

STEP AND SOCIAL MEDIA

Guidelines for branches and chapters

INTRODUCTION

Over the last few years, social media has introduced substantial and pervasive changes to the way we communicate, both on a personal and a business level. More and more organisations in our industry are devoting time and attention to social media as they recognise its potential for personal and business development.

STEP has a presence on five social media channels: Twitter, Facebook, LinkedIn, YouTube and Google+. Our work in sharing useful content and engaging with other users in the industry has been rewarded with steady growth in followers. A number of members and branches are taking advantage of these channels with their own accounts, while others are not sure where to start. This document provides guidance, both on the basic uses of social media, and how members and branches can join their efforts with STEP Worldwide.

WHAT IS SOCIAL MEDIA?

Social media is really just another way of communicating with people. It is about creating and sharing content and engaging with people. Social media channels can work alongside more traditional channels of communication: magazines, newspapers, books, company websites, etc as ways of sharing knowledge and creating awareness, but also offer interactivity and immediacy, allowing real-time engagement with readers/users.

WHY IS IT RELEVANT TO STEP?

Many STEP members already use one channel or another for personal and/or business use; whether that is LinkedIn, Facebook, Twitter, or one of the many other channels available. These channels offer us a valuable way to talk to our members: responding to feedback, joining in discussions and explaining what we do.

Beyond member communication, if a potential member, member of the public or journalist wants to find out about STEP they will not just look at our website: they will shop around, trying to find out as much information as they can. There is a global conversation going on that involves STEP and we need to be an active part of it, dictating its direction and content and managing our presence. Using social media channels increases our presence on the web, giving people numerous ways of finding out about our organisation and our members.

WHICH CHANNELS DO WE USE?

- **TWITTER:** a public-facing news and information sharing channel; primarily a signposting space and a way of linking out to other webpages. We have an official STEP account and use it to share news and articles with followers which include members, interested non-members and media, and other industry bodies.
- **LINKEDIN:** a professional forum for networking and discussion. It is a thought-leadership authority builder and b2b marketing tool. STEP has an official company page, a member-only 'Group' and a number of 'Subgroups', where members can discuss topics of interest.
- **FACEBOOK:** a public-facing social forum for networking and sharing updates, news, events and photos. STEP has an official account, which we use to explain what we do and promote STEP activity (events, certificates, etc). Interested members and non-members can 'Like' us to get regular updates on our activity.

- **GOOGLE+:** a public-facing social network site much like Facebook. Google+ is widely integrated with other Google services including YouTube.
- **YOUTUBE:** a video-sharing website where users can view and upload content. STEP has used YouTube to share videos from award events, promotional videos and videos in which members and staff explain industry changes.

HOW CAN YOU GET INVOLVED?

We encourage branches and chapters to explore social media as a means of communicating with both members and potential members at a local level. You can use these channels to promote branch activities, network with other members and discuss locally relevant topics. These channels will enable you to present information as you see fit and establish an approachable local presence for your branch.

Some of the ways branches can use social media are:

- Promoting branch activities
- Supplementing physical meetings with virtual support to enable continuation of the discussion
- Encouraging wider participation and deepening the original debate
- Enabling members to choose when they participate, so reducing the time restraint
- Posting documents, presentation notes and follow-up information both prior to and post meetings.

There are various ways in which you can get involved, from creating a branch/chapter subgroup from the main STEP account in LinkedIn, to setting up a branch account on Twitter.

To maintain consistency and control, ideally you should nominate one person to look after social media. We ask that you let us know the contact details of that person, as well as details of any accounts you set up so that we can follow you and promote your efforts on our accounts as well.

The person responsible for the main social media accounts at STEP is the PR and Media Executive (communications@step.org).

TWITTER

Twitter is about concise content – ‘tweets’ of 140 characters or fewer, including spaces. It relies heavily on links.



SETTING UP YOUR ACCOUNT

When setting up a new Twitter handle it is best to maintain consistency with existing handles. Try to use a handle that uses STEP and the branch/chapter name (e.g. [@STEPWales](#), [@STEPBahamas](#), [@STEPItaly](#)).

In the description, to maintain consistency, please use: *Bahamas branch/chapter of STEP, the worldwide professional association for those advising families across generations.*

Please use the STEP Logo Device and your branch name as your ‘profile picture’ and for the ‘cover picture’ please use a location shot of your branch/chapter or region. Please refer to the STEP Brand Guidelines for more information on this or contact communications@step.org if you need any help with these images.

USEFUL LINKS FOR TWITTER

Event tweet manager: Tweet My Events
www.tweetmyevents.com

Twitter organiser and scheduler: TweetDeck
www.tweetdeck.com

Twitter stats, to analyse your usage and reach:
www.tweetreach.com

The best way to use Twitter is to share information about your branch’s activities, as well as other relevant STEP and industry news and developments you find interesting. The official STEP account is [@STEPSociety](#).

WHAT TO TWEET?

- You can tweet about events, branch activities, local industry news and developments and STEP branch news.
- Bear in mind that this is a STEP branch/chapter account, and not a personal account. Although tweets should have a personal touch, this is not the place to vent your anger. Always bear in mind that Twitter is public-facing and treat with caution. If you have strong or controversial opinions, please use a personal account to state them.
- Use **hashtags** (#) to highlight key terms in your Tweet and make them searchable. This makes it easy for searches to yield results on the particular keywords and, if popular, can start some trending topics. For example using **#mentalcapacity** instead of just ‘mental capacity’ increases the odds of your Tweet appearing in search results on that topic.
- You can tweet pictures: from events, or of your branch committee, etc, and build a library of images.
- There are two ways to communicate with other Twitter users: by using their handle in your Tweet (e.g. [@STEPSociety](#)) they will be alerted that you have mentioned them. Bear in mind that any conversation you have with another Tweeter using each other’s handles will be visible to the public. Direct messaging is a private way of speaking to other users over Twitter.
- There are also two ways to share the content of another user. **Retweeting** repeats another users Tweets in a show of endorsement. **Retweet** other user posts with great reservation and only if it is relevant to your branch or STEP. If you wish to share another user’s Tweet without implicitly endorsing it, copy and paste their Tweet and preface it with **‘RT’** and quotation marks. This comes up as a quote, rather than an endorsement.
- You can shorten links so they take less character space as well as to get stats on who’s been clicking on them. We use bit ly: <https://bitly.com/>

WHEN TO TWEET?

Aim for a **consistent number of tweets per day**, and make sure the frequency is sustainable. Spread tweets throughout the day; don’t tweet in a clump as it suggests you are not a consistent presence on Twitter. You can schedule your tweets, by using Twitter management (free) tools such as ‘Tweetdeck’.

FACEBOOK

Facebook is a social networking site. It tends to be a more personal, less formal space, where people post photos, videos, updates and comments.



Members and the public can ‘like’ us, which means they will be sent alerts and updates every time we add anything to our page.

[STEP’s Facebook page](#) is populated mainly by news, events and links out to the STEP website.

The STEP page is open to anyone. Members and the public can ‘like’ us, which means they will be sent alerts and updates every time we add anything to our page.

Facebook’s ability to host photo albums makes it a useful tool to share images from STEP events.

If branches/chapters wish to have a presence on Facebook we would suggest you either set up a branch ‘Group’, or supply content to the PR and Media Executive to post on the main STEP page. A branch/chapter Group is a closed page that can be set up for branch use only. Interested branch members must request to join the group, which must be managed by the branch. You can use this Group for discussion about local news and developments and promotion of branch activities.

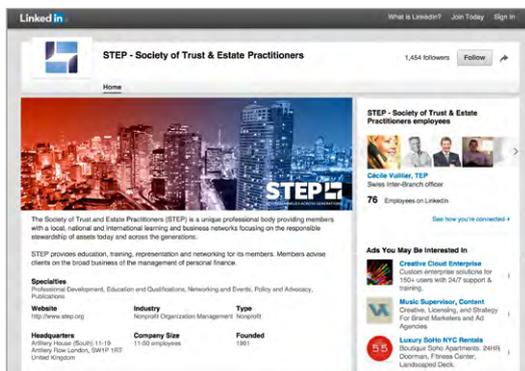
As Facebook is a forum for discussion, it is necessary to moderate posts and user comments and address queries as they occur.

If you decide to set up a Group, please let us know and allow us to join the Group as an administrator to enable us to control the Group if there is any gap or lapse in branch management.

Please use the STEP Logo Device and your branch name as your ‘profile picture’ and for the ‘cover picture’ please use a location shot of your branch/chapter or region. Please refer to the [STEP Brand Guidelines](#) for more information on this or contact communications@step.org if you need any help with these images.

LINKEDIN

LinkedIn is a professional forum for networking and discussion. Anyone can have a profile, which is personal. You cannot have an 'organisation account', so if you want to get involved in LinkedIn, you will first need to set up a personal account. Organisations can, however, set up Groups and Subgroups, and have a company page.



LinkedIn is a particularly popular channel among STEP members, and many have already set up an account

STEP has a [company page](#), a main STEP group which is closed to members, and a number of subgroups (e.g. branch and special interest groups).

When members join the group and any of the subgroups they receive regular alerts about new discussions.

LinkedIn is a particularly popular channel among STEP members, and many have already set up an account.

BRANCH SUBGROUPS

A number of branches have already started using LinkedIn, setting up subgroups of the main STEP group. We would encourage other branches to do the same. We have to set up the subgroup for you, but this would then be managed by the branch. You will therefore need to nominate someone to 'manage' the subgroup and they will be responsible for moderating discussions and maintaining activity on the page.

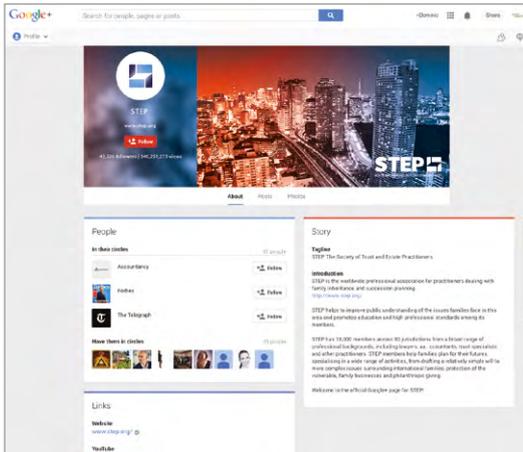
HOW TO USE IT

You can use your LinkedIn subgroup to encourage discussion and knowledge sharing on topics of particular relevance to your locality. Encourage all your branch members to join your branch subgroup – the more people involved the better.

Set the tone by creating discussions and joining in with discussions. Post articles, news, and links to interesting websites, etc, that you think might be of interest to others. This is a great space to follow up discussions from branch meetings or conferences, post speaker notes and widen the discussion beyond just those who attended in person.

GOOGLE+

For most general intents and purposes, Google+ functions in much the same way as Facebook with individual members linking with each other or following groups.



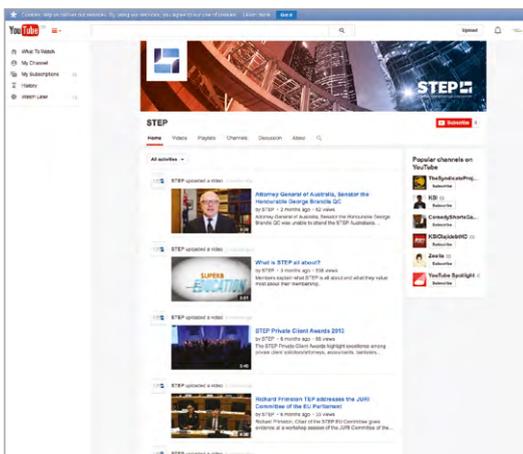
[STEP's Google+](#) is populated mainly with news, events and links out to the STEP Journal. The uptake of Google+ compared to the longer and better established Facebook has been poor however it does have the advantage of being integrated with other Google platforms. For example, sharing a video on YouTube (also operated by Google) will alert members of your Google+ that you have new content to view. To do the same on Facebook requires you to actually post a link yourself rather than doing so automatically.

Posting on Google+ can potentially boost a brand's position in Google search results. Google+ is also useful for discussion with video '[hangouts](#)', in which multiple users can talk via video chat online.

If you decide to set up a [Group](#), please let us know and allow us to join the Group as an administrator to enable us to control the Group if there is any gap in branch management.

YOUTUBE

YouTube is a highly popular video sharing and viewing site.



[STEP's YouTube channel](#) features videos from STEP events like the Private Client Awards as well as useful video explanations of complicated industry developments such as FATCA. YouTube videos may also be embedded in other websites, which is beneficial as it does not require a user to leave the website they are on to view them.

If you have a video of STEP events hosted by your branch/chapter that other practitioners might find useful, please contact the PR and Media Executive to discuss uploading them. Please be mindful of both visual and audio quality and also of any intellectual property considerations where guest speakers should approve their material being shared online.

SOCIAL MEDIA TROUBLE

Social media, in particular Twitter and Facebook, are public-facing and you should always be prepared to manage negative comments or difficult questions.

Please see the advice below on how to handle difficult situations.

- **Respond quickly.** The longer someone waits for a reply the more angry that person can become. Let the individual know publicly that you have heard their frustration or problem and that you're on it.
- **Never show anger or engage in negative banter.** Don't stoop to an angry commenter's level, as it can quickly escalate and may bring STEP into disrepute.
- **Work toward a resolution.** Let an aggravated user know that you're doing everything within your power to address the situation fully. Leaving the matter unresolved leaves STEP open to further criticism.
- **Talk offline when necessary.** Use direct messages on Twitter or email if the discussion is detailed. Your initial response should be public, though, to let everyone know that you're on the issue and will address it.
- **Resolve.** Once resolved, make sure you publicly update on the resolution, and show the argument has been settled. Remember, if the comments persist, this is not your fault. Do not engage in argument and contact us for advice/the website's moderator to help you block them from your page.
- **Feedback.** Always respond to feedback, good or bad, in a neutral and polite tone.

Please do keep us informed of any difficulties in this area, and if you would like to discuss the matter we would be happy to help. Contact a member of the STEP Communications Team on communications@step.org or telephone **+44(0)203 752 3700**

USEFUL LINKS

[STEP Society on Twitter](#)

[STEP on Facebook](#)

[STEP on LinkedIn](#)

[STEP on Google+](#)

[STEP's YouTube channel](#)

See [STEP's Brand Guidelines](#) for help with imagery and logos for your social media pages.

[Bitly](#) is a useful free service that shortens website URLs, reducing the number of characters they take up.

Engagement is better sustained by smaller feeds of information than large, time consuming posts.

Use images whenever possible. Posts using accompanying images receive 90 per cent more clicks than those that don't.

CONTACT

STEP Communications Team on communications@step.org or telephone **+44(0)203 752 3700**