

for the social thinker.

Best practices for social media strategists,
administrators and geniuses at Case Western Reserve
University.

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Socialize strategically.

Ready to debut your new social media initiative? Then you better have a plan. Nothing torpedoes social media endeavors like winging it. So, let's talk strategy.

In the grand scheme of things.

Sure, plenty of lo-fi campaigns have boomed in the social sphere, but few launched without goals and strategy. Luck and timing only go so far.

Before you build your ultimate social media plan, however, don't.

Social media strategy shouldn't stand on its own; it should be part of your department's or program's overall integrated marketing and communications plan. Consider social media a vehicle, not the destination.

When developing the social media prong of your overall plan, start by identifying your communication goals and objectives; as well as audience needs and interests.

Ask yourself:

- How can social media help us meet (and exceed) our goals?
- Is social media the appropriate channel for reaching our audience(s)?
- Who are our audiences and do they use social media? How do they use it?
- Which platforms or tools will be most effective? Why?
- Do we have the resources for content-development, execution and maintenance?

Warm up your strategic muscles.

Does your social media initiative make the cut? As you start to develop your strategy, keep in mind the above evaluation and do the following:

- **Open your ears:** Seek out and monitor conversations about your department, program or subject area already happening in the social sphere. What are people saying? How can your presence add value to their experience? Are there opportunities to engage people beyond your current outreach efforts?
- **Follow, then pass, the leader:** Identify who's doing social media best in your subject area. Follow them, make notes and learn how they take engagement to new heights. Take what you've gleaned and ask yourself, co-

workers, friends, strangers and students how to do it better. Don't copy someone else's strategy. Don't reinvent the wheel. Set a new high bar for everyone else to reach.

- **Reach out and high-five someone:** Put yourself in the 'fan' seat for a minute and think about how you've been engaged beyond the norm. Who has blown your mind? What campaigns, exclusive content, advice, videos, conversations, questions, offers or prizes have made you stop and look? Develop unique and creative ways to reach out and grab audience attention. Favor the effective and intriguing over the expensive and gimmicky. Your goal is to reach out and have your audience high-five you right back.
- **Convert the evangelists:** If you have only one goal for your social media strategy, let it be this: get people excited about your message. Whatever it is. People love getting excited about things. They will love you for it. They'll want to talk about you, tell their friends about you, get a tattoo of you. They'll want other people to love you as much as they do. And they will.

Let your fans do the talking and the walking for you—from audience building to information sharing. Just give them a reason to be super-psyched.

- **Bust out the measuring stick:** Metrics can sometimes get lost in the 'virtual' world. Success, however, is as real as it gets. If you're not sure what to measure, start with some concrete stats (i.e., target number of fans or followers, percentage of participation, sharing, click-through rates, etc.). Just remember that metrics are about more than large numbers. Getting a smaller group of people to attend a real-world event via social marketing, for instance, may be more important than having 1,000 fans. Refer back to your overall integrated plan and consider how your social media options can help meet your comprehensive goals.

Execute your plan and develop more telling or in-depth measures as you learn your way. You'll want to return regularly and update your metrics to ensure you're on the path to social success.

Best practices make perfect.

More and more social media is our first (and closest) contact with our audiences. It's free. It's informal. No one's wearing shirts and ties in the social sphere. But like any other place on the planet, first impressions are paramount. When you develop your social media presence, you need to be ready to 'meet' any of the planet's one billion social media users at any given time, and you have about 15 seconds to make them like what you have going on.

Comb your hair. Check your teeth. And take note of some best practices to make your best first impression in the social sphere.

1. Nothing but the truth.

Be accurate.

Sometimes the speed of social communications can get important details in a tangle. You want to be first to share news, but don't let urgency get in the way of accuracy. Get the facts straight before posting them to any media.

Think twice (or thrice) before posting.

While vehicles like Twitter and Facebook allow users to delete posts and comments, their archival systems can save that information, even if you've removed it. Search engines can turn up a removed post years later. Comments can be cached, copied or forwarded. So, consider everything you post a permanent statement.

Check your facts, grammar, spelling and punctuation before pressing that 'submit' button, and read your post back to yourself to ensure the language conveys the intended meaning.

Correct your mistakes.

No one is perfect. If you make a mistake, fess up. Correct any inaccuracies or errors in a quick, upfront manner. Make it clear—whether in follow-up posts, comments or replacements—that you're aware of the error and have made the appropriate corrections.

While it's important to be accurate, it's essential to be honest. That honesty and diligence will help you become a trusted voice in the social community.

2. Transparency is the best policy.

Step out from the curtain.

Anonymity in social media can sometimes lend a sense of mystery and intrigue to a page or personality. In higher education, however, we're focused on delivering information and engaging our audiences—not leaving them in the dark.

Be honest and upfront about who's running the social media show. You don't need to state your name and title every time you post a link or update status. But if a community member wants to know who's behind the page, tell your name and affiliation. It's OK to let your community members know they're interacting with a human being, not a nebulous departmental entity.

Be reachable.

In general, your page or profile should provide an email address or contact details for your designated social media administrator. Have a team managing the account(s)? Post at least one email address or create an alias that forwards messages to the team.

Your audience will appreciate your open invitation to get in touch (and be in touch). It's that type of connectedness and openness that generates a sense of community.

No hidden agendas.

You're not just a university employee. You're a chief brand steward. Word of mouth goes further than almost any other marketing vehicle. Especially when it comes from the heart.

Some institutions don't condone sharing university news via personal accounts. But we don't agree with that approach. If there's a story or program at the university you honestly believe in, share the news! Is there a debate in the comments section of a university-related story? Join the conversation. Just be a responsible brand steward.

When personally posting about or responding to university-related content, be upfront about your identity. Disclose your name and affiliation. Clearly state your role and your goals in posting the news. Your openness will lend authenticity to your posting and let other users know that you're sharing out of pride, not obligation. You wouldn't want to be accused of having ulterior motives.

Mind your self-representation.

If you're posting personal comments, please disclose your name and affiliation, and state that you're voicing a personal opinion, not representing the opinion of Case Western Reserve University, its administration or any other community members.

Please remember to use good taste, common sense and a professional tone whenever participating in an online discussion regarding the university. While constructive criticism adds to a healthy dialog, please refrain from engaging in online dialog that disparages colleagues, competing institutions or critics.

Should you choose to associate your personal social-media account with official Case Western Reserve University vehicles, your profile, tone and content should be consistent with the way you wish to present yourself to colleagues, administration and other members of the university community.

3. Protect people's rights.

Keep things confidential.

Wondering whether something is confidential, proprietary or too private to share? Don't post it.

Never post confidential, proprietary or private information about Case Western Reserve University, its administration, students, employees, alumni or donors on any social media.

Please use your best ethical judgment and remember to follow university policies regarding confidential and proprietary information, as well as applicable federal requirements (i.e., FERPA, HIPA) and NCAA regulations. And if you're in doubt, leave it out.

Beware copyright.

When using photographs or graphics, repurposing content or sharing information, please be mindful of copyright and fair use laws. For more information, visit the U.S. Copyright Office at copyright.gov.

Respect your audience.

Before you begin any social media endeavor, you should identify your target audiences and understand their needs. Use what you know (and what you learn) to

determine what content and tone are effective and appropriate for your community. Remember to adjust and improve as you receive feedback and observe trends.

Social vehicles provide access to audience eyes and attention like no other media. Be respectful of those few precious seconds and use them wisely. Offer content that delivers added value to your community members and sparks conversations. Don't spam them with content that's too self-serving and promotional. When considering what to post, ask yourself: would I share this information with my friends? If not, seek out something more compelling.

Case Western Reserve University is committed to demonstrating respect for diversity of thought, ideas and opinions. It's your job as social media administrator to carry out that commitment in the social sphere. Allow—encourage, even!—open discourse about relevant topics. Users should be free to openly discuss all matter of subjects and disagree with one another.

We do not censor.

Acceptable content may be positive or negative within the context of the conversation, whether it is favorable or unfavorable to the university (only content that is factually incorrect needs to be addressed). Speech that is obscene, threatening, abusive or illegal in any manner, however, is unacceptable and must be immediately removed. As administrator, it is your responsibility to identify the offending user and report the user to the social media platform administrators. You may choose to take a screen capture (on PC: Shift or Function + PrtScn; on Mac: Cmd + Shift + 3) of the offending materials for future reference.

Respond (even to 'that' guy or gal).

It's only a matter of time before somebody gets belligerent, inappropriate and mean. There's a fine line between healthy debate and explosive reaction. And sensitive issues can sometimes touch off a reaction that offends and disrespects others' rights to differing opinions. Handle these situations with care.

You don't need to step in at every critical statement or barb. But keep a close eye.

Sometimes you'll have to be the moderator—a few quick reminders to be civil might do the trick. Some people, however, only want to incite hatred and anger. And an inflammatory discussion is just like any other wildfire—it starts in a flash and it's hard to put out. It's up to you to determine the appropriate response. Avoid being

confrontational; avoid being a censor. Just remember to protect the rights of your users and maintain the tone and intent of your social media strategy.

Words to the wise.

So, you're ready to drop the wallflower act and get social. Check out these final tips and best practices before you hit the dance floor:

Be a user.

The best way to harness the power of social media is to join the revolution. If you don't experience the tools as a regular fan or user, you'll never maximize your ability to use those tools as a communicator or marketer. There's great value in living in the social sphere and creating innovative approaches to engagement based on what you've seen and loved.

It's a conversation.

Don't be fooled by screen names and profile pictures. Your fans are real people. Talk to them like they're in the room. Nix the fancy language. Instead, focus on showing your personality, developing a rapport and encouraging discussion. Pretend you're the host and social media is your party.

Give generously.

Your fans made the effort to find you. Reward them. Social media fans deserve an experience they can't find anywhere else. Make them feel special with exclusive content, advice, thought-provoking questions and games. Allow them first access to announcements or events. Give them reasons to love your message. They might get generous right back.

Quality is queen (or king).

Remember that giving generously does not mean delivering junk. Put yourself in the 'fan' seat and evaluate content you're posting. Does it add value to the experience? Is it just fluff? Would you want to read it? Anything short of awesome is spam. Your fans will recognize it and leave.

More than words.

Voice is personality in social media. What you say (and how you say it) is what you are. So, be awesome. Or witty. Nerdy or whimsical. Determine your department or program's personality, and then develop and maintain a voice that matches the appropriate tone and taste.

Don't be a deadbeat.

It's easy as pie to create a social media account. It's not easy to keep it going. Before you launch a social media initiative, make sure you have the resources for content-development, plan execution and maintenance. Don't drum up business only to let people down. It will be very difficult to bring them back. And while you're at it: don't abandon your regular website or other communications in favor of social media either. Again: social media should be part of a comprehensive plan, not the plan itself.

Have fun.

You have to know how to have a good time to create one for others.

In the event of an emergency.

Recent incidents on college campuses have shown that social media plays a pivotal role in delivering messages during an emergency, as well as collecting information from victims and for first-responders.

Social media pages are among the first places community members go for details about what has happened, what is being done and how they should respond in the event of an emergency. Parents use Facebook to get up-to-the-minute details, ask questions and learn how they can connect with their children. Victims turn to Twitter to report their locations to rescue workers. The media follow social communications to report on the situation and gauge the university's response.

It's essential that all Case Western Reserve University-related social media accounts communicate uniform messaging during a crisis.

Emergency response permissions protocol

Many community members, parents, victims, media workers and other users already follow recognized Case Western Reserve social media accounts. At the time of an emergency, however, followers' numbers will explode. Individuals not already following these pages will seek them, most likely using site-searches on Facebook and Twitter for accounts containing terms like 'Case Western Reserve University,' 'Case Western Reserve,' 'Case Western,' 'Case' and 'CWRU.'

Therefore, it is required that if you open or run a social media account that bears any named relationship to the university (i.e., contains the name 'Case Western Reserve University,' 'Case,' 'CWRU' or the like), it must be accessible by the university's emergency response team.

Social media outlets, including Facebook and Twitter, require account administrators be 'authorized representatives' for the pages they maintain. Only administrators who have agreed to the emergency-response permissions protocol are 'authorized representatives' for Case Western Reserve University pages. Failure to comply with this policy may result in closure of the social media page or account.

How will social media accounts be used?

Upon declaration of a campus crisis, the emergency response team will take responsibility for all university-related social media accounts. All pages and

accounts will be updated to display an 'emergency response' graphic, as well as ongoing instructions.

Accounts will be continuously monitored for incoming messages, tags, questions and other communications. All posts will be documented and processed according to emergency communications procedures. Some crisis-time posts may also be used to plot and calculate trends, help first-responders locate victims or aid in police investigations. Immediate access to this data is imperative to optimal execution of emergency response strategy.

It is your responsibility to protect yourself during a crisis and follow the instructions provided by Case Western Reserve University's emergency managers. Maintaining social media communications in accordance with official emergency response procedures may put your ability to protect your own safety in jeopardy.

Note that access to your social media account will only be used in an actual campus emergency, and accessed once each year for emergency simulations. It will not be used to edit, modify, censor or monitor your social media activities.

Please see the university's official crisis communications plans for more details.

Become an authorized social media representative.

Both the social media account administrator and University Marketing and Communications will sign off on an agreement to the above terms.

Contact Gina Prodan at glp12@case.edu or 216-368-3447 to discuss how comply with these access rights.