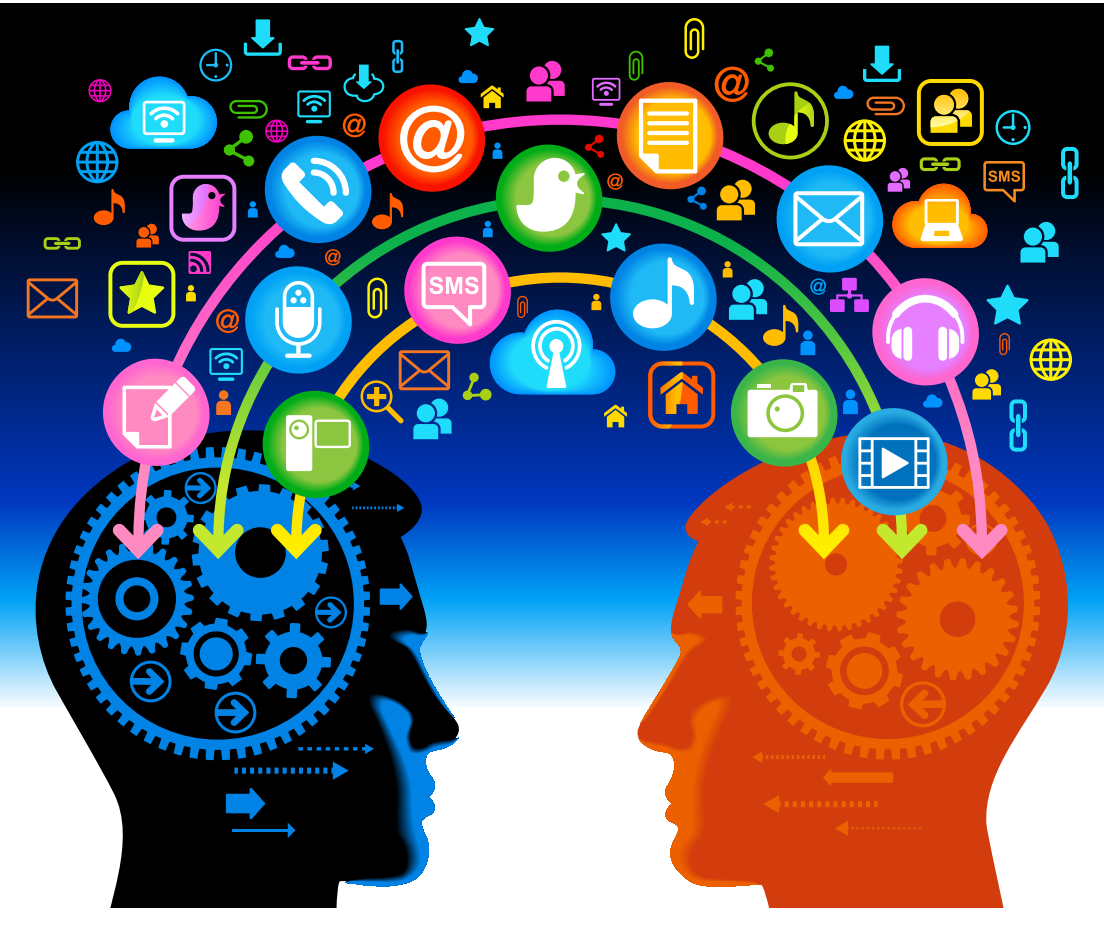
Special Report Series

A Manager's Guide to Designing a Social Media Strategy



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Special Report Series 2012

A Manager's Guide to Designing a Social Media Strategy

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Table of Contents

Why a Social Media Strategy? 3

Part I: Crafting a Social Media Strategy 4

Part II: From Strategy to Action—Social Media Tactics 7

Part III: Government-Wide Resources 10

Other Resources 14

To Contact the Author..... 16

Why a Social Media Strategy?

The 2009 White House Open Government Directive requires all federal government agencies to "*open new forms of communication between government and the people*." In response, agencies quickly adopted a wide range of social media platforms, such as blogs, wikis, webcasts, and social networking sites, that have become popular channels to increase participation, transparency and collaboration of government agencies with the public. However, there were few government-wide standards. In June 2011, the Government Accountability Office (GAO) therefore released a report urging federal agencies to set up policies and procedures for managing and protecting information they access and disseminate on social media platforms (GAO-11-605).

Social media encourages widespread spontaneous use and the platform providers frequently change the technological features. Government agencies therefore need to develop clear guidelines so that social media administrators, lawyers, public affairs officials, etc. are all on the same page to avoid violations of and compliance with existing laws and regulations.

This *Manager's Guide* is designed to provide a quick overview of issues agency managers need to address as they engage in the social media world. It is organized into three parts. The first part outlines the main components of a social media strategy. The questions posed in this section can be used to help design an organization's social media strategy. The second part presents tactics that government organizations can use so that social media can help fulfill the mission of their organization. The final part presents support available from the General Services Administration (GSA) to assist agencies in their social media activities.

Part I: Crafting a Social Media Strategy

A social media strategy is necessary to make sure that the use of various platforms is in alignment with your organization's mission. A social media strategy provides guidance to government employees responsible for social media accounts and helps mitigate the risks posed by using highly interactive third-party platforms. You can use the following questions as a template for designing organizational guidelines.

Organizational mission and communication strategy

- What are your overall organizational objectives and goals?
- How do your social media activities support your agency's mission?

Appropriate content and online products

- What content are you going to create or curate to cultivate and draw people to your site?
- What is the origin of that content?
- What are your content review requirements?

Roles and responsibilities

- Who within your organization will be responsible for content creation? Specifically, who will fulfill the following roles:
  - *Social media ringmaster.* Strategist and visionary responsible for design, content oversight, campaign planning, analysis and interpretation of social media analytics
  - *Content creators, curators, account administrators.* Staff responsible for daily routines with posting rights
  - *Content providers.* In this case, the entire organization should participate. It is recommended that responsibilities be distributed throughout the organization.

Suggestion: Knowledge experts can be found across the whole organization. The provision of content should not be limited to only those individuals in IT offices or public affairs offices.

Audience

- Who is going to be your target audience?
- What characteristics are you considering when identifying segments of your core audience?
- What networks should you target in order to gain access to your core audience?
- Who do you expect to join your network?
- Identify your organization's audiences and build the organization's audience on social media channels.

Suggestion: Establish a social media presence that is useful and not too intrusive for your followers. In addition, you should be responsive to your followers, provide them opportunities for input, and encourage content sharing. You should also incorporate social media into your traditional outlets.

Access

- What alternatives for access to and representation of information are available?

Online netiquette and comment policy

- What is acceptable online conduct, or netiquette?

Tools/platforms/social networking services

- What are the allowable and accepted social media channels for your organization?
- Do you allow your subunits to select the tools themselves?
- Do you provide guidance for the most appropriate tools that allow you to support the mission of your organization?

Suggestion: Note that the selection of a specific tool should be made as one of the last decisions in the strategy design process. It is more important to think about your mission, audience, or appropriate online content before you decide which tools or combinations of social media channels you allow.

Setting up accounts

- Who is allowed to set up social media accounts?

Suggestion: Agencies should select one of the following two options for setting up accounts:

- **Option One: Centralized decision-making.** The social media ringmaster sets up accounts for decentralized subunits.

- **Option Two: Decentralized decision-making.** The central social media strategy only provides the context and every subunit must then decide where and how many accounts are opened.

Daily routines, social media tactics and campaigns (See Part II on social media tactics)

- When do you post where?
- What schedule should you use?
- How do you engage with your audience?

Suggestion: Define your expectations for online conversations with your audience(s). Any online communication should adhere to the same etiquette as face-to-face conversations. Agencies should accept and respond positively to differing points of view. Agencies should always respect their audience.

Metrics

- How will you measure whether your mission has been accomplished?
- What are appropriate quantitative and qualitative indicators of your social media success?

Suggestion: Your agency should measure impact, engage top management in the interpretation of the data, and be ready to adjust your tactics.

Training

- How will you get non-users among your employees on board?
- How will you train digital natives, who grew up with social media, to understand government requirements, laws, and existing regulations in the responsible use of social media?

Suggestion: Training should be thought about as part of the overall social media strategy. One of the elements of training is to inform agency employees to use disclaimers on their personal and public social media accounts highlighting that they are not representing their employer's opinion.

Part II: From Strategy to Action—Social Media Tactics

After the social media strategy is designed, it is necessary to think about daily social media tactics—how your new online practices can support your organizational mission. Some of these activities will become *routine,* requiring agencies to conduct them on a daily basis. Agencies will also engage in *ad hoc responses* to emerging issues, while pursuing *planned campaigns.*

Tactic 1: Pushing Content

Provide facts, press releases, and web content on social media channels to inform and educate the public. This tactic should be one of your routines to distribute and broadcast web content via social media channels. It will help to reach parts of your audience who may never visit your official government website.

Tactic 2: Pulling Content

In addition to providing official government content, citizens and other stakeholders can be encouraged to actively provide their insights, feedback, and even their own online products, such as videos, pictures, comments to blog posts, etc.

Popular pull mechanisms include the use of specific Twitter hashtags, such as the State Department's #AskState hashtag, or caption and picture contests where agencies ask their followers to send in their own pictures, which are then featured on a government blog.

Tactic 3: Networking/Mingling

Not all social media activity has to be fast and furious and a constant back and forth between the account holders and the public. Instead, social media interactions among the groups you consider to be your main audiences can help you understand how the public views issues that your agency is involved in.

Passive listening, fact-checking, and responsiveness are helpful tactics to establish your agency as part of a larger network. Understanding where issues are discussed and what the current "temperature" of the public mood is constitute an important social media tactic.

Tactic 4: Customer Service and Citizen Relationship Management

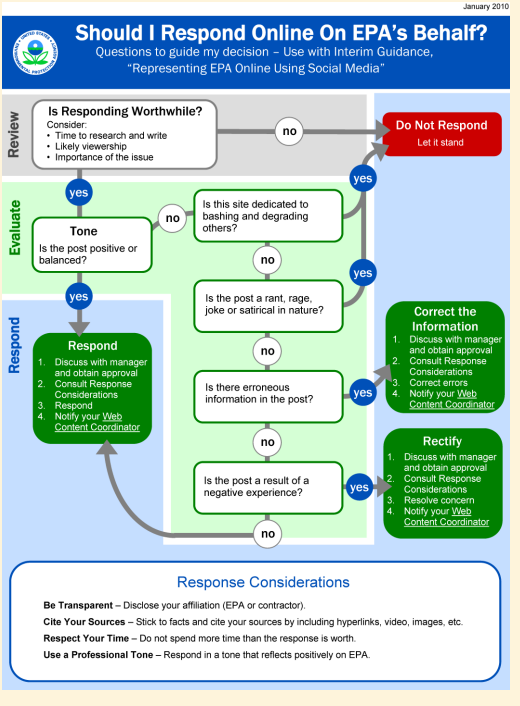
One of the most difficult-to-achieve tactics is to provide individualized customer service. Answering questions and responding to requests from individual citizens oftentimes requires in-depth case knowledge and human capacity.

Developing a Social Media Comment Policy

Agencies should set up a comment policy that supports the organization's overall social media strategy.

The following graphic shows the commenting policy developed by the Environmental Protection Agency (EPA). It is distributed to social media account holders and employees responsible to administer social media accounts.

Before a government employee responds to a comment on a blog or a social networking site, EPA asks: "Should I respond online on EPA's behalf?" A simple flowchart guides through the process:



EPA's Commenting Policy (available online: http://govsocmed.pbworks.com/f/should_i_respond_online.pdf)

Part III: Government-Wide Resources

Use Go.USA.gov URL Shortener

Suggestion: It has become a common practice to use links to point your audience to your own government website, to a specific blog post, or to a wiki entry.

Background: Links, however, are usually very long and difficult to remember. Go.USA.gov is a URL shortener service that provides short versions of longer links that can be easily distributed as status updates on social networking sites.

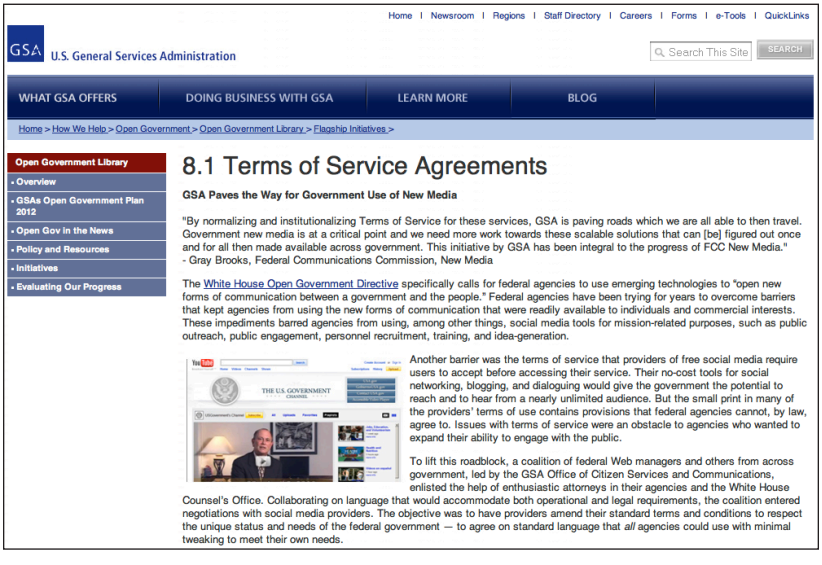
https://go.usa.gov/

Terms of Service Agreements

Suggestion: Before you get started, find out whether your agency has negotiated government-appropriate federal-compatible Terms of Service Agreements with social media providers.

Background: The General Services Administration (GSA) has negotiated Terms of Service (TOS) Agreements with many different social media providers to make sure that the use by federal agencies is safe and complies with the existing laws and regulations.

GSA suggests working with your agency's *Point of Contact* and lawyers to make sure that the existing TOS are compatible and appropriate for your own agency. GSA provides model agreements that can serve as templates for your own negotiations. Read more about the federal-compatible Terms of Service Agreements: http://www.howto.gov/web-content/resources/tools/terms-of-service-agreements.



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8.1 Terms of Service Agreements

GSA Paves the Way for Government Use of New Media

"By normalizing and institutionalizing Terms of Service for these services, GSA is paving roads which we are all able to then travel. Government new media is at a critical point and we need more work towards these scalable solutions that can [be] figured out once and for all then made available across government. This initiative by GSA has been integral to the progress of FCC New Media."
- Gray Brooks, Federal Communications Commission, New Media

The White House Open Government Directive specifically calls for federal agencies to use emerging technologies to "open new forms of communication between a government and the people." Federal agencies have been trying for years to overcome barriers that kept agencies from using the new forms of communication that were readily available to individuals and commercial interests. These impediments barred agencies from using, among other things, social media tools for mission-related purposes, such as public outreach, public engagement, personnel recruitment, training, and idea-generation.

Another barrier was the terms of service that providers of free social media require users to accept before accessing their service. Their no-cost tools for social networking, blogging, and dialoguing would give the government the potential to reach and to hear from a nearly unlimited audience. But the small print in many of the providers' terms of use contains provisions that federal agencies cannot, by law, agree to. Issues with terms of service were an obstacle to agencies who wanted to expand their ability to engage with the public.

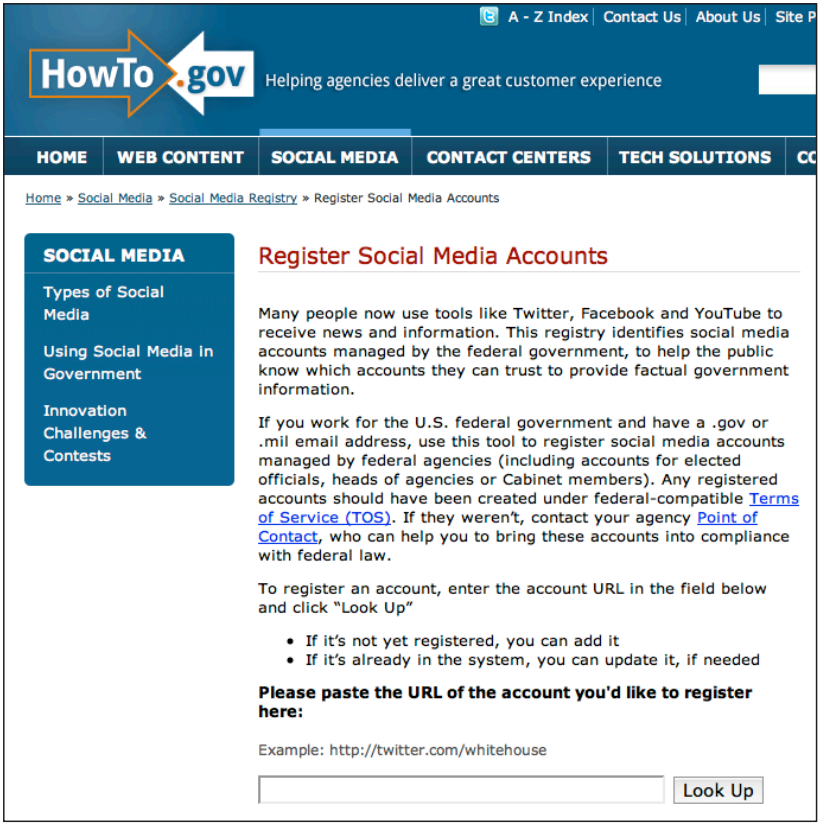
To lift this roadblock, a coalition of federal Web managers and others from across government, led by the GSA Office of Citizen Services and Communications, enlisted the help of enthusiastic attorneys in their agencies and the White House Counsel's Office. Collaborating on language that would accommodate both operational and legal requirements, the coalition entered negotiations with social media providers. The objective was to have providers amend their standard terms and conditions to respect the unique status and needs of the federal government — to agree on standard language that *all* agencies could use with minimal tweaking to meet their own needs.

Social Media Registry

Suggestion: Agencies should register their official government social media accounts using GSA's *Social Media Registry*.

Background: The Social Media Registry tool includes several thousand existing government social media accounts and new accounts can be submitted for verification purposes. Whenever your agency wishes to follow another government social media account or wants to share updates from other accounts, you can verify here if you are indeed following a registered account and are not endorsing fake accounts.

http://www.howto.gov/social-media/social-media-registry/register-accounts



HowTo.gov

Suggestion: Agencies should use the resources of GSA to train their employees on the use of social media to accomplish agency missions.

Background: GSA has created an online resource center called HowTo.gov that provides an overview of the existing rules, regulations, and all legal sources for web content development. An important component is the *Digital Government University* that provides live webinars and recordings of past webinars to showcase best practices of social media use in government.

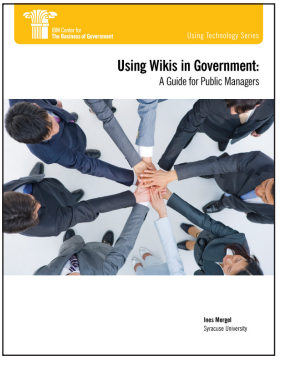
http://www.HowTo.gov

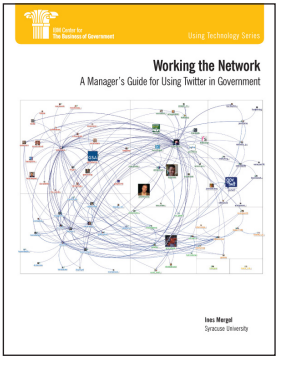
Resources

Ines Mergel Blog

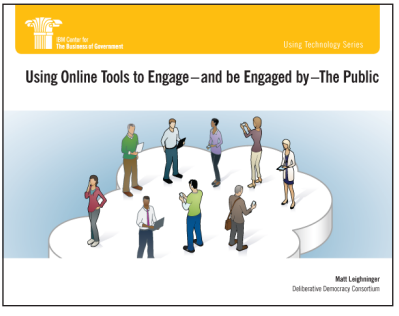
Existing and publicly available social media strategies of several agencies and departments of the U.S. federal government are available on Ines Mergel's Socal Media blog: http://inesmergel.wordpress.com/social-media-policies/

Previous IBM reports by Ines Mergel on social media in the public sector

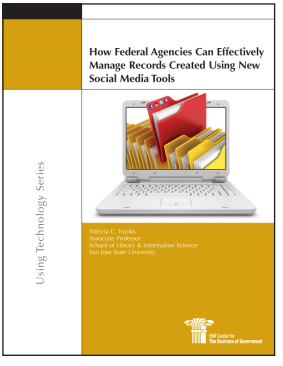




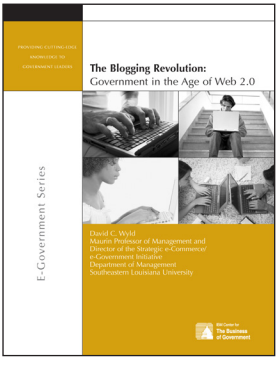
Other IBM reports on social media



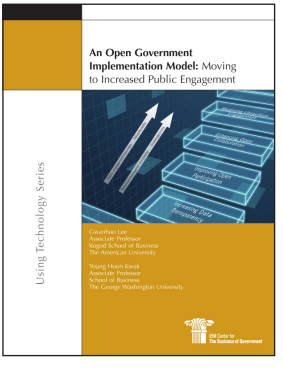
Using Online Tools to Engage—and be Engaged by—The Public by Matt Leighninger



How Federal Agencies Can Effectively Manage Records Created Using New Social Media Tools by Patricia C. Franks



The Blogging Revolution: Government in the Age of Web 2.0 by David C. Wyld



An Open Government Implementation Model: Moving to Increased Public Engagement by Gwanhoo Lee and Young Hoon Kwak

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