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Etiquette before engagement: Establishing social media protocol

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My last column focused on the importance of listening to social media conversations before engaging participants in a dialogue of your own. I wrote that listening is the most important phase of implementing a social media plan. Now that you have tuned in to what is being said about your company, project, or topic of interest, it is time to tackle the most difficult phase of social media planning: developing a protocol document. The purpose of a protocol document is to provide community managers - whoever will oversee your presence on Twitter, Facebook, Yahoo! Groups, etc. - with a step-by-step map for dealing with your day-to-day social media activities.

Protocol development is the most difficult stage of new media planning because it requires you to exercise enormous self-restraint. I tell my clients and colleagues in real estate that engaging in social media is like attending a never-ending public hearing with no moderator, where your stakeholders never sleep and have an infinite number of questions and comments. This hearing is broadcast beyond the airwaves of local cable access TV via message boards and blogs into the inboxes of government officials, your competition, or others who might seek to assist or impede your project. While the temptation is to immediately engage this online forum and respond to the conversation, you will benefit greatly by entering the social media space with a well developed plan of action.

At Schneider Associates, the steps we take to create a social media protocol document are similar to those that go into developing a town meeting community outreach or new product launch plan. Start by asking yourself a few simple questions:

- *What do I hope to accomplish by joining the social media conversation?
- *What are my primary messages that will help me achieve those goals?
- *What tone will most effectively convey these messages to my online communities? Should my posts be friendly, informational, conversational, funny?

Your answers will inform the content of your social media protocol document. The protocol documents we create for our clients vary depending on the project, product or reason for social media engagement, but they all contain the following four components:

Social Media Message Guide

A social media message guide will establish parameters for all of your communications when using social media. It should include your single overriding communications message and tone, key objectives, supporting messages, facts and figures, keyword lists for ongoing listening efforts and frequently asked questions. Construct your guide so that a community manager with knowledge of social media, but no existing information about your plan, can quickly learn the dos and don'ts of your social media initiative before conversing on your behalf.

Social Media Editorial Calendar

Public relations and advertising professionals use editorial calendars to track topics scheduled for coverage in print, broadcast and online media outlets. In a similar manner, a social media editorial calendar will serve as a primary source of information for planning your social media communications. For example, if you are working on a new mixed-use development, identify key project milestones from planning and permitting through construction and marketing. These events are not only a great way to generate traditional media hits, they are also excellent conversation starters for your online communities.

Assessment Plan

Assessing social media conversation requires careful consideration of the varieties of comments and feedback you might receive, and the formulation of an action plan that details a specific response for each type of comment. We recommend classifying social media messages as positive, neutral or negative, and assigning a different level of reaction as you move from the extremely positive and negative comments to more neutral posts at the center of the scale.

Measurement

The protocol document should also include a plan to track and report on the progress and impact of your social media campaign. I would set aside time on a weekly or monthly basis to review both qualitative metrics (Is your outreach affecting what's being said about you or your project online?) and quantitative metrics (How many people are following you on Twitter? How many conversations are you having each week?); and use what you learn from measurement to update and improve both your social media plan and protocol document.

Now you are ready to get working on your protocol document! In my next column, I will discuss social media engagement and how to start implementing your social media plan. In the meantime, I encourage you to join in the conversation with us.

Philip Pennellatore is executive vice president/partner at Schneider Associates, Boston, Mass.

New England Real Estate Journal - 17 Accord Park Drive #207, Norwell MA 02061 - (781) 878-4540