# Social Media Guide

# for Lawyers

# v. 3.0

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# INTRODUCTION

In the first edition of the *Social Media Guide for Lawyers*, the 2010-2011 Leadership Institute proclaimed that "the world is changing." Nothing could have been closer to the truth. Over the last five years, hundreds of thousands of lawyers have flocked to LinkedIn, Twitter and Facebook to develop personal and professional profiles to connect with family, friends and colleagues. Now, lawyers and law firms are increasingly turning to social media for marketing and business development. In doing so, the question is no longer *whether* lawyers and law firms should use social media to promote their practice but *how* it can be done effectively while avoiding serious ethical pitfalls with lawyer advertising. The world has indeed changed.

The first edition of the *Guide* featured a "Best Practices Guide" on how law firms and individual lawyers could 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. Basically, that first edition served as "Social Media 101," providing a foundation for those just diving into the social media pool.

With the second edition, Heather Melick of the 2010-2011 Leadership Institute and I elevated Meritas to the next level of social media use by showing 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. The second edition is largely incorporated into this *Guide* with significant updates, new features, and effective tips on how to take advantage of the current features offered on social media.

In this third edition, I address the primary reason why lawyers and law firms have yet to fully embrace social media for marketing: the uncertainty surrounding how the advertising ethics rules apply to social media. While advertising rules generally govern the message, not the medium, many lawyers and law firms are still uncertain about how the lawyer advertising rules apply to social media and how they can use these marketing tools safely. The *Guide* will empower lawyers and law firms to use social media safely by summarizing the applicable advertising rules, explaining how the advertising rules apply to a lawyer's personal and professional social media use, and providing examples of actual social medial profiles to assist Meritas lawyers. Armed with this information, lawyers can connect with confidence, develop their professional online presence, and effectively use social media to generate business.

I hope you enjoy the *Social Media Guide for Lawyers v. 3.0*.

Ethan Wall, Social Media Law and Order
Member of the 2010-2011 Leadership Institute

# How-To Guide to Social Media Platforms

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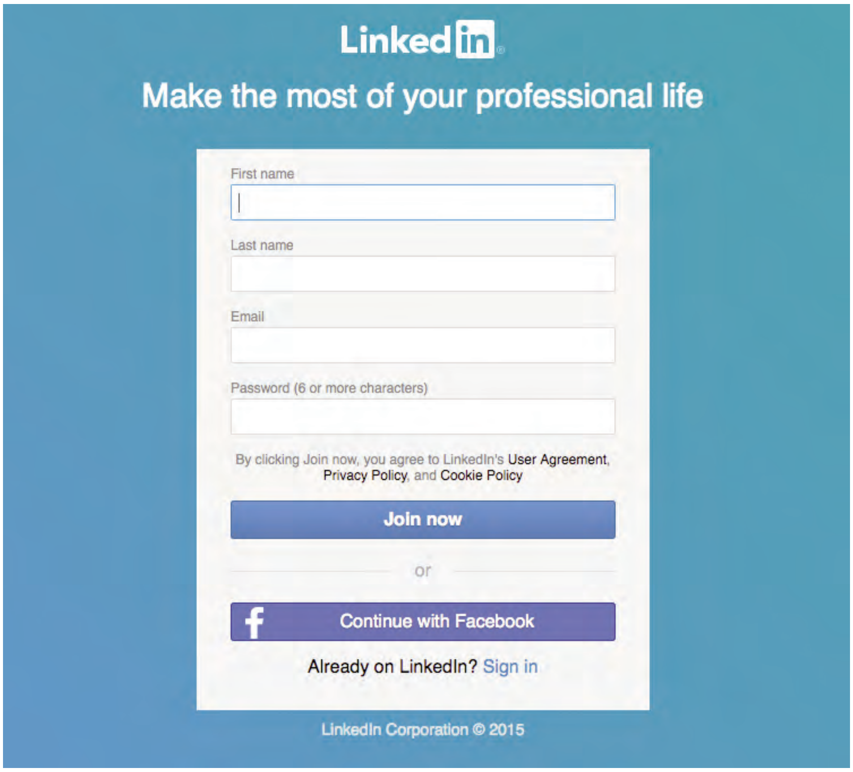
## LINKEDIN FOR LAWYERS

LinkedIn is a business-oriented social networking site with a membership of more than 300 million professionals from around the world, representing 150 industries. LinkedIn serves as an online resumé, offers the ability to network with business professionals, and supports discussion threads on topics relevant to lawyers, law firms, and the business community. Lawyers and law firms can use LinkedIn to "connect" with people they know and trust, participate in online networking groups, and as an online resource to make introductions with mutual contacts.

The primary benefit of LinkedIn is its focus on business networking, therefore, the amount of personal online interaction between LinkedIn users is limited.

### Create a LinkedIn Account

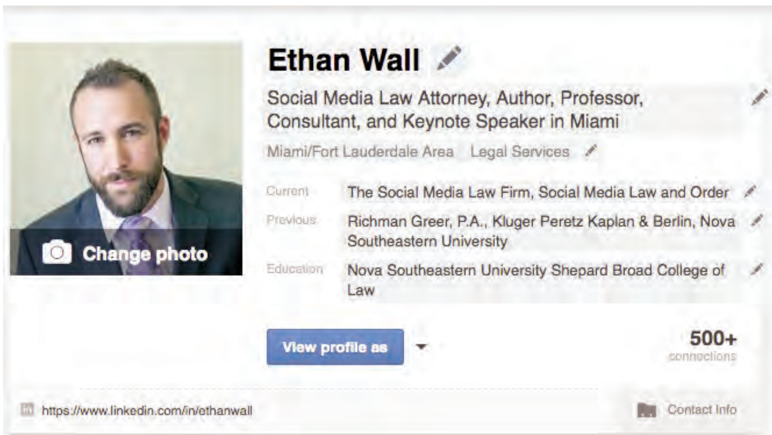
1. Go to http://www.linkedin.com
2. Select **Join Today** in the top menu bar.
3. Complete the necessary fields (first name, last name, password and email) and select **Join Now**.



4. A new page will appear. Complete the necessary fields (country, professional title, law firm name) and select **Create My Profile**,
5. LinkedIn will send an email to the address provided. Select **Finish Your Profile** in the email to activate the account. The LinkedIn login page will appear. Enter the email and the password provided to LinkedIn in step 3.
6. The **Add Position** page will appear. Fill out the necessary fields (law firm name, title/position, city, time period with the law firm, and a description of the position). Select **Save Changes**.
7. The lawyer now has a basic account with a very limited profile. To maximize the potential of LinkedIn, complete the profile, and update it as events and/or changes occur.
8. LinkedIn can automatically generate requests to connect based on the names of individuals in a lawyer's email contact list, depending on the law firm's email security settings (this process may require help from the IT department). Lawyers are not required to allow LinkedIn to review the contacts in their office email accounts. Connecting the office email contact list simply aids in making quicker connections on LinkedIn.

## Completing a LinkedIn Profile

Lawyers should follow these steps to provide information about their professional background and practice areas. After entering this information, LinkedIn will suggest individuals they might already know as potential connections.




1. Begin by hovering over **Profile** near the upper left corner of the screen. A selection of choices will appear. Select **Edit Profile**.
2. On the **Edit Profile** screen, the lawyer can list education, past places of employment, website addresses, personal information, professional associations, community involvement awards, etc. The amount of information disclosed is up to the lawyer, but the requested information is generally content that would be found on a professional resumé. The lawyer will also be given the opportunity to provide a summary of themselves, which can be roughly similar to a short-form biography from a web page.

3. Photos can be added to a profile. From the **Edit Profile** view, select **Add Photo**, which is located just above the grey, faceless silhouette. A new page will open. The lawyer can select **Choose File** to browse from files on their computer for a photo of themselves, then select **Upload Photo** to make it their LinkedIn profile photo.
4. LinkedIn provides a tracking tool to gauge the growth and strength of a profile. On the **Profile** screen, in the top right corner, the lawyer can see the strength of their profile, as compared with other users, and as calculated by LinkedIn.

## Start Making Connections

Once the lawyer is satisfied with their profile, they should begin making connections.

### Search and Add Connections

1. The search bar at the top of LinkedIn allows browsing of LinkedIn in various ways. The left side of that search bar allows users to select People, Companies, Jobs, and other categories. The lawyer can start with People and input their colleagues, family, and professional associations.
2. Searches will generate a list of relevant profiles of people with whom users may connect. There are often several profiles for the same name, so the lawyer should look for the ones that match the present location and place of employment of the person for whom they are searching. Selecting a name will bring up an abbreviated version of the person's profile and confirm that it's the person with whom the lawyer wants to connect.
3. Once the lawyer feels comfortable that they have found the right profile, they can select the link on the right **Add to Network**. They will be taken to a page that will generate a connection request and will have the option of specifying how they know the person (i.e., Friend, Colleague, We've Done Business Together, etc.) and sending a brief note. It is acceptable LinkedIn etiquette to not personalize the note and simply use the form version.

### People You May Know

1. An alternate way to make connections is to browse the **People You May Know** page. From the Home page, select the "People You May Know" link on the top right. This will open a new page of suggested contacts. LinkedIn automatically generates this list of contacts based on mutual friends, place of employment, city of residence, industry, past education, etc.
2. If the lawyer finds someone they know and would like to connect with, they may simply select **Connect** and an invitation will be sent to that person. The lawyer can also select the other user's picture to review the person's profile and connect from that page. The lawyer must exercise caution to not send an invitation to connect with opposing parties or members of the judiciary that they are likely to appear before in court if their jurisdiction prohibits it.

## Establish LinkedIn Privacy Settings

Because LinkedIn does not solicit much personal (i.e., non-work related) information, there are relatively minimal privacy concerns. A carefully developed profile will likely convey similar information to what would appear on a law firm's biography for the lawyer. However, if a lawyer has privacy concerns and wishes to establish some privacy settings, hover the cursor over the lawyer's photo in the upper right corner and a list appears. Select **Privacy & Settings**. A new screen appears and the lawyer has a series of privacy controls to choose from at the bottom of the screen.

### Control How a Lawyer is Notified that Another User Viewed Their Profile

LinkedIn notifies a lawyer every time another user views their profile. LinkedIn then stores this information and tracks a user's viewing history. By selecting the **Flag Icon** in the top right corner of the Home screen, a lawyer can see when other users have viewed thier profile. If the lawyer selects one of those **Notifications**, a new screen will display a graph of viewing activity and list all of the individual viewers.

A lawyer may wish to remain anonymous when viewing another user's profile. To remain anonymous, access the **Privacy & Settings** page again. Click on **Select What Others See When You've Viewed Their Profile**. A lawyer has the option of changing what appears in the notifications sent to the viewed user. For example, a lawyer could wish to remain entirely anonymous or be characterized by industry and employer without attaching the lawyer's name.

When a lawyer selects the option to remain anonymous, the lawyer may lose access to the viewing history and the ability to see which LinkedIn users are viewing their own profile, which will prevent the lawyer from learning who is interested in them.

### Control Who Can See a User's Activity Feed and Connections

1. LinkedIn provides the lawyer an option to limit when other users can see their posts and activity. Specifically, LinkedIn allows the lawyer to limit the audience to their "entire network," "your connections," "everyone," and "only you." On the **Privacy & Settings** screen, click on **Select Who Can See Your Activity Feed** and then click on the drop-down menu to select the desired audience.
2. LinkedIn similarly allows the lawyer to limit who can see their connections. On the **Privacy & Settings** screen, click on **Select Who Can See Your Connections**. From the drop-down list, select "only you" or "your connections."

### Blocking a User

LinkedIn provides the lawyer with the option to block an individual from viewing their profile. On the **Privacy & Settings** screen, select **Manage Who You're Blocking** and a list of all blocked users will display. To block another user, go to that user's **Profile** page and select the **arrow icon** next to the **Endorse** link. Select **Block or Report** from the drop-down menu. Check the box next to **Block** and select **Continue**. This user will no longer be able to access the lawyer's profile, send the lawyer a message, and, if they were connected, that connection will be severed.

## LinkedIn Groups & Discussion Forums

LinkedIn allows the lawyer to create Groups of LinkedIn members with similar interests and affiliations, providing a forum for them to interact with each other. While joining a Group enables the lawyer to see other members' profiles, it does not automatically add all of the Group's members to the lawyer's Contacts.


Many organizations establish Groups, including Meritas, universities, and professional organizations, as do users in areas of common interest (i.e., law and technology, social media, etc.). LinkedIn Groups allow the lawyer to:

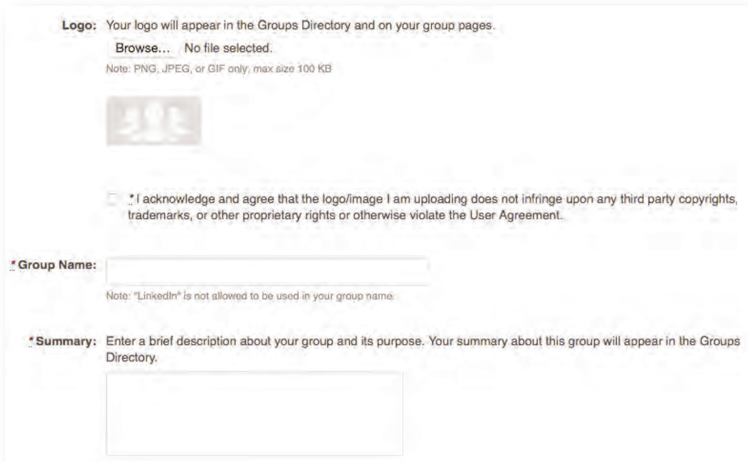
- Discover the most popular discussions in the lawyer's professional groups.
- Take an active part in determining the top discussions by commenting and "liking" comments.
- Follow the most influential people in the lawyer's group by checking the Top Influencers board for the group.
- Find interesting discussions by seeing who "liked" a discussion and how many people have commented on the discussion thread.
- Allow a lawyer to re-connect and network through forums.
- Permit a lawyer to demonstrate an area of knowledge and expertise.
- Locate potential talent for an organization.

The Meritas Group discussion board is often used as a sounding board for law firm management, hot legal topics, or finding a Meritas lawyer that has relevant experience in a particular area.

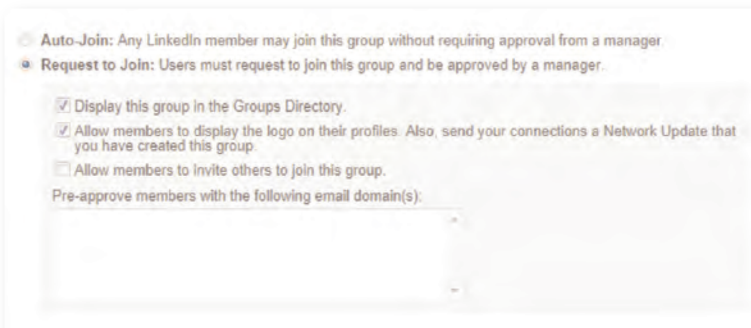
Membership in a LinkedIn Group allows a lawyer to participate in Discussions. Discussions are similar to "traditional" discussion board forums where members of the Group can post comments and responses in a threaded discussion. Discussions are only visible to the members of the Group and only members of the Group can contribute to a discussion thread. The Group Owner can edit or redact comments within the discussion thread.

## Creating a Group

A lawyer can easily create their own Group for an organization or an area of interest. To create a Group:




1. Hover over **Interests** at the top of the LinkedIn page.
2. Select **Groups.**
3. Select **Create a Group.**
4. Name the Group and upload a logo.
5. Use the pull-down menu to choose a **Group Type** (alumni, corporate, conference, networking, nonprofit, professional, or other).
6. Enter a brief description of the Group into the Summary that will appear in the Groups directory.
7. Enter a full description of the Group in the Description area that will appear on the Group page.
8. Enter a website for the organization, if applicable.
9. Enter the email address for the Group Owner.
10. The lawyer can determine how LinkedIn members can access the Group. The Group Owner can select **Auto-Join**, which permits anyone to join the Group without needing approval, or **Request to Join**, where a lawyer must request to be approved by the Group Owner. The latter option allows the Group Owner to give additional Group members administrative control over the Group (send invitations, accept requests to join the Group, change logo, etc.).



## Search for Groups

LinkedIn allows a lawyer to easily find groups of interest by searching for them specifically. To search for a group:


1. Hover over **Interests** at the top of the LinkedIn page.
2. Select **Groups**.
3. Select **Find Group**.
4. Type in name, topic or keyword to generate search results.

## Starting a Group Discussion

The lawyer can share knowledge and interact with another's content within the group setting by engaging in Discussions. To start a Discussion:

1. Hover over **Interests** at the top of the LinkedIn page.
2. Select **Groups**.
3. Type in a topic in the **Discussion Topic Dialogue Box** and select a particular group to share it with.

## Posting on the Activity Feed

To encourage networking and development, LinkedIn continually updates the lawyer's activity feed, maximizing the exposure of the lawyer's content. The lawyer can use the activity feed to highlight recent successes and awards, to provide clients updates on the law, and to generally display knowledge and success. To share an item on the activity feed:

1. From the **Home** screen, type in content in the dialogue box at the top of the page. The lawyer has the option of simultaneously attaching an image or document to the post. Links to websites or other articles may also be copied and pasted into the dialogue box to generate a post.
2. Once a lawyer posts the content, the post will appear in the activity feed of other LinkedIn users with whom the lawyer is connected. Those other users can "like," "comment," or even "share" the original post in their activity feed, fostering additional exposure of the lawyer's content.

### Law Firms

A law firm can create a LinkedIn profile specifically to promote the law firm. To create a law firm profile:

1. From the **Home** screen, hover over **Interests**.
2. Select **Companies**.
3. Select **Create** and then enter the applicable information about the law firm.

Individual users can select a law firm's profile and elect to **Follow** it so that the law firm's posts will appear on that user's activity feed. This will enable that user to remain current on the law firm's activities and status updates.

## Practice Tips for Effective LinkedIn Marketing

The primary purpose of LinkedIn is more than simply a place to post a resumé; the law firm's website already does that. It is to make and expand professional connections, grow a lawyer's network, and generate positive exposure. By developing a professional profile, sharing engaging information, and connecting with other trusted LinkedIn users to expand their valuable professional network, the lawyer can generate new clients and valuable referral sources. Here are some tips:

- ✓ A list of Contacts can act as a handy virtual Rolodex of the complete LinkedIn Profiles in a lawyer's network, but the real power of LinkedIn is that the lawyer can search *their contacts'* contacts for people or companies. These common users are known as second- and third-degree connections. These connections are helpful when a lawyer does not know a LinkedIn user, but wants an introduction from a LinkedIn user they do know that is also connected to that user.
- ✓ Notably, LinkedIn does *not* encourage connecting with people the lawyer does not know. People with whom a lawyer wants to connect must affirm the request, and the lawyer must accept any incoming requests before they are connected. Once someone affirms a lawyer's request, the lawyer will be able to see that person's full Profile and the person will be added to the lawyer's LinkedIn Contacts, which can be seen by selecting the **Contacts** tab at the top of the LinkedIn page.
- ✓ The lawyer can upgrade their account by selecting **Upgrade Your Account** at the bottom left, which will permit the choice of three types of upgraded accounts: **Business**, **Business Plus**, and **Executive**. We recommend a lawyer becomes familiar with the basic LinkedIn account before they consider investing in an upgrade.
- ✓ Additional information about advanced LinkedIn use can be found on LinkedIn's instructional page at [http://learn.linkedin.com/](http://learn.linkedin.com/).

# Conclusion and Next Steps

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The *Social Media Guide for Lawyers v. 3.0* should serve as a helpful handbook for lawyers and law firms who want to use social media to more effectively promote their practice. The next steps will depend on each lawyer's personal and professional goals and interests for using social media in his or her career. Meritas recommends the following three steps as a good place to start:

## 1. Determine the Lawyer's Specific Marketing Goals

Everyone's marketing goals are different. An experienced lawyer will have different goals from first year associates. A lawyer interested in research and writing will have different marketing goals than those who are passionate about public speaking and in-person networking groups. A law firm will have aligned, but slightly different goals from their lawyers. Figuring out the specific marketing goals for the lawyers and law firm will help determine how social media can be used effectively for marketing.

## 2. Determine the Most Effective Social Media Strategies to Accomplish Those Goals

Just as there is no one-size-fits-all approach to legal marketing, there is also no one social media platform or strategy that will accomplish everyone's marketing goals. Each lawyer's social media marketing strategy should take into account which social media sites they currently use, consider how each site can benefit them or their law firm, and then design a strategy that most effectively accomplishes their marketing goals. For example, if a lawyer's goal is to target members of a specific industry, the lawyer could accomplish that goal more effectively by joining a LinkedIn Group tailored to that industry instead of sharing industry related information to the lawyer's personal Facebook friends. On the other hand, a lawyer who wishes to educate their personal network about how they can help in family law matters may be better served sharing information to their friends on Facebook.

## 3. Still Need Help? Don't Be Afraid to Ask

Not everyone is a social media-marketing expert. The lawyer should seek assistance from their marketing director or a social media-marketing consultants to help them develop the right strategy for their goals. Marketing professionals experienced in both social media and the law will help a lawyer and law firm understand how social media marketing strategies can be implemented effectively within the practice of law in a manner that complies with advertising ethics rules. If the lawyer has any questions about the *Guide*, or how they can incorporate social media into their practice, they are welcome to contact the author listed on the following page. The author can serve as a helpful social media resource and is available for speaking engagements and social media training sessions.

**See you on social media!**

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## ABOUT THE AUTHOR

**Ethan Wall** is the founder of Social Media Law and Order where he pursues his passion for educating, consulting, and training lawyers and law firms on all areas of social media. Ethan previously practiced social media, Internet, and intellectual property law at a former Meritas affiliate in Miami, Florida. After serving on the Meritas Leadership Institute, and co-authoring the prior versions of the Social Media Guide, Ethan quickly became widely recognized as an authority on the effect of social media on the law. He has since authored three books including *Fire over Facebook: A Primer on Protected Social Media Activity in the Workplace* and *Best Practice Guide for Managing Employee Social Media Use*. Ethan also developed the Social Media Law and Order blog to chronicle the effect of Facebook, Twitter, and other social media on the law. High profile news organizations, including CNN, NPR, and Thomson Reuters have turned to Ethan for commentaries on social media legal issues.

Ethan has an exceptional reputation for delivering engaging presentations and training programs in the area of social media and the law. Over the last few years, Ethan delivered more than 100 seminars and workshops at national and international legal, business, and industry symposiums including the Meritas Annual Meeting and Regional Meetings, and has published dozens of scholarly articles on social media legal issues. He also teaches a law school course he developed titled Social Media and the Law. He has lectured at the University of Miami School of Law, Nova Southeastern University, and Florida International University School of Law.

Ethan also pursues his dream to leave the world better than how he found it through a charitable initiative called Let's Plant a Seed. He delivers motivational speeches, workshops and programs designed to help people identify their dreams, inspire them to pursue their passions, and encourage them to give back to the world in a lasting way through community service. Ethan regularly volunteers and schedules community service events in South Florida and in locations where he speaks, consults and trains.

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