SOCIAL GOVERNANCE 101: A PRACTICAL GUIDE TO PROTECTING YOUR BRAND

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INTRODUCTION

The social media landscape is a deep ocean of wondrous opportunities for businesses – but there are plenty of sharks in those waters. For every opportunity to innovate and excel in social media, there’s the opportunity to drown, as well. Are businesses ready for the challenge?

According to a 2013 Grant Thornton study, while 71% of businesses are concerned about the potential risks of social media, only 36% engage in social media training and 33% have clearly defined social media policies. That doesn't sound like the majority of companies are navigating the social media seas very safely; it sounds like they're barely keeping their heads above water.

For businesses on social, the risk of just keeping their heads above water could be detrimental. Think of how much water is being swallowed, how much is seeping into their lungs and how far adrift they are from their customers – the people with whom they need to be engaging consistently.

Comprehensive social governance gives brands the opportunity to become an Olympic swimmer, cruising through the water so quickly, risk doesn't stand a chance of slowing them down – and neither do their competitors.
WHAT IS SOCIAL GOVERNANCE?

When most people think about governance, terms such as compliance, security and control come to mind. But the proliferation of social has complicated the definition. Social governance isn’t about maintaining strict control over your social presence, it’s about managing the experience of all those who interact with your brand through social.

It’s about analyzing and optimizing every customer touchpoint.

Social governance involves anticipating every possible customer interaction to determine who is best-suited to respond, creating a map of how the interaction should unfold, deciding who is authorized to continue the relationship and so on. Rather than playing defense when social-media-related crises happen, well-executed social governance puts companies on the offense.

It’s planning way in advance so that the unexpected never happens.

**When executed correctly, the outcome of social governance is simple: customers enjoy a positive, seamless brand experience.**
SOCIAL GOVERNANCE IS A LABOR OF LOVE

by Andrew Banaz of Allianz Life

What is social governance? It goes way beyond just compliance, crisis mitigation or brand management. It’s proactive measures that we take every day in order to ensure that our brand is portrayed in the right way across all touchpoints. It’s an essential part of how we create the right social experiences for our customers.

GOVERNANCE TAKES PLANNING AND DEDICATION

When we were building out our governance framework at Allianz, we met with multiple companies to learn best practices – things that work and things to definitely avoid. We examined industry case studies. We brainstormed, revised, then went back to the drawing board. All in all, planning out our governance framework took about 12 months. Execution took an additional three months.
Some might think this is over the top. But it was necessary.

We’re a financial services company. There are numerous regulatory bodies to which we must adhere. This means that every message, comment and RT needs to pass through all the necessary checkpoints.

SOCIAL AND REGULATIONS = RECIPE FOR DISASTER?

Compliance and social don’t always play nice with one another. The more checkpoints there are, the slower you are at responding on social.

We didn’t want to be in a situation where it took weeks or months to publish a single tweet. We wanted to be responsive on social – to help our customers if they have issues.

Establishing a governance framework allows us to be effective and engaging on social, but in a safe way.

WHAT SOCIAL GOVERNANCE LOOKS LIKE AT ALLIANZ LIFE

Before a social message goes out, we have a branding review, compliance review, legal review and government relations review. Depending on the nature of the message, up to two dozen people could be involved. Thanks to well-thought-out policies, response matrices and custom approval paths, this can be turned around within 24 hours.

Our governance framework allows us to function at the speed of social.
THE RISKS OF TOO LITTLE SOCIAL GOVERNANCE

Great social governance doesn’t come without serious work and many organizations are familiar with the difficulties that arise when governance isn’t up to snuff.

CASE STUDY: US AIRWAYS’ (ACCIDENTAL) PORNOGRAPHIC TWEET

Talk about getting your wires crossed. In an allegedly innocent error, a US Airways employee attempted to flag an inappropriate photo that was tweeted at the brand. Instead, the employee copied the image and attached it to a tweet, which was sent to another customer. It was bad. Really bad. Though the pornographic photo was taken down within an hour, the damage was definitely done.

This social snafu could have easily been avoided with proper social governance and here’s how:

INTELLIGENT WORKFLOW:
Prior to any social media post going live, a process is put in place that designates the type of campaign and user who will create the content, as well as which team and individuals need to sign off before publishing.

With the right workflow, the pornographic tweet would have made it only as far as the first round of approvals. At that point, the gaffe’s biggest claim to fame would be as the most outrageous story in the company break room.

DESIGNATED CONTENT LIBRARY:
Visuals are a fantastic way to engage consumers – as long as they’re all in good taste and support the brand. By creating a library of approved images, staffers can find just the right way to illustrate each post without having to evaluate the risk of each one on their own.
CASE STUDY: HMV SOCIAL HIJACKING

British entertainment retailer HMV recently discovered that hell hath no fury like an employee scorned.

When employees with access to the brand’s Twitter account discovered they were about to be fired, they took to social to live-tweet their dissatisfaction.

One of the rogue HMV tweets read,

“JUST OVERHEAD OUR MARKETING DIRECTOR (HE’S STAYING, FOLKS) ASK ‘HOW DO I SHUT DOWN TWITTER?’”

Unfortunately for HMV, there is no kill switch for Twitter. With proper social governance, however, there can be protective solutions.

Here’s how a comprehensive social governance program could have changed everything that day in the office:

ROLE-BASED PERMISSIONS:
Rather than handing employees all the keys to a brand’s social media castle, employees would only have access to the accounts, features and functions relevant to their roles.

REGULATED ACCESS POINTS:
Each individual should have a separate login that grants them access to the necessary (and only the necessary) social media accounts. This limits the number of people with direct access to native social accounts.

CONNECTION TO AN ACTIVE DIRECTORY:
Larger enterprises usually have active directories – the moment an employee becomes an ex, they’re closed off from all company accounts and can no longer view confidential information. An enterprise-grade social media platform should connect to this directory – minimizing the risk of disgruntled employees using social as a megaphone for their frustrations.
THE EIGHT AREAS OF SOCIAL GOVERNANCE

The fear of becoming associated with a social media horror story is enough to make any brand nervous. That fear can also cause brands to be overly cautious on social – choosing to avoid it altogether. But while you can hide from real-time conversations, you can't stop them. Customers will be talking about your brand regardless of your participation. The only option left is to develop a comprehensive social governance framework.

Proper social governance often goes under-noticed because there are no dramatic stories to tell. There are no headlines about a huge Twitter #fail. There are no highly-publicized security breaches. Great governance ensures that discussions around the brand stay focused on its great products and even better customer service.

Successful social governance allows innovation with guardrails.

There are eight focus areas that a governance framework must touch to truly protect a company from all angles:

I. SOCIAL BUSINESS ETHICS
II. TECHNOLOGY
III. SECURITY
IV. PRIVACY
V. SOCIAL PROGRAM GOVERNANCE
VI. EMPLOYEE AND EXTERNAL GUIDELINES
VII. CUSTOMER FOCUS
VIII. CRISIS MANAGEMENT
I. SOCIAL BUSINESS ETHICS

Most companies have a code of ethics – after all, everything a business does ultimately relates to ethics. In the digital world, this code of conduct needs to extend to the brand’s activities on social.

What is the brand’s online personality? On what principles does that persona operate?

Outlining your brand personality is a crucial job that might require creating a specific steering committee with a deep understanding of both the brand and the social space. This team should create short- and long-term visions for the brand’s social experience and update the company’s current code of ethics accordingly.

This policy should be widely available internally and understood by all employees. It should also be updated regularly in order to reflect the changing landscape.
II. TECHNOLOGY

A robust social governance program is many things. Some, like the internal policies governing employee behavior, are simply a matter of management; others require real investment. Technology falls into the latter category.

Technological needs depend greatly on the size, industry and social investment of the company – and can range from custom application development to integration with legacy systems.

That being said, all brands should invest in a capable, integrated social media management system. Choosing an integrated platform, rather than relying on disjointed tools, means that your entire social media presence from engagement to CRM to listening to reporting is in one place. When you need 12 different departments to sign off on one piece of content, this otherwise overwhelming process will happen seamlessly.

Integration gets every department and location across the organization working on the same team and toward the same goals. As a result, every customer touchpoint is optimized to deliver the same brand experience.
III. SECURITY

A brand operating one Twitter account and an Instagram feed might not have a huge security risk on their hands. A company with thousands of social accounts across multiple platforms and countries, on the other hand, has a vastly different security situation.

For large organizations, limiting access to native social accounts is the first step to brand security. This means strict log-in criteria, role-based permissions and the ability to quickly change or shut off individual user access. By managing the various entry points to corporate social accounts, brands reduce risk of account breaches.

Another important step in enterprise security is partnering with the right software vendor – one that offers enterprise-grade security. Make sure your social media management system has SOC 1 TYPE 1 and SOC 1 TYPE 2 Certification. Having SOC 1 Type 1 means that the vendor has the necessary operations policies and procedures in place and that these have been audited and approved by a third party organization. SOC 2 Type 2 means that the vendor is protected against unauthorized access, the information you store within the system is protected and any customer data collected, used and stored in the system is also protected.

Companies should also have security policies that define the nature of company information and set boundaries around what is and isn't appropriate for sharing within social media. This includes conversations about sensitive, restricted or classified information that drive competitive advantages, anything related to trade secrets and other sensitive materials.

Lastly, it’s important for employees to understand how integral they are to the company’s security. Security awareness and training should be mandatory for all employees and cover such issues as password management. As security threats evolve, everything from a company’s minimum security standards to security training programs should be reviewed and updated on a regular basis.
IV. PRIVACY

In an optimal brand experience, consumers aren’t just protected by a great privacy policy; they feel better about the brand because of it. A privacy policy should not only be thorough and effective, but easy to find and understand. Maintaining transparency is an integral part of making sure customers feel safe.

Companies should consider employing a framework that defines and prioritizes specific areas of privacy, focusing primarily on sensitive data. This framework, sometimes referred to as a Privacy Impact Assessment (PIA), can be used to classify privacy levels for any inbound and outbound programs.

Your company should have a documented process for identifying Personally Identifiable Information (PII), as defined by federal and local privacy laws. This process should clearly define and classify different levels of company and customer information. PII is typically defined as any information that can be used to distinguish or trace an individual’s identity. The privacy policy should therefore be used to govern marketing, PR, customer service and any company programs using social media that request or track information from participants. This includes names, addresses, emails, credit card information and dates of birth.

Asking for access to customers’ private information comes with great responsibility. Brands should be prepared to answer every conceivable customer inquiry about privacy, then make this information publicly available. In the digital age, most companies publish on their websites digital privacy policies that offer full disclosure into the way the firm uses browser cookies, advertising practices, newsletter practices and digital information collection process. These policies should set general expectations around the collection, use, storage, retention and sharing practices of any PII gathered during social media and other digital experiences with the brand.

Many companies may want to certify that they adhere to standard privacy policies set forth by third-party guidelines – one of which being the US & EU Safe Harbor Privacy Standard.
V. SOCIAL PROGRAM GOVERNANCE

In order for a social governance program to work, there must be continuous governance over the program. Just as the social media space is always shifting, so must the policies and tools a company uses to maintain its governance program. How many social policies could have handled Snapchat two years ago—or Pinterest five years ago? Likely none. As industry regulations change and the functionality of each network evolves, how a brand governs each network should evolve as well.

This is best accomplished through the creation of an executive review committee. This group should be intimately familiar with both the brand and the social environments in which it operates. It should also include members from different functions—marketing, PR, customer service and other teams that use social media regularly.

The committee’s first task should consist of auditing and researching the current state of social to uncover potential challenges and opportunities, such as shutting down inappropriate or abandoned accounts. This action will establish the context for a long-term plan to govern the social program. Based on this analysis, the committee can create a governance framework based on the brand’s needs and desired level of investment.

Once the plans are in place, the committee will meet regularly to analyze program performance—making adjustments where needed—and revise its own methods to keep up with the demands of a changing social environment.
VI. EMPLOYEE AND EXTERNAL GUIDELINES

Having a solid set of social media guidelines in place is an integral part of any social governance program.

Social guidelines are an opportunity for employers to be clear with their employees and audience about the goals and expectations of a social team. Too-broad or overly-simplified expectations can give employees too much leeway to misrepresent the brand. But overly complicated or pedantic rules can lead employees to be too wrapped up in the letter of the law rather than the spirit of social, causing a whole new set of issues.

Well-crafted social media guidelines motivate and inspire employees when communicating on behalf of the brand. They help to ensure that the proper tone, etiquette and quality of service is delivered consistently to all audiences.

Keep your guidelines clear and easy to understand. Larger corporations should establishing different guidelines for different brand relationships – one for employees, one for agencies and one for third-party sponsored/incentivized relationships – to take into account the unique nature of each relationship.

And as with all other areas of social governance, these social guidelines should be updated regularly and publicly available.
VII. CUSTOMER FOCUS

Every business has customers, but those customers are as varied as the different products and services each company offers. In order to create a truly seamless brand experience through social governance, it’s necessary to specifically define the brand’s customers. Who are the company’s social customers and what are they looking for? Based on who those people are, what does it mean for the brand to be customer-focused from a social media perspective? Knowing the answers to these questions will drive a brand’s entire customer experience.

Employees should understand the voice of the customer, the voice of the brand and the experience they are trying to deliver.

Dedication to customer focus also means putting in a place a process to guide each customer complaint, comment or question through a feedback loop. This way, customers know their feelings are validated. If follow-up surveys are used, the feedback loop will determine the process for reaching out to and collecting responses from customers. If a customer conversation becomes multimodal, the feedback loop will also address the appropriate way to transition from social to phone or whatever means of communication works best.

How do you know if your feedback loop is successful? Internal social customer response auditing allows a company to evaluate its own customer experience by collecting a random sample of social conversations between employees and customers for analysis. This information can be used to improve the feedback loop, catch poor employee performance and ensure quality in all social interactions with the brand.
VIII. CRISIS MANAGEMENT

Effective crisis management can be the difference between a small ‘oops’ and a full-blown catastrophe that hurts the bottom line. Every brand should be equipped with the following essentials to manage a crisis:

CRISIS MANAGEMENT DREAM TEAM:
Crises can happen to any brand, at any moment. That’s why training a team to be at the ready when a crisis comes knocking is a brand’s best survival tool. These individuals will be tasked with leading and coordinating the company when responding to a brand crisis.

CRISIS CALLING TREE:
The crisis team should put together a contact list that includes the names, phone numbers and email addresses of department heads and members of the crisis management dream team. During a crisis, the crisis team leader will be responsible for activating different branches of this calling tree in order to escalate the situation and get the right people involved.

WARNING SIGNALS:
An enterprise-grade social media management system should be equipped with volumetric-based and influencer-based triggers. These signals will fire off alerts when there’s a spike in activity around the brand – i.e. when a story goes viral – or if an influential figure is talking about the company. These warning signals will help your internal teams start any necessary crisis preparations.

CRISIS SCORING MATRIX:
What is a social media crisis? A day with more negative tweets than usual? When there’s a product failure? For each company, the answer may be slightly different. Thus the need to develop a customized scoring matrix outlining specific criteria (e.g. Does this affect sales? Does this involve an executive member? Is this related to a product?) and assigning weight values for each. In the event of a crisis, the score will indicate the level of priority in which the brand should respond. To see an example, click here.

FIRE DRILLS:
No plan is successful without rigorous testing. Scheduling fire drills for your crisis management team (under both ideal and unideal circumstances) helps to determine gaps and improvement opportunities.
When I started working at the American Heart Association in 2010, social was in an early experimental stage. It was about trying new ideas, new presences and seeing what worked and didn’t work.

Like many others, we’ve evolved and refined our strategy, tactics and governance. As the first full-time social media community manager, I’ve seen our team grow to more than 80 individuals who are goaled around social media across the country. While this increased focus is very exciting, we’ve had to re-evaluate our organizational goals and strategy – as well as how we can use social as a vehicle to get there.

We can’t push messages that don’t resonate with our community anymore. We need to listen to our consumers and create experiences for them with our
brand. It makes it less about social, less about the brand and more about our consumers. One thing I love about my work is having the privilege be there for community members who are going through a rough time or have an ailing loved one. Sometimes, we give people helpful resources; other times, we simply offer a virtual hug – letting them know someone's there who cares.

THE ROLE OF SOCIAL GOVERNANCE

Through governance, we’re able to set guidelines and procedures for the whole organization. Governance makes it possible for our social media community managers to speak in one unified tone – whether they’re in L.A. or a small town in Ohio – to create a fluid experience for our consumers. At the same time, our governance framework is also flexible enough for local offices to feel empowered to make their own decisions. If we have a campaign, each affiliate decides how much, or in what way, they should participate.

We set overarching guidelines and have a playbook at the national level; but our affiliates drill down and decide what works best for them. An organization with a flexible social governance structure – rather one where the national center barks orders downwards – spawns collaboration, mutual respect and social success.

MY ADVICE FOR OTHER BRANDS

Social governance does not happen overnight. Be okay with this and take your time. There’s a lot of figuring out to do, so you must work together. Governance has to be a collaborative process. If you try to push it down on people, it won’t work. Lastly, social governance requires maintenance. Social media is constantly changing. Your governance structure needs to be reviewed frequently to ensure it is up-to-date.

Social governance takes a lot of work and dedication, but the fruits of your labor will be worth it. When you have social governance, you’re able to deliver better online experiences and ultimately better relationships with your consumers.
HOW TO EXECUTE SOCIAL GOVERNANCE

No piece of the social governance framework will simply spring into being. With so many moving parts, each must be regulated in a way that will ensure proper execution. All eight functional areas should pass through four levels of development: defined, instrumented, enforced and dynamic. A scoring matrix (located on the next page) can be used to track the process of each.

DEFINED
Before working on any step of the framework, it’s critical to define what that work will look like. For each functional area, a clearly documented and approved governance protocol should be put into place. This protocol must be internally published, revised and easily available to employees.

INSTRUMENTED
For all areas of the framework, multiple procedures are necessary to meet the appropriate goals. These operations should be prepared to scale for all teams across the organization. This means identifying bottlenecks and weaknesses in processes, so that teams can grow and improve.

ENFORCED
Once the processes and procedures are in place, they should be enforced with qualitative reporting on the organization’s performance. If standards aren’t being met, a plan should be put in place to enforce consequences for high-priority violations and maintain follow-up communications for lower-priority issues.

DYNAMIC
Just as so many aspects of social governance are continually evolving, so is the governance of each functional area. As social network policies change and new governmental regulations emerge, each piece of the framework should be regularly reviewed and revised.
### SOCIAL GOVERNANCE SCORING MATRIX

If you’re building out your social governance framework, start at the Defined stage. Check off all eight areas of social governance – ethics, technology, privacy, etc. – before moving to the Instrumental stage. Continue doing this until you reach the Dynamic stage and have a score of 32/32.

If you’re revamping a current model, audit your brand’s social governance using the matrix. Your brand should ideally be at the Dynamic stage across all eight areas. If not, build out the weaker areas and work toward a score of 32/32.

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**WHAT’S YOUR TOTAL SCORE?: _____ OUT OF 32**
CONCLUSION

There’s no doubt about it: creating a comprehensive social governance program is no small undertaking. But without it, the inevitable issues that arise require even more time and effort to manage and repair.

In 2014, social governance is the new social media management, and every company with a significant investment in social must embrace this reality. That means implementing a rigorous governance program designed to keep the business secure, compliant and competitive, and to give customers consistently amazing experiences with their brand. Companies that do so won’t just keep their heads above water when it comes to social; they’ll win the race.
Sprinklr believes people never forget how you made them feel. That's why we help brands manage their customers' social media experiences by building software that connects every social media experience to every enterprise system.

Unlike tools and platforms, Sprinklr is the only end-to-end integrated social relationship infrastructure. Called "the most powerful technology in the market" by a leading analyst, Sprinklr accelerates the social maturity of a brand from just 'doing social' to being social, at scale. Sprinklr’s cloud software and strategic and analytic services enable the enterprise to innovate faster, grow revenue, manage risk and reduce operational costs.

We created Contently because the world of publishing is changing around us. In the midst of the disruption of traditional journalism, digital advertising and social media, throngs of talented journalists and creative storytellers are striking out on their own as freelancers – and not necessarily by choice.

At the same time, nontraditional publishers are rising – brands, nonprofits, and lean new media companies – all of which need talent and efficient ways to manage, measure, and achieve business results with content.

Our passion lies in helping those freelancers succeed, and in doing so allowing anyone to become a publisher that tells stories people care about. No longer are we bound by so-called rules of who can be a publisher and who can't. The Internet changed that. At Contently, we’re devoting our talents and resources to leveling the playing field and building a better media world for everyone who has a stake in it.