

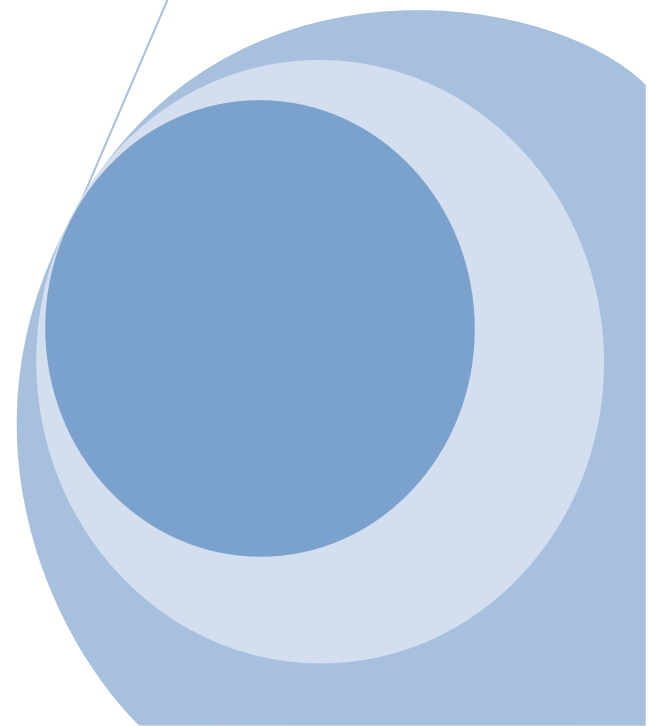


The 90 Day Social Web Brand Management Plan

Managing Your Social Web Intentions

Following the Social Web Intentions seminar, this plan should be a field guide for building in a process to manage your Social Web Intentions

Robert Rose & Michael Weiss
8/1/2010



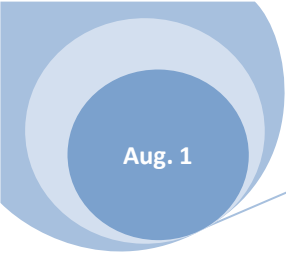


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Introduction

Thank you for reading Managing Content Marketing. This guide is meant to serve as a supplemental piece to our chapter on conversations and setting up style guides. This document – created by CMI Consultants Robert Rose and Michael Weiss is a popular one that was developed last year and provides a basis for setting up these guides.

As was said in the book – the important thing is not which policies or procedures you put in place. The most important thing is that you *decide* to put in a process. This is really setting your intentions for the whole organization – so that your entire team is on the same page about what your organization will be on the Social Web. This is the age of open organizations – but this is all a matter of degree. You need to set the intention of how open your organization will be.

So, what's next

It's time to set the intentions for building a structure and process that will support those intentions. This is almost assuredly something new for you. While what you're doing is simply defining how the company will behave in social situations, these are processes and relationships that most likely haven't existed before. In other words, *you* know how to throw a party for yourself. But now you're being asked to throw a party where you share hosting responsibilities with 50, or 100 of your colleagues. You want to make sure everyone has a good time, and that nobody is rude to the guests.

Making the time and effort to get this right is important.

Before you start – ask yourself some important questions

How open will you be?

Will you need strict policies and rules governing how people will behave and interact on social media. Or, will you rather not have ANY rules. Or, will you not have any set rules – but instead set up a training program to communicate the core values of the organization to employees.

Setting Your Intentions

Hopefully the attached plan and questionnaire will help you to set your intentions. The questionnaire isn't meant to be a "rule book" but rather just food for thought that helps you to develop your own Social Media Intentions. Remember, the key here is accountability. The tighter your restrictions, the more there will be a perception for greater accountability. But that doesn't mean that loose intentions don't engender ANY accountability. You need to decide what happens if people don't follow the intentions.

Creating Your 90 Day Social Web Plan

The 90 Day Plan that follows is more comprehensive than just setting your intentions – it's meant to help you set the strategy and plan for the entire process. Setting your intentions is at the center of this plan, but it's obviously more than just setting intentions.

A Deloitte study conducted in 2009 found that 58% of executives agree that reputational risk and social networking should be a board level issue. But only 15% say that it actually is. Further, that same study found that only 17% have a formalized program dedicated to monitoring and mitigating risks related to social networks and marketing. **1 (Deloitte Social Networking And Reputational Risk In The Workplace).**

So, the following plan is meant to help you build a program that will empower you to realize the benefits of the Social Web while mitigating the real risks.

We hope it's of value to you.

Robert Rose & Michael Weiss

The 90 Day Social Media Brand Management Plan

1. **The Pre Or Post Work (okay so it's not really 90 Days)** (Days 1-30 or Days 91-120)

a. **The Business Case for Social Web (Presentation/Document)**

We can't build it for you – (well we can but that's what we get paid for right?) but basically you'll probably need a presentation or a document that will demonstrate the business case for a social Web marketing strategy. Depending on your situation – this may actually come after your 90 Days of planning. Especially if you need costs, and legal considerations prior to approval. You'll also notice how the Action items below map to the steps beyond. You can either let the plan build the steps or the steps build the plan.

Here's what you'll want to cover in that presentation/document:

i. **Action Items – These Are The Sections Of The Document**

1. **Background** – easy to find. This is what your competitors are already doing, and the importance of social Web
2. **Stats and figures** to make the argument compelling. You've already taken the first step with this presentation.
3. **Key Goals for this program.** What is the overall business goal (not the metrics). In other words – is it to drive constituents? Revenue? Engagement? CRM cost decreases? What do you hope to achieve that will move the needle? Not specifics yet.
4. **Setting Your Intentions** – Here's where you set your social intentions. See how this is at the center of the plan. How will this strategy affect our current processes? What do we need to solve from a legal standpoint. What do we need to consider as part of a legal concern?
5. **Buy-In Or Sponsorship** at the executive or board level?
6. **Budget** – Costs both internal and external (may come after plan is complete)
7. **Expected Forecasted Return** – even if you don't know this – it's something you should quantify (e.g. a 10% reduction in constituent calls (that's a real cost-savings) or 20% more donations, or volunteer recruitment savings, or more awareness.

ii. **Deliverables**

10 Page Document of the plan itself (or the request to move forward)

2. Step Two – Seek First To Understand Then Be Understood (Days 1-15)

a. Listening & Lurking

A plan well begun is half done – and this is, by far, the most important step. Utilize monitoring tools to understand where the conversations about your brand (if any) are happening.

These are examples:

Action Items

Lurk: this is the equivalent of “scoping out” the party. Use TweetDeck – and do a monitored search on your brand name or keywords. Use Google Search – subscribe to your name and keywords. Check out Radian 6 for blog monitoring and social Web monitoring. Look at Ice Rocket for Blog searching. Check out Facebook and search for your name. Go to bulletin boards, and blogs, and see what the general feeling is on your topic of concern. Maybe add a few comments to a blog and test the water. Mostly just identify.

What channels do your constituents use: As you monitor – develop “personas” for who you are targeting. What is their name? Who are they? What social networks do they use? What do they think about your brand? Round out these personas into who will populate your “community”. How do they fit into your goals, and your constituent acquisition/retention strategy.

Remember – It’s not about you: Are you currently connecting with these people? Or, is this new for you? Can you map the channels that your constituents use to social Web channels? The answer isn’t always yes. Then, can you map these constituents around a concept (a conversation) which members will coalesce. In other words – the conversation is not about “you” or your organization. It’s about what members can do with “you”. It’s not about savinganimals.org – it’s how saving animals changes the world.

b. Deliverable

Document the listening process. It enables you to have a core deliverable of who your constituents are, where they are gathering (where the conversations are happening) and what the “single word” concept of your social Web will be.

3. **Step Three - Planning & Measurement: What Success Looks Like** (Days 15-60)

a. **Developing goals and analytics**

Now we know who we want to converse with, and what we want to talk about. With goals, we must have a plan and method of measurement if we are going to manage to it. So, this is where we develop our metrics that support our goals.

Important Note: *This is separate from whether the success of those metrics advances the business goals we set out in our business plan.* For example, our goal may be to ultimately drive 20% more sales this year with Social Web. However, our initial goal for two quarters might be to only garner 10,000 new Fans on Facebook.

Recognize that this is a fluid process – and one where we may not be able to draw an immediate direct correlation.

b. **Action Items:**

Develop goals and method of measurement – ultimately our goal is that we generate more value than we are expending cost – but let's get specific here. What are our goals – more donations? More engagement? More awareness of mission? How will you measure? Here's a sample:

- i. More organic traffic/awareness – look at web traffic referrals, search volume, or how many followers or “fans” that you have. Or, Retweets. The numbers are meaningless – it's the trend that's important.
- ii. Driving engagement - then look at followers and content that drive engagement vs. those that don't. Ratios, or engagement on social Web sites, or (if you're a nonprofit) volunteers from social Web activities, or percentage of social Web donations funnel.
- iii. Driving customer loyalty or driving them down the CRM funnel toward evangelism then look at - time on site, or how many become physically engaged from just virtual, or recommendations, or commitments for recruiting, or even a “net promoter” score.

c. **Deliverable**

Write down this plan, this workflow and these policies. Map out the processes for managing the content and the conversation.

4. **Step Four - Setting Social Web Intentions (The Center of Our Plan)** *(Days 15-60) – Concurrent with the Above*

a. **Setting governance and/or policy**

Now we know who we want to converse with, and what we want to talk about. Now we must develop our intentions and process and roles that will assume this responsibility. This is where the learning from the seminar will help. Explore your own Brand Jam. Explore all of the conversations that could arise in your sphere of influence and how your organization will react. Who will assume responsibility in our organization for taking that on? This is the step in the process where you should involve somebody from Legal to make sure that everything is in alignment. Develop your intentions as a Social Web Charter and Content Guidelines and make sure everyone (including upper level executives) understands and signs this as a responsibility of conversing.

b. **Action items**

Governance/Social Web Policy – Review the Questionnaire at the end of this plan. Review and create social Web guidelines and policies.

Develop the internal process Social Web marketing is people - plain and simple. Who and how many will be the voice of your organization? What is the social Web policy for your organization? Will content need to be approved before going out? Who will converse with your constituents? Develop a communications process and workflow for your internal organization. Identify the roles in the organization. Who will manage the community? Create the content? Respond to blog postings? What will the workflow look like? Who will enforce? What is the disaster plan if something really bad happens.

c. **Deliverable**

Create a charter and live by it. What is the philosophy and what is the tone of your conversation. What are the legal ramifications. If need be (especially in large organizations) make everyone who will participate in social Web on behalf of the organization go through a class.

Develop a content workflow (no matter how simple or complex). Write down this plan, this workflow and these policies. Map out the processes for managing the content and the conversation.

5. **Step Five - Tools – Now Let’s Think About Tools** (Days 61 – 75)

a. **Where we’ll have our conversations**

That’s right – we’re almost two months into our Social Web Marketing planning before we’ve thought about what tools we are going to use. But now that we know who our personas are, where they congregate, the topic we will drive (at least initially) and we have our internal processes defined – now is the time to pick the tools (just a few examples).

- i. Blogs – for a publishing platform to build extended content and feedback
- ii. Facebook – for a “fan” based topic around events, and where people naturally congregate online
- iii. Twitter – for micro-blogging and generating a following that you can guide to other properties for extended content
- iv. Syndicated Content – Digg, Slashdot, Buzz (others) for submission of content on your Web site.
- v. Site Community (or Ning) for your own managed community to drive a specific topic with a closed community
- vi. Delicious.com for sharing links and generating a portal of content directing to other sites

b. **Action Items**

Decide on which tools you’ll initially use and map back into the content workflow process. You shouldn’t have to acquire the social networks because you’ve already registered your name in step one right? So, now it’s just a mapping exercise. How will a press release go from start to finish in this new workflow. How will any piece of news. Who/How will Twitter @Replies be responded to. What is the policy on Company Twitter accounts and personal information.

Then, Map the relevant analytics back to measurement and goals. For Each tool – map it’s relevant metrics back into what you will measure. For example, if it’s Facebook it’s Followers, Page Views and Engagement for Twitter (for now) it’s Followers and referrals to other Web sites.

Then, customize those tools to make them match your brand and identity. Take the time to add your branding elements to each of the Social Networks, or to your Blog. As much as possible it should feel like your brand.

c. **Deliverables**

Your tools should be ready to go – and ready for customization.

6. Step 6 – Measure Twice Cut Once

(Days 75 - 85)

a. Take a Breath And Review

You now have a plan – review that plan and make sure everyone understands their roles and responsibilities. Do mock runs. Work through the same exercises that we went through in the Seminar. Do your own version of the Brand Jam and The Fishbowl.

What happens if disaster strikes – have a disaster plan. Who will continue to listen and monitor. Review this again.

b. Action Items

Plan Review: Schedule some time with your team to make sure everyone understands what going on.

Mock Disaster Drills: Saturday night, a group of trolls come in and paste hate speech on your Facebook page. Or, worse, a group of people that disagree with you post highly disagreeable content (but not quite objectionable) to your Community. What happens – what do you do.

Mock Process: Test the system. Post some real content. How's it working?

Then, Map the relevant analytics back to measurement and goals. For Each tool – map it's relevant metrics back into what you will measure. For example, if it's Facebook it's Followers, Page Views and Engagement for Twitter (for now) it's Followers and referrals to other Web sites.

c. Deliverables

Your final plan and a giant pitcher of beer. You're almost there.

7. **Step Seven – Launch** (Day 90)

Now, you have your plan, and you're comfortable with your content workflow – it's time to launch. Make a big deal out of it. It's time to celebrate the launch. Get people to invite their friends, use social networking to launch your social network.

Monitor Closely – your first couple of weeks monitor it very closely. Find out the bugs in your workflow (there will be some) iterate. Iterate. Optimize and iterate.

Measure – start measuring. What's working what's not. Optimize. Converse.

It's just begun. Now the work comes. Conversing takes work. It's now your job to keep the conversation going. Review your processes – check in with people. How's it going? Know that there will be lulls – and that's okay. Just make sure to keep a constant pressure on it and keep monitoring it. It will pay off. We promise.

Deliverables

A Well-earned celebration dinner for you and your team. Congratulations.

8. Resources For You

Understand that the landscape is changing quickly and new tools are launching all the time. Here are some of the resources that you may need in getting started:

Registration Tools

User Name Check <http://usernamecheck.com/>

Name Check: <http://namechk.com/>

Monitoring Tools:

Note: Some of these are free, and some are “freemium” and some are commercial services.

Twazzup <http://beta.twazzup.com/>

Trackur <http://www.trackur.com/>

SocialMention <http://socialmention.com/>

Addictomatic <http://addictomatic.com/topic/>

TweetDeck <http://www.tweetdeck.com/>

Seesmic and Seesmic Look http://seesmic.com/seesmic_desktop/

Hootsuite <http://hootsuite.com/>

Twitter Analyzer <http://www.twitteranalyzer.com/>

XINU Returns <http://xinureturns.com/>

Tweet Stats <http://tweetstats.com/>

Twitalyzer <http://www.twitalyzer.com/>

Blog Pulse <http://blogpulse.com/>

Post Rank <http://www.postrank.com/>

Board Tracker <http://www.boardtracker.com/>

Social Web Intention Questionnaire

Introduction:

What kind of Social Web Intentions are you setting? What will be your philosophy? These are the questions you should answer prior to working through your governance policies. Will you operate in an organic “free” environment. Or, will you require a strict “command and control” process for individuals.

Much of this will depend on your industry of course – and legal ramifications. But some of it may be a branding or marketing decision. The key is to which decision you make – but rather to make one.

The following questionnaire is meant to help shape your Social Media Intentions – not dictate it. It will be misused if you copy and paste this questionnaire into your employee handbook and expect everyone to read it.

Use this to expand your thinking into the kinds of issues you might have to address when setting your Social Web Intentions. In short, the guide should be looked at as a “freedom to” rather than a “freedom from”. Our goal is that the answers to these questions will become ways to “free” the social Web team from anxiety and doubt when it comes to the questions of “how” Social Web content and conversations are governed by the organization.

These questions are grouped into the following sections:

- **Online Communications Guidelines** – covering some of the areas separate to Social Web and their ties to the online conversation
- **Social Web Structure** – how the process is structured and plans and guidelines for intellectual property creation
- **Social Web Content Workflow** – how the organization wants to guide the conversation
- **Individual Responsibilities and Behaviors** – how and where is the individual responsible for his/her actions on the Social Web.

I. Online Communications Guidelines

What are the fundamental principles for online communications? Anything that already exists (e.g. corporate communications guidelines brand guidelines, principles of the organization)? For example, it might be “transparency, protection of privacy, respect, responsibility” things like that. Is there (or should there be) overriding online communications principles?

Are there legal disclaimers that should be applied on blogs and/or social Web accounts. Will there be “third party” (e.g. employees or chapters setting up their own social Web) where legal disclaimers (these opinions are my own) are necessary. If so, is that part of an overall communications guidelines. Who is responsible for creating and managing these disclaimers?

Tone, accuracy, transparency and consideration. These can be obvious – but are there brand guidelines about how people should conduct themselves through social Web? Is there one voice? Or many? What is the tone? Controversy OK? Political discussion okay? Current events?

Do you need to explicitly say “don’t reveal confidential information”?

Disclosure policy – if our organization is dealing with an “influencer” what will our disclosure guidelines be? What will it be for our employees who want to tweet, blog or otherwise publish under our name?

II. Social Web Structure

Is there (or where is) the map of all social Web presence for the organization (list of all Twitter/Facebook/Blog/Social Web accounts) and who is responsible for each? This includes local divisions, chapters, dealers etc...

What is the policy and/or procedure for setting up new accounts. Is there a naming convention, or a centralized local manager to approve all new accounts. Is there a mechanism to set up new properties ad hoc should a social Web manager want to “move the conversation” (e.g. set up a new blog or discussion area for a topic that starts to dominate a channel like Facebook).

III. Social Web Content Workflow

What will the process be for monitoring conversation. For example – will HQ monitor all mentions and conversations – and forward appropriate ones out to responders? Or will there be a central repository? Or, are individuals responsible for monitoring?

What is the editorial policy/guideline on content: Fundamental Principles. These should align with goals. What is the workflow – everything approved? Some approved? Do you operate as “no lifeguard on duty?”

What is the editorial guideline on comments to blog posts, or responses to tweets or facebook? (both where you can edit and you can't)

Where you Can? Moderated Comments? All Comments not considered "constructive" will be deleted – free reign?

Where you Can't Moderate? (e.g. Twitter/Facebook) How should the response be handled?

What is the editorial guideline on unprovoked negative comments?

Response? What kind of response? Where will (or will you) invite discussion (Blog, Facebook etc..?)

What is the workflow process for monitoring and responding to these?

IV. Individual Social Web Behavior and Responsibilities

At Work....

Is there workflow (from above) – and if no can they post anything they feel? (e.g. use good judgement? Get permission always? Under no circumstances say anything unless told to?)

Privacy concerns? What about mentioning other employees by name? Customers? Constituents? Partners? (always okay, get permission, never)

Personal responsibility? What are the personal responsibilities of the content producer? Will they be held responsible for anything they write?

Sensitive material, conflict resolution? Who will respond to negative or very sensitive responses or other content? Escalation process?

At Home (or on their own time)

Disclosure (e.g. get permission) before I start a blog or personal page that mentions the company?

Permission to use Trademark Material (logos etc..) in personal content (No, Get Permission or Okay?)

Is it okay for people to personally comment or respond to mentions of the company they see in other blogs? Should they?

Disaster Recovery & Crisis Management

If a provoked or unprovoked takeover – or if things were to get wildly out of control (provide examples) what should the process be? A typical answer might be - Senior Manager will notify all direct Social Web managers to cease all communications. Conference call/ Meeting will occur with all outward facing communications managers to discuss approach and communications strategy and methods.

Under no circumstances should ad hoc responses be made during this time.

Sample Social Media Intentions

Company X – Social Media Intentions

July, 2010

Prepared by:

Michael Weiss

&

Robert Rose

Company X's Social Media Intentions

A Set Of Communications Principles For Social Media

Welcome!!

We call these principles “intentions” based on the definition of the word:

Intention:

an act or instance of determining mentally upon some action or result.

- a) the end or object intended; purpose.*
- b) purpose or attitude toward the effect of one's actions or conduct.*

And so we offer these principles as a guideline for what we intend with Social Media. These are not rules – but rather principles. Our goal is to meet and exceed these principles.

For those who work with and for Company X, we all know how important Social Media has become for us to deliver our message and our marketing goals.

The information that follows here is meant to guide you with our philosophy as it pertains to the online conversations that you'll have while representing the organization. And, it's also meant to help you create your own Social Media presence philosophy.

As you know, At Company X our vision is to create widgets that exceed our customer's expectations. Our goal is to be the best company at building, selling and servicing widgets.

To that end we want to build strong, healthy and wonderfully productive online communities using social media platforms. But just as building a physical community requires a significant commitment – so too does building an online community.

We definitely think it's worth the effort – and these intentions help to guide our way.

CONNECTING WITH OUR CUSTOMERS

While we encourage everyone to participate in Social Media, we expect everyone who speaks as part of the organization to adhere to these simple but important principles.

These principles include, but aren't necessarily limited to

- Social Networking such as Facebook, MySpace, Foursquare or LinkedIn
- Micro-blogging such as Twitter, Google Buzz, Tumblr or others
- Blogs - both commenting and actual blog posts
- Multi-media sharing sites such as Flickr, YouTube, Vimeo, Justin.TV and others
- Forums or threaded discussion boards like Yahoo Groups or Ning

If you are responsible for the organization's presence on any of these social media platforms here are our intentions:

Be Responsive: If someone responds to something we've said, be responsive and follow-up quickly (e.g., a few hours). If you say something in error, do not delete the post, simply go back and update it with the correct information.

Be Responsible: If there is "hate-speech" or other extraordinarily negative or incendiary comments on our social media platforms, think before you react. Don't immediately respond, and don't immediately delete. Get an opinion from your manager prior to taking action.

Be Communicative: If you see a conversation online about Company X – regardless of whether it's on our platform, or another blog going down a negative road – communicate to your manager. Let's address this conversation head-on.

Be Discreet. Our employees and partner's personal lives are confidential. Don't post personal information about our employees, partners or anyone associated with Company X without explicit permission from your manager. Our relationships matter more than anything and we must protect their information.

Be You: Always be transparent about who you are in the organization and who you represent. Use your own real name, identify that you work for Company X and what your role is. We want you to provide your own unique and individual perspective.

Be Helpfully Promotional: Help us build a following. Promote the organization by finding and sharing information that will be interesting to our friends and followers and useful for them to share. If you're building your own personal social media presence, we also encourage you to connect with other Company X employees and partners online.

Be Aware Of Your Public View: Know that the internet never sleeps. Your presence on Social Media is 24/7/365. If you choose to associate your personal social media presence with Company X, you are representing the organization at all times and you must assume that your social media usage is visible to Company X Employees, managers and our partners.

Be Mindful Of Who You Share With: Be sure to manage what and with whom you are sharing. Keep in mind that while we all have the occasional work frustration, Facebook and Twitter are not the best venues in which to air them as those comments are available to everyone we are connected with.

Be Respectful: You know our brand, and what we represent. If you are speaking for Company X, please no remarks that are off topic or offensive. Always demonstrate respect for others' points of view, even when they're not offering the same in return. The Company X Social Media platforms are not the place to pick a verbal debate, and if someone is trying to pick one with you, always choose the high road.

Be Fully Disclosed & Honest: Never talk about any product or service in social media in exchange for cash or a promise of any kind of payment.

Be Generous & Cite References: Always Credit Other Content: It's OK to quote or re-Tweet others, but never attempt to pass off someone else's language, photography, or other information as your own or that of Company X. All copyright, privacy, and other laws that apply offline apply online as well. Be sure to credit your sources when posting a link or information gathered from another source.

Be Smart & Safe: Protect yourself and the organization. Think about your privacy, and Company X's confidential information. What you say online is widely accessible and will be around for a long time so consider the content carefully. Twitter might not be forever – but Google IS.

YOUR PERSONAL SOCIAL MEDIA INTENTIONS

Some intentions about your personal social media and how it affects Company X

Get Permission - If you want to represent the organization: If you want to use branded images, the logo and/or other Company X materials on your blog, or Twitter Account, you should ask permission.

Disclosure - If you plan to discuss Company X related information across your personal social properties, you should disclose on your “About” page or your bio that you are a Company X employee and what your responsibilities include. Please also indicate that your opinions do not necessarily represent official positions of Company X.

Your Social Media at Work: We understand that Social Media is 24/7, and we encourage you to use both the Work and personal side of Social Media during office hours, but please do try to keep it work related and don't let your personal Social Media participation take focus from your primary responsibilities.

Company X Confidentiality: Only disclose publicly available information. Don't use your personal blog to break news about Company X. When a breaking story emerges from Company X it should come from a Company X platform first – and THEN Retweeted or passed along from your account AFTER it is made available to the public.

Discussing Company X People: We ask you to remember that sharing personal information about co-workers may affect them inside as well as outside of the office. All standard HR policies apply to interactions between colleagues across the social web.

COMPANY X ON THE SOCIAL WEB

You should be aware of all official Company X Social Media platforms. Any account that you see that is not on this list – is not an officially sanctioned outlet for Social Media. All new accounts for Social Media Platforms should be approved by XXXXXX.

If you're exploring the creation of your own account with the Company X Name in it – please ask permission from your manager.

Facebook

Facebook Fan Pages will be created by XXXXXX for Company X. The administrator privileges for these pages will be granted to the people responsible for updating the page.

A list of these pages is as follows:

LIST OF FACEBOOK PAGES

Twitter

Twitter accounts are created by XXXX within Company X. All Company X Twitter pages will have the same general information in the bio and link to Company X. When possible, we will always utilize a department e-mail address or alias when registering the account to ensure that a point of contact can always be reached.

LIST OF OFFICIAL TWITTER ACCOUNTS

LinkedIn

Currently there are no LinkedIn accounts associated with Company X.

Flickr

FlickR accounts are created by XXXX within Company X. All Company X FlickR Accounts will have the same general information in the bio and link to Company X. When possible, we will always utilize a department e-mail address or alias when registering the account to ensure that a point of contact can always be reached.

YouTube

If you would like a video posted to Company X's YouTube channel, contact XXXXXX