

Social Media Guide



for Lawyers v. 2.0

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INTRODUCTION

In our first edition of the *Social Media Guide for Lawyers*, the 2010-2011 Leadership Institute proclaimed that “the world is changing.” Nothing could be closer to the truth, but not in the way one might expect. A recent study entitled “2012 In-House Counsel New Media Engagement Survey,” conducted by Greentarget, Zeuhauser Group and *Inside Counsel*, illustrates how the generational gap for social media use is closing as Facebook, Twitter, and LinkedIn are no longer exclusively utilized by up-and-coming lawyers. In fact, lawyers in the 40-year-old to 60-year-old range are rapidly adapting to social media to complement their traditional marketing efforts and to build and strengthen relationships. In-house counsel and potential clients alike are increasingly using social media as a 21st-century way to select lawyers and outside counsel.

The first edition of the *Guide* featured a “Best Practices Guide” on how law firms and individual lawyers can use social media to add value and generate business. The *Guide* also provided step-by-step instructions for effectively using the “Big Three”—LinkedIn, Facebook, and Twitter—and sample social media policies for law firms as they established parameters for social media use within their firms. Basically, that first edition served as a “Social Media 101.” We have incorporated the majority of that text within this edition for those just diving into the social media pool.

With this second edition, the 2010-2011 Leadership Institute elevates Meritas to the second level of social media use. It shows lawyers and law firms how to harness social media to their advantage by integrating “traditional” media with these new technologies to further expand visibility and exposure. As with the first edition, the goal is not to convince lawyers that social media is the only tool for business development, but rather to demonstrate how social media can serve as yet another tool in a lawyer’s marketing toolbox. Accordingly, version 2.0 of the *Guide* features:

- A list of Facebook’s new features, including Timeline and the new privacy settings,
- Step-by-step guides for creating and using LinkedIn Groups and Twitter Lists, and
- Tips for effectively using social media to share “traditional” marketing materials.

We hope you enjoy the *Social Media Guide for Lawyers v. 2.0*, and we welcome any feedback.

The 2010-2011 Leadership Institute

How-To Guide to Social Media Platforms





FACEBOOK FOR LAWYERS

With more than 845 million active users, Facebook is the most visited web site in the world. Facebook allows lawyers to interact with friends, colleagues, and people from across the globe. It allows users to create online profiles, add friends, exchange messages, and notify other Facebook users automatically when they update their Facebook profile.

Lawyers use Facebook to create personal profiles and connect with old friends, business associates, and others who share their interests. Law firms create business pages to notify their fans about updates involving their lawyers and practice, and to share legal publications and firm blog posts. The primary benefit of Facebook is that it allows lawyers and firms to network professionally on a social and casual Internet platform that is visited by more people than any other site on the planet. On the other hand, interacting on Facebook can be time-consuming if not monitored appropriately, and it allows third parties to post content on a Facebook profile that is not their own if privacy settings are not adjusted.

Facebook is in the process of transitioning its existing Profile to a new Timeline format. A description of Timeline's new features and privacy settings are described later in this section.

How to Create an Facebook Account

Facebook offers two types of accounts: individual and business. Individual accounts are primarily designed for personal use and are best suited for individual lawyers. Business accounts (called Pages) are primarily for organizations and are best suited for law firms. This *Guide* will address how to create an account, set up a profile, add friends, and set privacy features.

How to Create an Individual Account

1. Go to <http://www.facebook.com>
2. Complete the necessary fields under the heading Sign Up (i.e., first and last name, email, password, gender, and birthday), then select **Sign Up**.
3. An e-mail will arrive at the registered e-mail address, which will allow the user to confirm the account and complete registration by selecting the link provided in the email.

How to Create a Law Firm Page

1. Go to <http://www.facebook.com>
2. Select **Create a Page for Celebrity, Band or Business**, located on the bottom right corner of the web page.
3. A new web page will open with the heading Create a Page. Select the appropriate category from the six icons presented on the web page (**Local Business or Place; Company, Organization, or Institution; Brand or Product**, etc.). Select **Company, Organization, or Institution**.
4. Select **Law/Legal** from the drop-down box and enter the name of the law firm. Users must accept Facebook Page's terms of service to continue. Enter the password displayed in the Security Check window and select **Submit**.
5. Select **I Do Not Have a Facebook Account** and fill in the necessary fields (email, new password, date of birth), and the Security Check password. Agree again to the Terms of Service and Privacy Policy to complete the account.
6. After users have created their law firm profile, they can learn how to administer the profile, promote the page, adjust privacy features, and interact with others by selecting **Account** in the top right corner of their profile, selecting **Help** from the drop-down box, and then choosing **Ads and Business Solutions**.

Set Up a Facebook Profile

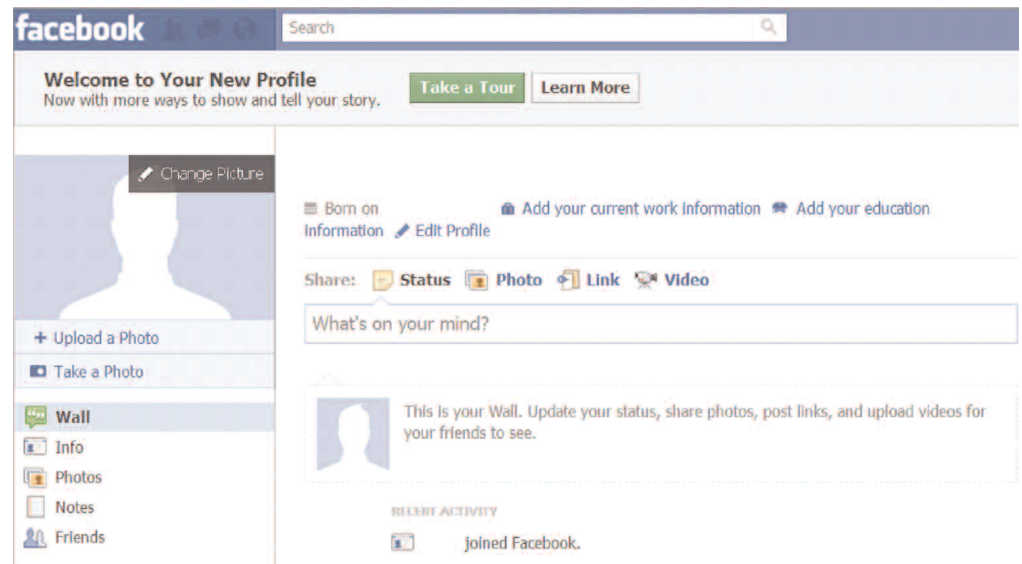
Facebook's Help Center provides all the information to set up and manage a Facebook Profile. Access the Help Center by selecting **Settings** on the top right corner of the Facebook Profile, choosing **Help** from the drop-down box and then **Facebook Basics**. At a minimum, users should complete the process to Upload a Profile Picture, Enter Profile Information, and Add Friends. Facebook suggests the following steps to accomplish these introductory features.

Upload a Profile Picture

1. A Profile Picture is commonly displayed at the beginning of a Facebook page. Users should select a recent photograph of themselves or their law firm's most recent logo for the firm's page.
2. To upload a Profile Picture from a computer hard drive, users place their mouse over the upper right corner of their current Profile Picture or temporary image, and select the pencil icon that appears.



3. Select an option among the following to find a picture to upload from the user's computer: **Choose from Photos** (already uploaded on the page), **Take Photo**, or **Upload Photo**.



4. Then select **Upload Picture**. The picture will display if it is an acceptable size and file type.
5. For more information on how to manage photographs, go the Help Center and select **Facebook Basics > Explore Popular Features > Photos > Upload Photos** and **Edit Profile**.

Enter Profile Information

Facebook allows lawyers to easily add and edit information about themselves, their relationships and family, employment, and interests. Individuals choose the amount of information they want to share with the Facebook community. At minimum, we recommend lawyers input employment information so that Facebook users can learn about their area of practice and methods to contact them.

1. To add this information, select **Edit Profile** in the top right corner of the Profile; or if you already have updated your page to the new Facebook Timeline, go to **Update Info** on the top of the page right under the banner's picture.
2. Select **Education and Work** from the left menu.
3. Type the name of the employer into the Employer field. If a page exists for the employer, the profile will link to it. If lawyers want to add an employer that does not have an existing page, they will be prompted to create a new page. Users also can remove an employer by selecting the *x* to the right of the employer.

For more information about how to add content to a Profile, select **Help Center** on the upper right corner and then select the **Profile** icon in the center of the web page. If you already have the new Facebook Timeline, select the arrow on the top right corner of the page, right next to Home, then select **Account Settings > Help > Facebook Basics > Explore Popular Features > Profile/Wall**.

Add Friends

1. To locate people they might know, lawyers can use the Facebook Search box on the top center of their Facebook Profile. Type the name of the person in the Search box.
2. After users find a person, they can select **Add as Friend** to the right of their search listing. A Friend Request will be sent to that person. Once the recipients confirm that they actually are friends with the sender, they will show up on the sender's Friends List (the Privacy Settings discussed below allow users to control the type of content and interaction for each Facebook Friend).
3. A Facebook user who wants to be Friends with another user will send that person a Friend Request. Lawyers can accept the Friend Request by selecting the icon on the upper left portion of their Profile, choosing the Friend Request, and selecting **Accept**.
4. If users do not want to accept particular Friend Requests, they can click **Not Now**. This will hide the Request for later action. If they choose to hide a Friend Request, the notification for the Request will no longer appear on the home page. To confirm or delete the Request later:
 - Go to the Requests page in step 4 above
 - Select **See Hidden Requests**
 - Confirm or delete individual or all Hidden Requests
5. If a user hides or deletes a Friend Request, the sender will not be notified.

Establish Facebook Privacy Settings for Individual Accounts

Facebook offers several privacy options. Facebook users can make their entire Facebook Profile publicly available to all Internet users or limit access to certain Friends. The Leadership Institute learned that the two primary reasons for Meritas lawyers not using Facebook are the ability for third parties to interact with a lawyer's Facebook profile and the potential for someone to post unwanted content on a lawyer's or law firm's profile. To alleviate this concern, we have described various options for limiting information from being shared on Facebook and for controlling the users who can interact with a Facebook Profile.



Basic Privacy Features

1. For Facebook Profiles, log in and select **Settings** on the top right corner of the web page. Select **Privacy Settings** from the drop-down box, which will open a new web page.
2. This new web page provides privacy settings for two scenarios: Connecting on Facebook and Sharing on Facebook. First, select **View Settings** under the Connecting on Facebook heading to open a new web page. This page allows users to modify basic settings for their Facebook page.
3. The web page is separated into two columns. The left column contains a list of content for which users can control access, followed by a brief description. The corresponding right column is the privacy setting for each type of content. Facebook's default setting is to make content available to everyone, so Friends can find and connect with each other. Lawyers who would like their Facebook profiles entirely public should not modify these privacy options.
4. To limit access to some or all of this content, select the corresponding drop-down box on the right column and choose from the most public to most private options (Everyone, Friends and Networks, Friends of Friends, or Friends Only). For example, to allow only Friends to message a particular Facebook account, find the row beginning with **Send You Messages**, select the corresponding box on the right column, and change the options in the drop-down box from **Everyone** to **Friends Only**.
5. To create a Facebook page that allows people to find and view the business-related aspects of a Profile, but restricts access to more personal information to Friends only, select **Friends Only** for the categories titled **See Your Friend List** and **See Your Likes, Activities and Other Connections**, and leave the remaining settings set to Everyone. Once the preferred options are selected, select **Back to Privacy** on the top left corner of the web page.

The screenshot shows the Facebook Privacy Settings interface. At the top, there's a navigation bar with 'facebook', a search bar, and links for 'Home', 'Profile', and 'Find Friends'. Below this, the page title is 'Choose Your Privacy Settings > Connecting on Facebook'. There are two buttons: 'Back to Privacy' and 'Preview My Profile'. A notice states: 'Your name, profile picture, gender and networks are visible to everyone (learn more). We also recommend setting the other basic settings below open to everyone so friends can find and connect with you.' The main content is a table of settings:

Setting	Description	Privacy Setting
Search for you on Facebook	This lets friends and family find you in Facebook search results. Set this to Everyone or you could miss friend requests.	Everyone
Send you friend requests	This lets you receive friend requests. Set this to Everyone to avoid missing out on chances to connect with people you know.	Everyone
Send you messages	This helps you make sure you know people before adding them as friends.	Everyone
See your friend list	This lets you connect with people based on friends you have in common. Your friend list is always available to applications and your connections to friends may be visible elsewhere.	Friends Only
See your education and work	This helps you connect with classmates and colleagues, and discover new professional opportunities.	Friends Only
See your current city and hometown	This helps you get in touch with neighbors and old friends. Note: you can separately control how you share places you check in to on the main privacy page.	Friends Only
See your likes, activities and other connections	This lets you express your interests and experiences, and connect with people who like the same things you do.	Friends Only

6. The second option, **Sharing on Facebook**, allows users to control how other users can interact with their Facebook profile. These settings allow users to control, among other things, who has access to their contact information, photos in which others tag them (photos on other Facebook pages that picture them), and the ability for others to write on a Facebook “wall” (that is, leave comments that are visible to others on a profile).
7. Facebook easily allows users to control all of the privacy settings with a single click of a button if they choose. Select **Everyone** to make a profile publicly available, **Friends of Friends** to allow a user’s Facebook Friends and their Friends to interact with a profile, **Friends Only** to restrict access to only a user’s Facebook Friends, or **Recommended** to make certain information (such as the photos and content *the user* chooses to post) available to the public while limiting other information (such as the ability for third parties to post comments) only to the user’s Facebook Friends. Facebook’s Recommended setting provides an easy way to adequately control most of the content on lawyers’ Facebook Profiles, while allowing their approved Facebook Friends to interact.

Advanced Privacy Features

Facebook users have options beyond the basic Privacy Settings, including the ability to customize the settings instead of selecting Facebook’s preprogrammed options.

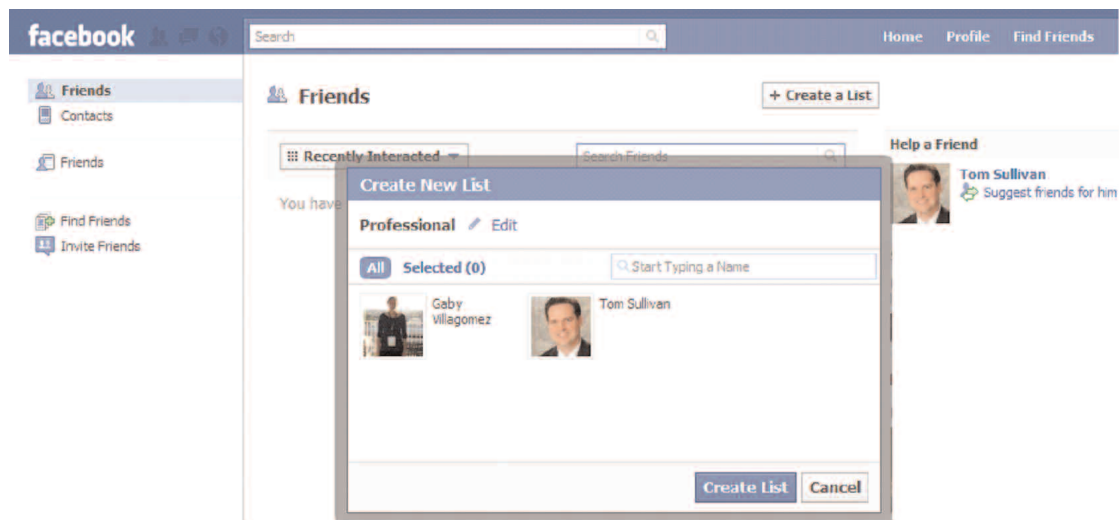
1. Selecting **Customize** opens a new web page that allows users to control all content and interaction associated with their Profile. Repeat the steps outlined in step 4 above to modify the corresponding privacy feature to the type of content displayed on the page.
2. In addition to the standard privacy options (Everyone, Friends Only, etc.), Facebook allows the creation of Custom Privacy options. By selecting **Custom Edit** from the drop-down box, users can access a small web page to make content visible only to them by selecting **Only Me**, or only to specific Facebook users by selecting **Specific People** and typing their names into the provided field. Facebook will automatically identify the specific Facebook Friends to whom users choose to provide access, as long as they have previously added them as a Friend.
3. Users also can hide information from specific people by typing their names into the **Hide This From These People** text box. This allows lawyers to add someone as a Facebook Friend, but limit specific information, photos, or posts from that Facebook user. Once the customization is complete, select **Save Settings**.



Expert Privacy Features

Lawyers who are most successful at using social media to promote their practice understand how to network both personally and professionally. Facebook allows users to organize their Facebook Friends into lists so they can control the amount of interaction and information available to certain Facebook users. The following tutorial will explain how lawyers can create a list for Friends so they can provide greater access to those they trust, and a separate list of Professionals for which they can limit the amount of information and interaction.

1. Select **Account** in the upper right corner and choose **Edit Friends** from the drop-down box. A new web page will open with the heading Friends and provide a list of the user's Facebook Friends in alphabetical order.
2. Select **Create a List** on the top of the screen and a smaller web page will appear in the middle of the profile. Type **Friends** in the box on the upper left corner, choose the Facebook Friends to add to this list, and select **Create List** on the bottom right corner when finished. A new web page will appear showing the Facebook users selected for the Friends list. Repeat these steps to create a Professional list. Users can create as many lists as they wish (i.e., Family, Friends, Alumni, Professional, etc.).



3. Lawyers can change the designated list for each Facebook Friend at any time by selecting **Account** followed by **Edit Friends** from the drop-down box. To the right of each Friend's name, select the **Edit Lists** button and select the list(s) to which that Friend should belong. Friends will be part of only the lists identified by a check mark.

- Once users create their lists, Facebook will provide the opportunity for them to easily add new Friends to these lists. Each time they send or receive a Friend Request, Facebook will ask them to which list(s) their new Friend should belong.

After users create their lists, they can follow steps 1 and 2 under the **Advanced Settings** section above to customize which types of information and interaction they wish to allow each list. For example, if they want to restrict the content they post on their Facebook profile only to their Friends list, but not to their Professional list, they can select **Custom** from the drop-down box next to **Posts by Me**. Under the **Make This Visible To** section, select **Friends Only**. Under the **Hide This From** section, type Professional. This will allow users' Friends list to see their posts, but not the Facebook Friends on the Professional list. Users can easily change this default setting each time they choose to post content on their Facebook profile by selecting the lock icon next to the **Share** button on the Facebook home page.

Facebook Timeline

Timeline is Facebook's new incarnation of the Profile. Timeline arranges the user's existing Profile information, photos, wall posts, and other content into a chronological collection of the user's Facebook experience. When users transition their Profile to Timeline, all of their existing Profile information and privacy settings are contained in the Timeline. Unlike "traditional" Facebook Profiles, Timeline allows users to add a prominent cover photo, input major life events, and highlight important stories.



Facebook will automatically transition Profiles to Timeline. If users prefer to transition to Timeline earlier, they can visit <http://www.facebook.com/about/timeline>, log into their existing account, and follow the prompts to effectuate the transition, or select the **Get Timeline** button displayed on their Profile.

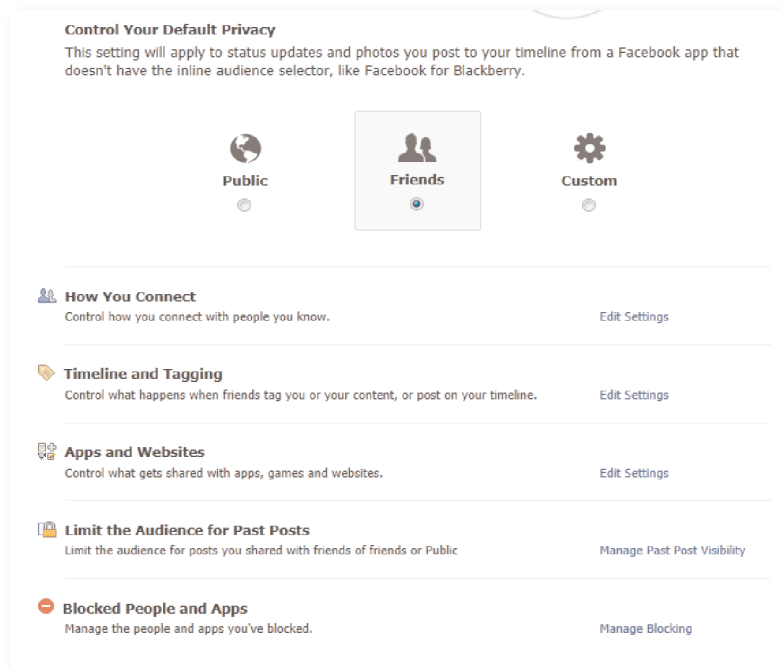


Basic Privacy Features on Timeline

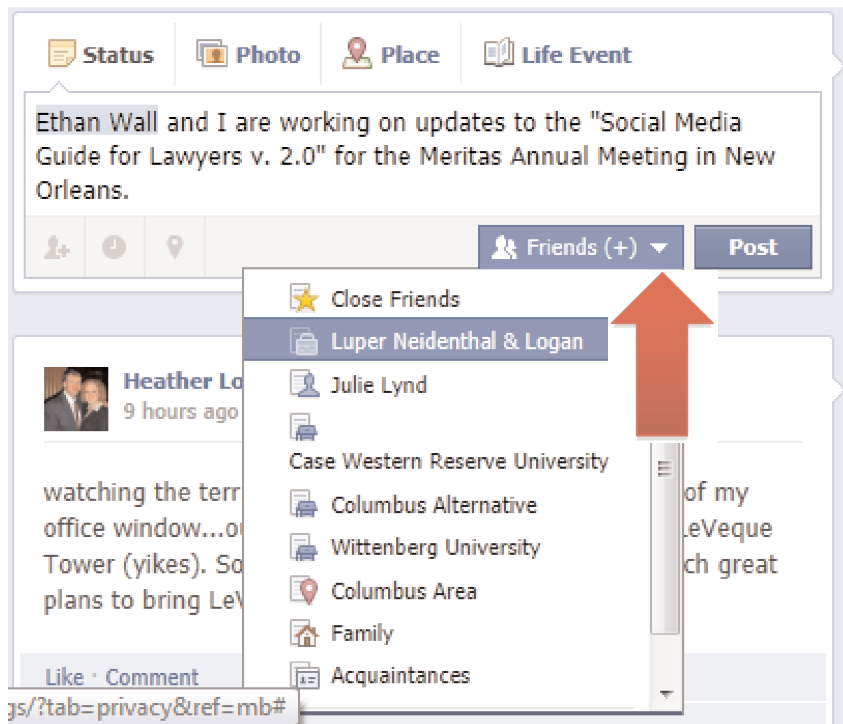
1. Select the account menu arrow (▼) at the top right of the user's Facebook page, and choose **Privacy Settings**.




2. The Privacy Settings page lists a group of general controls for the user's Facebook account, including which users can send Friend Requests and messages, tag the user in photos, interact with the user's content, or post on the user's Timeline.



3. Users can also control the Privacy Settings for each post (e.g., individual status update or photo). After entering the post, the user can select the downward arrow next to the post and choose from that set of options to determine who can see the post. Instructions on how to create additional lists, such as Friends and Professionals, are included in the Expert Privacy Features section above.



Control Who Can Post to a User's Timeline

1. Only users and their Friends can post to the users' Timeline. To block people from posting to a user's Timeline, open the account dropdown menu () at the top right corner of Facebook and select **Privacy Settings**.
2. Next to the How You Connect heading, select **Change Settings**.
3. From the dropdown menu next to "Who can post on your wall?" choose **Only Me**. Keep in mind that a user's Friends can comment on posts they can see, including posts on the user's Timeline, even if the user has restricted who can post to his/her Timeline. If a user wants to totally block individuals from posting to his/her Timeline, including commenting on posts from others, the user must also limit others from seeing Friends' posts on the user's Timeline.



Control General Information About the User

1. A user can choose who can see basic information such as the user's hometown or birthday. Select the **About** heading on the user's Timeline. The screen below will appear.

2. Each section of a user's profile appears. Next to each section of the profile, select **Edit** (**Edit**). An Audience box will appear. The user can then choose who has access to that specific information.

For additional information on privacy features available in Timeline, go to the **Help** section in the upper right-hand corner of the user's Facebook page.

Conclusion and Next Steps



The Meritas Leadership Institute hopes that the *Social Media Guide for Lawyers v. 2.0* serves as a helpful handbook for lawyers and law firms who want to use social media to effectively promote their practice. The next steps will depend on each reader's personal and professional goals and interests for using social media in his or her career. We recommend the following three steps as a good place to start:

1. Determine the Right Social Media Platform for the Lawyer or Law Firm

There is no one-size-fits-all approach to selecting the appropriate social media platform(s). We suggest lawyers set aside an hour on their calendar one afternoon to visit the three main social media sites and see what they have to offer. They should ask their contemporaries about the social media sites they use, consider how each site can benefit them or their firm, and then sign up for one. Social media is still in its infancy and will continue to grow steadily, so lawyers who come on board now will have an advantage as social media continues to gain momentum.

2. Consider Whether Your Firm Should Adopt a Social Media Policy

The Leadership Institute believes the benefits of social media outweigh the concerns, as long as the sites are used appropriately. Law firms may already have a policy in place to govern social media use by lawyers and staff. If not, the social media policies suggested in this *Guide* can serve as a good template for forming the policy that works best for each firm. Lawyers can share this *Guide* with their managing partner or human resource director to see if our suggested policies are right for their situation.

3. Still Undecided? We Recommend Lawyers and Firms Begin with LinkedIn

LinkedIn is a great starting place for a lawyer's or firm's social media presence because it is "less social and more networking." Business leaders and lawyers alike generally feel most comfortable using LinkedIn because it is a trusted place for interacting with business leaders without the fear of others posting unwanted content on the profiles. LinkedIn is user-friendly and allows lawyers to create a professional profile with a minimal investment of time. If they're still skeptical about the benefits of social media, we suggest lawyers search for their colleagues on LinkedIn and see for themselves who is already connecting with people they know through social media.

If readers have any questions about the *Guide*, or how they can incorporate social media into their practice, they are welcome to contact their nearest 2010-2011 Meritas Leadership Institute class member, listed on the following page. Leadership Institute members can serve as a helpful social media resource and are available for speaking engagements and social media demonstrations.

Happy Tweeting!

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