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Your Guide to Developing your Company's Social Media Policies and Employee Guidance Booklet — Phew…what a long title.

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How to Use this Guide

Social media is an indispensable tool for businesses aiming to expand their reach, attract new clients, and engage with existing ones. As such, effectively leveraging it is a must for staying competitive in today's digital landscape, no matter how large or small your company.

You may not realize it, but your employees are your brand's most powerful advocates. Allowing them to engage on social media channels to share positive brand experiences and promote your products and services can increase your brand's reach, improve customer engagement, and drive conversations. Social media guidelines give your employees the tools and knowledge they need to talk about your brand(s) in the most accurate, effective way possible. Perhaps most importantly, clear guidelines serve as a roadmap for your personnel on how they should conduct themselves on social media channels.

Social media provides businesses with a unique opportunity to engage with existing and new customers, build trust, and learn valuable insights into their needs, preferences, and pain points. By providing informative content and responding to customer inquiries, companies can foster customer loyalty and strengthen brand awareness.

Here, we share the benefits of establishing social media guidelines along with some best practices for safely leveraging this powerful tool.

Make it Your Own

We've provided this in MS Word so that you can quickly reformat and use the material to create your own, company-specific guide for your employees. When drafting your own policy, we recommend that you include leadership from HR, Legal, Sales, and Marketing, and then have a final sign-off from the president or another high-ranking executive.

Contents

Value of Social Media to Industrial B2B Companies

When properly executed, social media provides content that is perceived as valuable to your audience, and can drive sales opportunities and grow awareness of your company, products, and brands. Before embarking on a social media program, however, be sure to discuss the value of the initiative with your employees and how they can participate.

The first step is to explain the benefits for the company and its marketing team, such as:
- More sales leads
- Broader brand awareness
- Greater website traffic
- Lower customer acquisition costs

Some Specific Benefits

Encourage employees to join, follow, like, and share the company's social media sites and posts. Doing so means that the company's brand presence will become more visible, in turn attracting the right partners, customers, and employees.

For the Sales Team
More conversations with decision-makers, more potential opportunities, increasd sales pipeline.

For the HR Team
Attract more employees, lower hiring costs, faster time-to-hire.

For Leadership
Increase brand awareness, boost revenues, positively impact the bottom line.

Define your Company's Social Media Goals

To ensure social media success, clear objectives and goals should be set, helping employees to stay on track and make the most out of your social media marketing strategy.

Here are a few examples of social media objectives:
- Build brand awareness
- Drive traffic to website
- Obtain leads
- Boost user engagement
- Enhance brand reputation
- Understand your customers

For each objective, set SMART goals.

Specific	Goals should be clear and simple yet defined.
Measurable	Goals should have the ability to be measured by at least one metric.
Attainable	Goals should be realistic so you can achieve them.
Relevant	Goals should relate to your business strategy, helping you reach the bigger picture.
Time Specific	Goals need an achievable timeframe, whether it is a few months or a year.

Example:

Goal	Increase Brand Awareness
Specific	We want to increase brand awareness by creating and posting new content twice per week
Measurable	Our goal is a 5% increase in our total number of social media followers
Attainable	Our followers increased by 2% last month when we began posting content more frequently
Relevant	Increasing brand awareness will help drive more interest in our products and services
Time	1 month

Once you have clearly defined objectives and goals, share the plan with employees. This not increases transparency, but also encourages participation.

See the worksheet on the next page.

5x5 Social Media Guidance

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Social Media SMART Goals Worksheet

Goal # 1	
Specific	
Measurable	
Attainable	
Relevant	
Time-Bound	

Goal # 2	
Specific	
Measurable	
Attainable	
Relevant	
Time-Bound	

Goal # 3	
Specific	
Measurable	
Attainable	
Relevant	
Time-Bound	

Goal # 4	
Specific	
Measurable	
Attainable	
Relevant	
Time-Bound	

Goal # 5	
Specific	
Measurable	
Attainable	
Relevant	
Time-Bound	

Create Your Social Media Policy — Draw Clear Lines in the Sand

Your social media policy should be clear, concise, and timely. It should cover all the relevant aspects of social media use within your organization, including what is acceptable and unacceptable behavior, how to properly handle customer complaints and negative comments, and how to protect confidential information. The language should be simple enough for all employees to understand; avoid legal or marketing jargon. Make sure that the policy is regularly updated with any changes in law or industry best practices. Finally, provide training for all staff, from the proper posting of content to safety protocols for engaging with others online. This policy should also include examples of acceptable and unacceptable behavior, should be reviewed and updated annually, and placed in a prominent location for all employees to see.

A few things to consider when creating a corporate social media policy:

- Identify the types of customers/prospects employees should or should not engage with online.
- Teach them how to recognize and avoid trolls and negative comments that don't warrant a response.
- Define the social media platforms to which the policy applies
    - Steer clear of hot button issues like politics, religion, and sensitive social issues that could reflect poorly on the company.
    - Legal and confidential information: Employees should know what can and cannot be shared outside the company.
    - PPE: Ensure that any images and video depict a safe, clean working environment.
    - Background images: Ensure the environment behind the focus of the image or video is clean and devoid of questionable items, such as trash, unsafe practices or pinup model style calendars or photos on tool boxes or machine cells.
    - Hashtags: Make sure employees know the recommended hashtags that they can and should use when sharing content on social platforms.
    - Brand Voice and Tone: Is there a corporate tone or language that they should follow?
    - Consequences of company violation
    - Whom to contact for questions

Some examples of guidelines you can learn from:

INTEL: https://www.intel.com/content/www/us/en/legal/intel-social-media-guidelines.html

XEROX: https://youtu.be/W2gedew0aA4

Social Media Policy Template

PURPOSE

State the purpose for how the company uses social media and approaches it as a communication tool. Write in 1-3 sentences.

DEFINITION

Define what is considered "Social Media," and differentiate between personal use and use on behalf of the company.

SUPPORT

Who is a trusted resource or subject matter expert that employees can go to with questions? Based on the nature of the question, this could include internal or external experts, and there may be several people assigned for different topics.

COMPANY BRANDING & HASHTAGS

Provide a snapshot of how to present the company's brand standards for logos, colors, and name of the company on social media as well as a listing of hashtags associated with each product or company brand.

COMPANY CHANNELS

Identify the specific social media channels that the company uses and provide QR codes for employees to quickly find and follow each.

Assign the Right People and Ensure They Are Trained

ACCESSING SOCIAL MEDIA

Explain the risk of employees using personal social media accounts on behalf of or in reference to the company. Include guidelines for time spent during working hours for using social media, noting when it's beneficial or considered part of job responsibilities.

DISCLOSURE & OPINIONS

Be explicit in the company's position: Employees have sole responsibility for what is posted to their social media accounts. Refrain from vulgar and obscene language and what is acceptable when including comments or posts about the company and co-workers. Employees must disclose their work and the employer when pertinent.

CONFIDENTIALITY & PRIVACY

Identify the types of confidential, trade secret, and private information that must not be shared online for any reason.

CONSEQUENCE

Given that this is part of a formal policy, consequences for not abiding by it must be clearly stated. The same might be included in an employee handbook and provided during onboarding of new employees.

Now that a social media policy has been established, the next step is employee training. Don't assume everyone at your company knows exactly what to do when it comes to sharing your company's story. Set up simple and fun training sessions for your employees who aren't social media savvy.

Don't force employees to participate. Not everyone may have the interest or desire to engage on social media on behalf of the brand. Rather, rollout the program to a small group of passionate employees who can act as your ambassadors and let interest in the program grow organically.

The training should show employees why their advocacy matters to the company and to them professionally. Show them how their efforts build the company up and help marketing, sales, and recruiting efforts.

Encourage them to share the content that has been posted on the company's social medial channels. Make social activity a part of work culture and the onboarding process.

Next, leverage your company's experts. They have technical know-how about the your products and applications, industries served, and customers. Furthermore, ensure they have the time to monitor, respond to comments, and generate and post content on a regular cadence—we recommend weekly posts at a minimum. And, ensure that they have good smartphones or video equipment and editing software to produce the content.

Socially trained employees

- Will yield 3x more impressions
- Will generate between 30 – 50% more engagements
- Source 2x the amount of clicks
- Have the expertise to create influential content
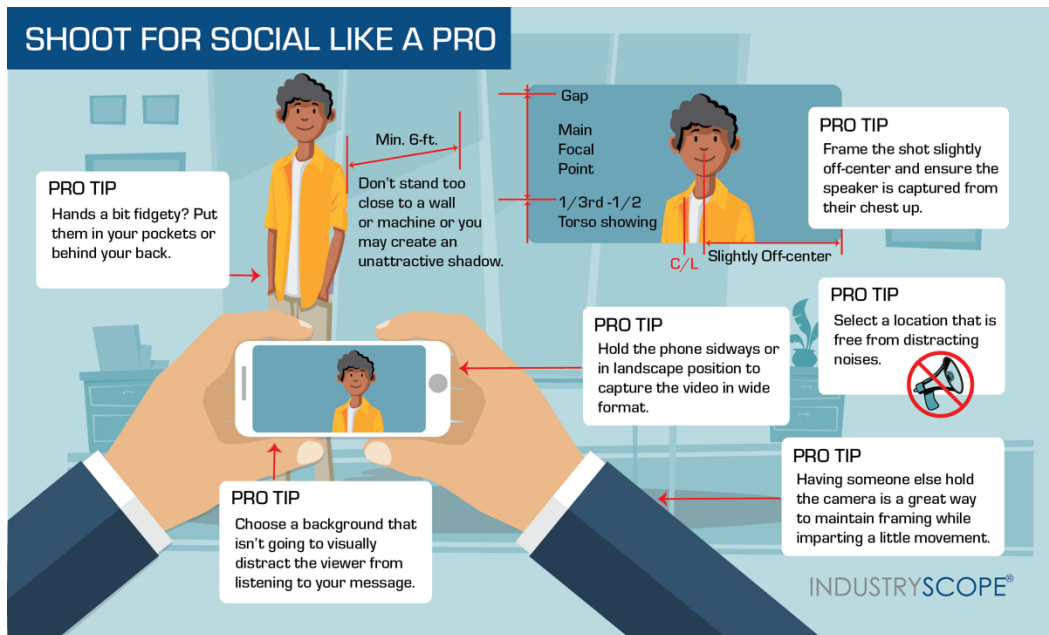
Choose The Right Channels

Each social media platform has its own personality and means of communicating. Your products and services, brand personality, business type, and corporate activities should influence channel selection. Ask the following questions when considering which social media channels to engage with:

- Is your intended audience active on the site?
- Are your competitors and peers using the channel? If so, how well?
- How far-reaching are your channels and do you need support from international colleagues?
- Do you have the ability to sustainably generate meaningful?
- What demographics are represented by the channels you are considering?
- Do you have a specific plan and assignments for each channel selected?

Some considerations for various channels that may be appropriate for your business…

LinkedIn
LinkedIn is a professional networking site and the top platform for B2B social media marketing. We recommend LinkedIn as a primary channel for building company and product awareness and generating website traffic for industrial B2B. Furthermore, LinkedIn is a great recruiting source for attracting top talent. We suggest posting at least once weekly, although posting too often may cause people to unfollow your account.
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LinkedIn Statistics
- 875 Million Active Users Worldwide
- 52 Million Users Look for Jobs Weekly
- In 2022, LinkedIn Saw a 22% Increase in Engagement
- 1/3 of Company Engagement is from Employees
- 60% of Users are Between the Ages of 25 – 34 Years Old
- LinkedIn Is the Top Platform for B2B Lead Generation
- 65 Million Users Are Business Decision-Makers
- Weekly Posts See Twice the Engagement

Source: The Social Shepard

Twitter
We recommend Twitter as a primary channel for building company and product awareness during corporate events such as tradeshows and open houses. Doing so helps drive 'foot traffic' to your location and increase awareness of your brands and services. That said, you can repurpose LinkedIn posts on Twitter and engage with users who consume your product. Be aware that team members should have the bandwidth to address positive and negative comments quickly, otherwise we suggest adopting this channel for posting ahead of and during events only.

Twitter Statistics
- 396.5 Million Users Worldwide
- 10% of Twitter Users Are Responsible for 92% of Tweets
- 33% of Users Follow Companies
- 79% of Users Follow Brands
- The US has the most Twitter users with 77.75 Million Active Users

- 38.5% of Users are 25-34 Year Olds

Source: The Social Shepard

Facebook

We recommend Facebook as a primary channel for HR use to showcase company culture, industry-related news, attracting skilled workers, and for customer service purposes. It also is a top raking business directory.

Facebook Statistics
- 2.95 Billion Monthly Active Users on Facebook
- 23.7% of Facebook users in the United States are between the ages of 25 and 34.
- The platform sees higher usage among people below the age of 44
- 60% of consumers use Facebook to get customer service

Source: Hootsuite, Sprout Social,

YouTube

We recommend YouTube for posting of all video content; if you can consistently generate engaging videos that address your audience's needs, then prepare a generation strategy that delivers short, informative, and engaging content. Done right, YouTube can be an excellent channel for building awareness of your company and driving lead generation.

YouTube Statistics
- 2.6 Billion Active Users Worldwide; 247 Million are in the US
- YouTube is the world's largest video-sharing platform and second-largest social media
- 62% of Internet Users in the U.S. Access YouTube Daily
- 40.9% of Watch Time Happens on Mobile
- The majority of YouTube users are between the age of 25-34 (20.2%)
- The 2nd age group is between 35 – 44 at 16.5%
- Content for "Beginners" Increased in Popularity by 50%

Sources: Demand Sage, The Social Shepard

Instagram

We recommend Instagram if you can consistently generate engaging video content that addresses your audiences needs. The average Instagram business account posts once per day, but this requires significant dedication to content development, otherwise weekly postings will provide solid traction. Done right, Instagram can be an excellent channel for building company and product awareness.

Instagram Statistics
- Over 1 Billion Instagram Users Worldwide
- 157.1 million users in the US
- Instagram is the Fourth Most Popular Social Media App
- 60% of Instagram users are between 18 – 34 years old

- Instagram Reels Receive More Engagement Than Regular Videos
- 90% of people on Instagram follow at least one business1
- 81% of People Use Instagram to Research Products and Services
- It's the second most preferred platform for customer service (Facebook is #1)

Source: Instagram, The Social Shepard, Spout Social

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Figure Out What Content Works and Determine the Right Engagement Level for Your Business
This step requires research of the selected channels to determine the types of content the company should generate. See what's working within the target community (and what's not) and learn from your competitors. Once you've made this determination, do some testing to see what's most effective for you.

Social Media Cheat sheet					
	LinkedIn	**Twitter**	**Facebook**	**YouTube**	**Instagram**
Differentiator	Professional-driven platform	Fast-moving, real-time, news driven	Large social network. Customer/employee relations.	Largest video-sharing/watching platform	Brand-building
Best for	Foot-traffic Brand Awareness Engagement	Link clicks Engagement Foot traffic Event registration	Link Clicks Brand Awareness Engagement Event registration	Brand Awareness Foot traffic	Foot-traffic Brand Awareness Engagement
Types of Content	Thought leadership, Long-form content, Customer Testimonials How-to Guide, Educational content, Brand Awareness, Culture & Company Values, Recruiting, Professional events	Events, Announcements, Real-time news, Product Updates, Special offers, Giveaways, Contests Questions	Company Culture, Recruiting (skilled and general labor), Customer Service, Events, Giveaways, Contests	How-to Guide, Educational videos, Product demonstrations, Brand/Product Awareness, Customer Testimonials, Influencer Testimonials	How-to Guide, Brand, Educational content, Product Demonstrations, Brand/Product, Customer Testimonials, Influencer Testimonials, Awareness, Culture & Company Values, Special Offers, Giveaways, Contests
Media	Images, Videos, Articles, Infographics	Images, video,	Images, video	Video	Images, Videos, Infographics
Ideal Video Length	1 – 2 minutes	45 seconds	1 – 2 minutes	Up to 10 minutes *(typically shorter is better to keep engagement)*	30 seconds

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Cont: Social Media Cheat sheet					
	LinkedIn	**Twitter**	**Facebook**	**YouTube**	**Instagram**
Resource Expertise Level Needed	Medium - High	Low	Low	Medium-High	Medium-High
Target	Business-to-Business	Business-to-Business Business-to-Consumer	Business-to-Consumer	Business-to-Business Business-to-Consumer	Business-to-Business Business-to-Consumer
Posting Frequency	1 – 2x per week	When applicable	When applicable	When applicable	1 – 7x per week
When to Post	During business hours	Throughout day	When relevant to audience	When relevant to audience	When audience is online
Hashtags	5 – 10 per post	1 – 2 per tweet	Up to 5	Use a handful in the video description. Even better to use keywords.	20 – 30 per post
Audience Building Tips	Post consistently, Add contacts to your network, Encourage employees to share, Engage and respond via comments and groups, Boost posts to broaden audience reach	Use hashtags Engage and respond via comments	Make sure business page is current with description, category, contact info, hours, photo, and CTA button	Optimize for search (YouTube is owned by Google)	Post consistently, Engage and respond via comments, Encourage employees to share
Resource Engagement Level	Low – medium	Medium - High	Low - medium	Low	Medium - High

Plan and Schedule

The best social media strategy includes a schedule outlining regular posting dates across each channel you elect to use. This give you the time to develop a narrative that describes the content for each post, allowing you to build ahead, stage materials, and post consistently. Furthermore, you could consider using one of the many tools available to manage your content delivery, such as the service we use; loomly.com.

The Best Days and Times to Post

Generally, the best time to post on social media overall is 9:00 AM PST (12:00 PM EST) on Mondays. But every network has its own sweet spot.
- The best time to post on Facebook is 10:00 AM PST on Mondays.
- The best time to post on Instagram is 9:00 AM PST on Mondays.
- The best time to post on Twitter is 9:00 AM PST on Fridays.
- The best time to post on LinkedIn is 1:00 PM PST on Mondays.

The Best Time to Post on Instagram
Best times to post on Instagram (in your local time zone)
- Monday   5 a.m., 11 a.m., 1 p.m.
- Tuesday   9 a.m., 1 p.m., 2 p.m.
- Wednesday   5 a.m., 9 a.m., 11 a.m.
- Thursday   5 a.m. to 6 a.m., 11a.m. to 1 p.m.
- Friday   7 a.m., 11 a.m., 2 p.m.
- Saturday   9 a.m.
- Sunday   1 a.m., 7 a.m., 6 p.m. to 8 p.m.

Will these times work for everyone?
Maybe not, since there's no single best time to post for every unique company and situation. You'll find your real best time to post on social media by posting often and measuring performance as you go.

Because newsfeed algorithms (especially those at Twitter and Instagram) consider "recency" as a major ranking signal, posting content when your followers are online is one of the simplest ways to improve your organic reach. This brings us to the bad news: it's hard to agree on a single standard "best time to post on social media." Everyone and their uncle have done a study on industry benchmarks — but the real source of truth always comes back to the data on your company's followers.

Source: HootSuite

Measure and Adjust

To learn best practices for measuring your social media performance, visit SEMRUSH to explore the top social media metrics you should be tracking on each social channel and where to find them. Use them to target your social media goals more accurately so you can track your progress more effectively.

And remember if it isn't broken, don't fix it. To learn more about measuring your social successes and some tools to consider, visit:

Source: [SEMRUSH - Social Media KPIs You Should Be Tracking](#)